

# DOWNLOADING PERSONAL LINES POLICY DATA TO AN AGENCY MANAGEMENT SYSTEM

You can receive downloads of personal lines policy data to import into your agency management system. This document details the required steps:

1. Prepare your agency management system to allow downloads
2. Set up download preferences in DSpro
3. Enable personal lines downloads on *www.agentexchange.com*
4. Import files to your agency management system

## Preparing your agency management system to allow downloads

**Note:** If you already download commercial or personal lines data with DSpro, go to step 3.

1. In your agency management system, enter the origination address, GEN814ERIEINS, for ERIE business in the appropriate field in your agency management system.

**Note:** ERIE does not use IVANS to download the ACORD information. Depending on your agency management system, you may need to set the **Company Direct** option.

2. Enter the following NAIC codes in the appropriate field in your agency management system:

Company	Code
Erie Insurance Exchange	26271
Erie Insurance Company	26263
Erie Insurance P & C (WV)	26830
Erie Insurance Company of NY	16233
Flagship City Insurance Company	35585

3. Open the [Company Unique Coverage Codes](#) document and enter all of the codes into your agency management system. This allows policies to be properly interfaced and reduces the number of policies that are placed in your Suspend file.

## Setting up download preferences in DSpro

1. From the DSpro Navigator, select **Preferences > ACORD Interface**.
2. If you are using commercial lines download, use the information from the webform on *agentexchange.com* for system and version.
3. In the **File name and extension of the ACORD file** field, enter the appropriate ACORD file name.

**Note:** If you need assistance determining the appropriate file name, contact your agency management system vendor.

4. In the **File path of the ACORD file** field, select the appropriate directory path.

**Important:** The directory selected **cannot** be the root directory.

5. Click **OK**.

## Enabling Personal Lines downloads

1. Open [www.agentexchange.com](http://www.agentexchange.com).
2. Click the **Personal** tab.
3. Under **Resource Material**, click **Agency Management System Resources**.
4. Click **Personal ACORD Interface Preferences**.

**Result:** The Personal ACORD Interface Preferences Form displays.

Personal ACORD Interface Preferences  
Agency: XX1000 - DS PRO TEST

**Enable Download** Submit Cancel

Select the agency management system you use:

\*System: APPLIED - TAM \*Version: 1.5 \* - Required

LOB	Enable Daily Download	Request Initial Load	Download Enabled Date	Initial Load Date	Preference
APV - Personal Auto	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
BTP - BoatProtector	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
DP - Dwelling Property Liability	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
HP - HomeProtector	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
IMP - Personal Inland Marine	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
MHP - Mobile HomeProtector	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
PCL - Personal Catastrophe Liability	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
UDW - Ultrasure for Landlords	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

ACORD Dwelling Fire Submit Cancel

5. In the upper left corner, select **Enable Download**.
6. In the **System** field, select your agency management system.
7. In the **Version** field, type the version of your agency management system.
8. For each line of business listed, you can choose one or both of the following:

- **Enable Daily Download:** Downloads the changed and new policy information daily.
- **Request Initial Load:** A one-time download (processed on Sundays) of the current version of the policies, by line of business, to be loaded into your agency management system.

**Note:** The initial load option downloads the current version of the policy and moves what you have in the system to history. While it may be necessary to perform an initial load more than once, note that information in your history file could be duplicated.

**Note:** If you currently download APV and HP using DSpro, it is recommended to **NOT** choose the **Initial Load** option for these lines of business.

**Note:** Initial load files can be very large. You may want to consult your agency management system vendor to determine the best way to select the lines of business for initial load.

9. After you have selected all desired lines of business, click **Submit**.

**Result:** The daily files download during the next DSpro download batch process. The initial load files process on Sunday and are placed in your DSpro mailbox on Monday. The initial load files have a Sunday date and time stamp.

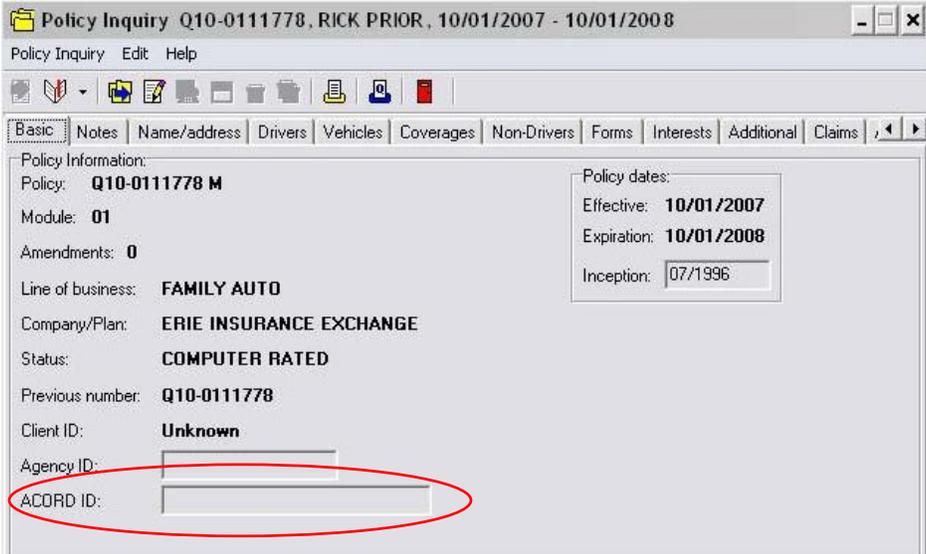
**Note:** If you are currently downloading Auto and Home with DSpro, these selections will not be transferred to the Personal ACORD Interface Preferences. You will need to select all lines of business that should be downloaded.

## Importing the files into your agency management system

After the files download to your PC, you must complete the process by importing the file (from the directory you indicated in DSpro) into your agency management system. Refer to the documentation provided with your agency management system for instructions.

For additional naming convention information, refer to [Personal Lines ACORD file name](#) in the following table.

## Troubleshooting

Topic	Information
<b>Address verification</b>	Some downloaded addresses may not appear as you originally entered them because the automated address verification routine used at the Home Office does not work with manually entered data.
<b>Manual policies</b>	At this time, some ERIE personal lines policies are not system-rated. Images of the declarations for these policies are loaded in the policy's Remarks area in your agency management system. If you cannot find the detail information for a policy, look in the Remarks area.
<b>ACORD ID number</b>	<p>Enter the <b>ACORD ID</b> in DSpro on the Basic screen to enable matching of policy information between DSpro and the agency management system. This may help to reduce the number of policies that are placed in the Suspense file.</p> <p><b>Note:</b> Entering the ACORD ID is optional.</p>  <p>The screenshot shows a window titled "Policy Inquiry Q10-0111778, RICK PRIOR, 10/01/2007 - 10/01/2008". The "Basic" tab is selected, showing policy details: Policy: Q10-0111778 M, Module: 01, Line of business: FAMILY AUTO, Company/Plan: ERIE INSURANCE EXCHANGE, Status: COMPUTER RATED, Previous number: Q10-0111778, Client ID: Unknown. The "ACORD ID" field is empty and circled in red.</p>
<b>VIN look up procedure</b>	When the VIN look up procedure is run at the Home Office, the vehicle description and cost new of any entered vehicle may be updated with information from the VIN look up provider.
<b>What we are not downloading</b>	<ul style="list-style-type: none"> <li>• Claim information</li> <li>• Billing information</li> </ul>

Topic	Information
<b>Personal Lines ACORD file name</b>	<ul style="list-style-type: none"> <li>• For Applied Systems, the file name is RECV-ACD.***</li> <li>• For AMS Prime, the file name is DOWNLD.***</li> <li>• For AFW prior to V5.X, the file name is DIRECT.***</li> <li>• For AFW, the file name is DIRECTERL.***</li> <li>• For DORIS, the file name is <i>Agent#-yyyymmdd.AL3</i></li> <li>• For Eclipse, the file name is ERIE.***</li> <li>• All other agency management systems use the following Commercial ACORD naming convention:</li> </ul> <p>The default naming convention for the file is: <i>Agent#-yyyymmdd.dat</i> (for example, AA1234-20080201.dat)</p> <p><b>Note:</b> Files are created each night as part of the DSpro nightly batch process. The date in the file name is the day the data was processed.</p>
<b>Change effective date download</b>	<p>If a policy change generates a new declaration, the change effective date is downloaded with the record. If the policy change does <b>NOT</b> generate a new declaration, the run date (download date) is downloaded with the record.</p>
<b>UDW line of business</b>	<p>The ACORD product download default type for the Ultrasure for Landlords line of business is Dwelling Fire.</p> <p><b>Note:</b> You can select a different ACORD product type if the default option does not work with your agency management system.</p>
<b>Location Address</b>	<p>When information is not available in ERIE's policy processing system, default values display for locations with missing information.</p>
<b>Personal Injury Protection (PIP)</b>	<p>Details for this coverage are located at the policy coverage level, not at the vehicle coverage level.</p>
<b>Declaration (DSpro Documents Tab)</b>	<p>To verify the data that ERIE has downloaded, refer to the policy declaration. The declaration, either paper copy or online in the <b>DSpro Documents Tab</b>, shows the information that ERIE has on the system for each policy.</p> <p><b>Note:</b> To verify service fees and other accounting transactions, refer to the <b>DSpro Accounting Tab</b>.</p>
<b>ACORD Transaction Types</b>	<p>The following are the ACORD Transaction types that ERIE downloads:</p> <p>NBS – new business  RWL – renewal  PCH – policy change  REI – reinstatement  XLC – cancellation  RWX – Non-Renewal</p>
<b>ERIElink Download / ACORD File Creation</b>	<p>The batch process creates the ACORD files (personal lines and commercial lines) at the end of the ERIElink download cycle. If ERIElink does not complete successfully, the ACORD files may not have been created. Check your communications log to verify that the ERIElink download completed. If it did not, click the <b>Diskette</b> and <b>Apply Data Files</b>.</p> <p><b>Note:</b> If the ERIElink download cycle was interrupted and restarted, the ACORD transactions may be duplicated.</p>
<b>Directory Permissions</b>	<p>It is important that you set <b>read</b> and <b>write</b> permissions to the directory where the ACORD files are written. If you need assistance, contact your agency management system vendor.</p>



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