SmartLink for Pending Case Export
User Guide

SmartOffice®

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Introduction

Exporting pending case status to member agencies can be very difficult if those agencies use different Agency Management Systems (AMS). SmartLink for Pending Case Export (an add-on module to E-Z Data's SmartOffice®) gives you control over this process, enabling you to be more effective and productive, while helping you to better manage your member agencies. SmartLink for Pending Case Export provides the ability within SmartOffice to export pending case statuses to your member agencies through DataXchange Online. This export service has the ability to "push" a case that was entered into SmartOffice at the Main or CPU office out to your affiliate offices that are using different Agency Management Systems (AMS).

SmartLink for Pending Case Export creates an export file, which will be distributed to the member agencies' mailboxes. E-Z Data creates a mailbox for each member agency that signs up for the service that does not yet have a mailbox on the DataXchange Online server. It is then the responsibility of the various Agency Management Systems to retrieve the files from those mailboxes.

Requirements for Pending Case Export

- SmartOffice Online v5.0.2 Build #4311 or higher
- Register for SmartLink for Pending Case Export
- SmartCaseManager module
- Pending Case Export License Enabled
- Process HO Pending Case Status Information License Enabled
- Create Child offices for each member agency

Signing up for SmartLink for Pending Case Export

You must call your E-Z Data customer service representative at (800) 777-9188 and register for SmartLink for Pending Case Export before you can access this feature.

This feature is provided at two levels:

- Data Provider (BGA)
- Data Consumer (member agencies)

Please read below for further details.

Data Provider

Once you have completed signing up for SmartLink for Pending Case Export, E-Z Data's Implementation personnel will arrange to have the SmartLink for Pending Case Export adapter deployed on your SmartOffice server. This will require installing the adapter in your SmartOffice and assigning the appropriate rights to begin using SmartLink for Pending Case Export.

Data Consumer

If you are already signed up with the SmartLink for Pending Case Download and/or the SmartLink for Commission Download, you will already have a mailbox on the DataXchange Server. The same mailbox is used to send pending case status information to your member agencies.

Each member agency will be assigned a mailbox on the DataXchange Server. As pending cases are updated, an XML file in ACORD standard format will be created and sent to the member agency's mailbox awaiting pickup by their Agency Management System.

Child Offices for Member Agencies

For each of your member agencies that are signed up to receive pending case exports, a separate office should have been set up in SmartOffice. Their pending cases must reside in their respective office. The assigned mailbox will be specified in the office so that every time a pending case is updated it will be sent to the member agency's mailbox. This has already been set up by your System Administrator.

Setting up Enterprise View

As the Main or CPU office, if you would like to access the pending cases of your member agencies directly from your office, do so by turning on Enterprise View. This will enable the update of pending cases for all the member agencies that are set up as Child offices without logging out of your office.

To Turn on Enterprise View:

1. Click the **Enterprise View: On** hyperlink at the top right section of the SmartOffice Home Page to open the Change Enterprise View dialog box.

2. Select the **Log into an Office within your Hierarchy** option and then click the **OK** button.
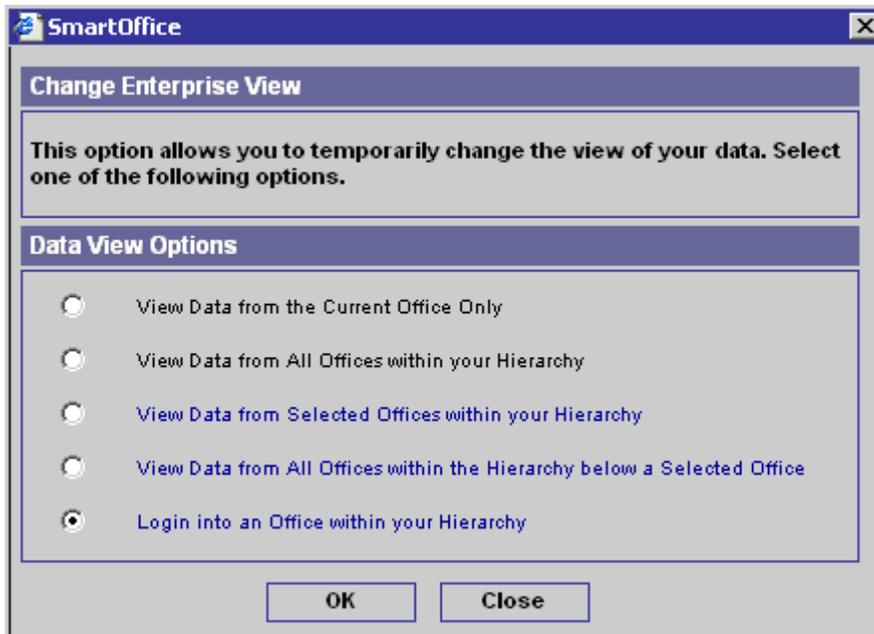
3. From the Search Office dialog box, enter the office name you would like to log into.
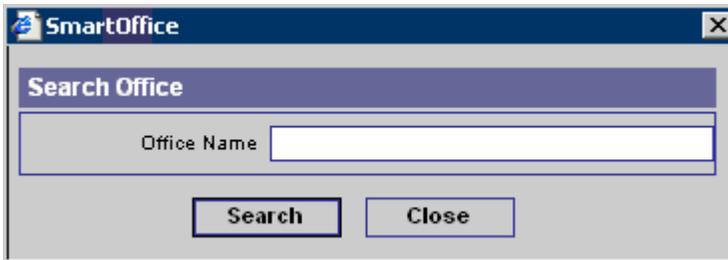
4. After the screen refreshes, you are logged into the Child Office in Impersonating Mode.

5. Select **View Data from All Offices within your Hierarchy** to return to Enterprise View ON mode.

6. Take the same steps above to log into other Child Offices.

Creating Route Files

Whenever member agencies sign up for SmartLink for Pending Case Export, you will need to update the route file after the system administrator has registered the mailboxes for the member agency. The route file is used by the DataXchange Server to route the pending case files to the appropriate mailboxes.

Notes:

- All member agency mailboxes must already be registered prior to creating the route file. For details, see the *Registering a Mailbox to a Member Agency* section in the *SmartLink for Pending Case Export Deployment Guide.*

- When a new member agency signs-up for SmartLink for Pending Case Export, you must create the route file again once their mailbox is registered; otherwise, they will not receive pending case status updates.

To Create a Route File:

1. Log in to the DataXchange Pending Case Export Admin Tool. E-Z Data will send you the login information to this tool, once your agency signs up for SmartLink for Pending Case Export.

2. To send pending case updates from the Main CPU Office (Parent office), select the **Do you want to include the parent office for exporting?** option.

   Note that an XML file will only be created and sent to a mailbox if you have also registered a mailbox for the Main CPU Office.

3. Click the **Create Route File** button. This will create the route file for the current offices that have registered the mailboxes.

   Congratulations! You can now update pending cases that will automatically be routed to the appropriate member agency mailbox.

Working with Pending Case Export

Once SmartLink for Pending Case Export is set up, you are ready to begin updating the pending cases in the Child offices that represent your member agencies. As you update pending cases for a Child office that represents your member agencies, the pending case will be exported to the specified mailbox in an ACORD XML standard file.

The following changes will trigger a pending case to be exported to the appropriate mailbox:

1. Receipt and processing of carrier download data.
2. Add or update of a requirement.
3. Add or update of a requirement note.
4. Change of pending case status.
5. Add or update of any pending case details (i.e., change of premium, change of mode).