

HO Pending Case Status Downloads Setup

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DataXchange Carrier Download Request Form

Step 1: Agency Request to Carrier for Download

Complete this form for **each** carrier from which you want to receive pending case data downloads. Fax or e-mail this form to the carrier using the contact information provided through the following link: http://www.smartofficeonline.com/partners/carrier_download.shtml

To Carrier: _____ Contact: _____

I authorize you to deliver status information associated with the applications that I have submitted to your company for underwriting under any of the contract identifiers that have been assigned to my agency. Please deliver this information to the E-Z Data, Inc. DataXchange service platform for subsequent delivery to me.

Agency Principal's Signature Date

Agency: _____

City: _____ State: _____ Zip: _____

Contact: _____ Phone: _____

E-mail Address: _____ Tax ID(s): _____

Step 2: Carrier Authorization to E-Z Data

To: **E-Z Data, Inc.** Contact: **Todd Cohen**
Fax: **(434) 522-4037** E-mail Address: **Todd.Cohen@ez-data.com**

Please perform the setup and configuration required to enable us to provide status information to the above referenced customer utilizing the DataXchange service platform. Please configure the agency's system to receive status on business associated with the following general agency contract ID(s):
Agency Contract ID(s): _____

Carrier Authorization Signature Date

Once the mailbox is created, please send the mailbox number to the following fax and/or e-mail address so we may update our routing table for the above noted agency.

Fax Number E-mail Address

Step 3: E-Z Data, Inc. Confirmation to Carrier

To Carrier: _____ Contact: _____

Re: DataXchange mailbox number: _____

This DataXchange mailbox is now available for use by the above referenced agency. You may initiate their download at any time.

E-Z Data, Inc. Authorized Signature Date

Sign-up

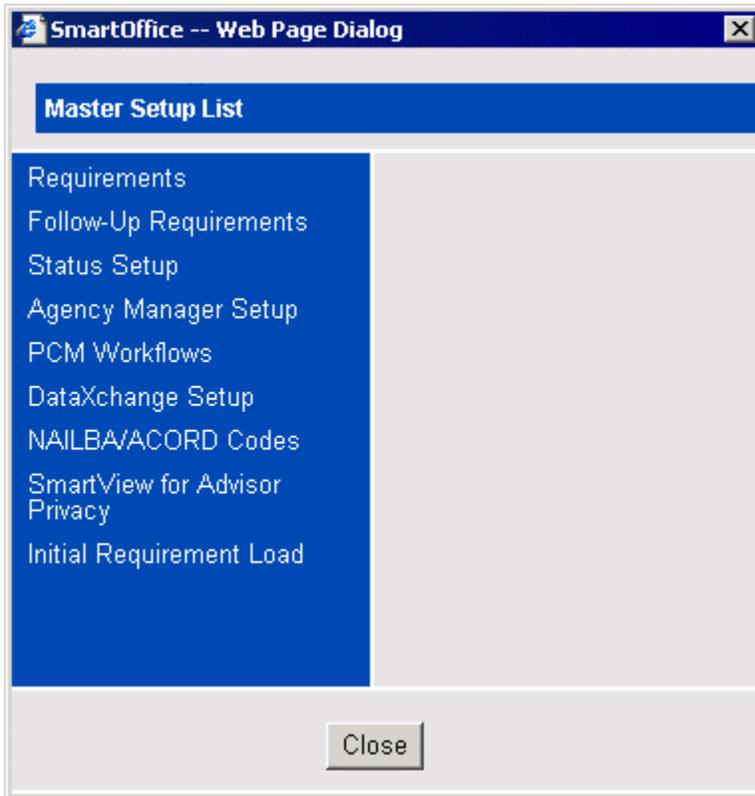
Please check our Web site at http://www.smartofficeonline.com/partners/carrier_download.shtml to see a list of participating carriers. Complete the form located on the previous page for **each** carrier from which you want to receive pending case data downloads. Fax or e-mail this form to the carrier using the contact information provided through the following link:

http://www.smartofficeonline.com/partners/carrier_download.shtml

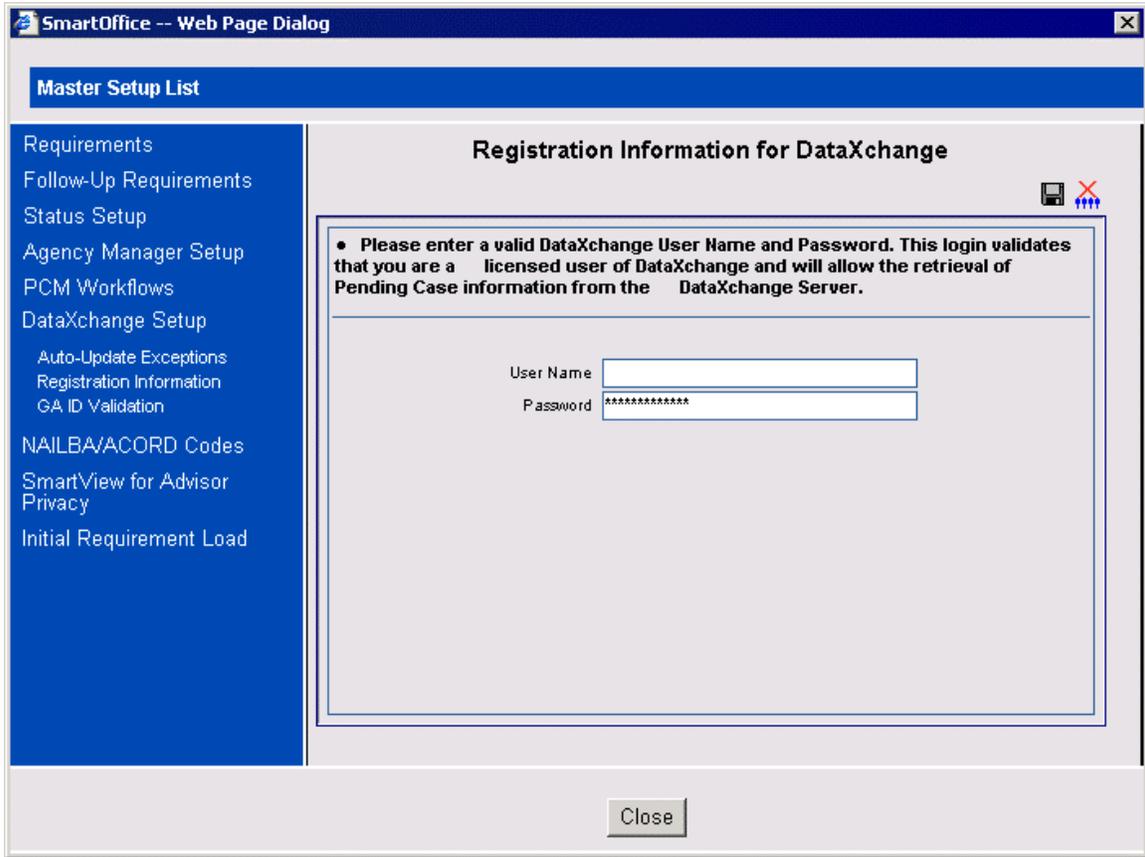
Also please let E-Z Data know through e-mail (todd.cohen@ez-data.com) that the request has been sent to the carrier(s). This will help ensure that the download is received on a timely basis. Once the carrier receives the request form they will notify E-Z Data.

Registration

Once the request with the carrier has been processed, E-Z Data will provide the DX Registration information. To enter DX Registration information, select the **Policy/PCM Setup** menu item and then select **Setup/Configuration** from the expanded list to open the Master Setup List dialog box. Note that only Admin users can access this section of the Master Setup List.

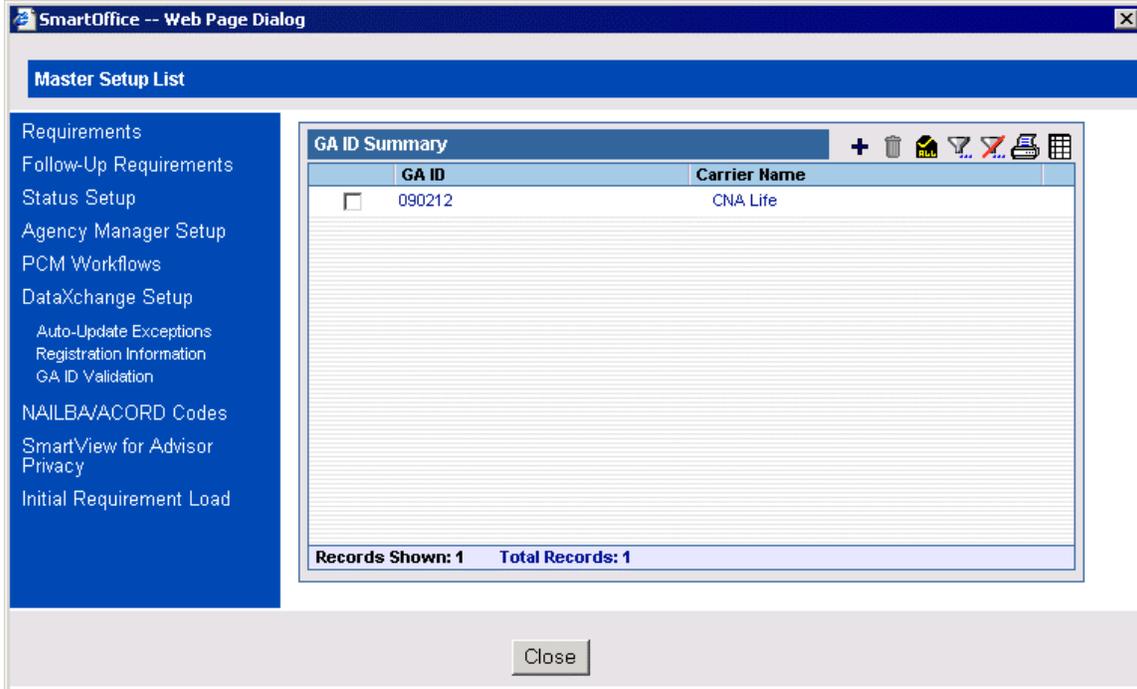


From the Master Setup List, select the **DataXchange Setup** menu item and then select **Registration Information** from the expanded list. Enter the Mailbox # in the **User Name** field and the Password in the **Password** field. Click the **Save** button to save the registration information.

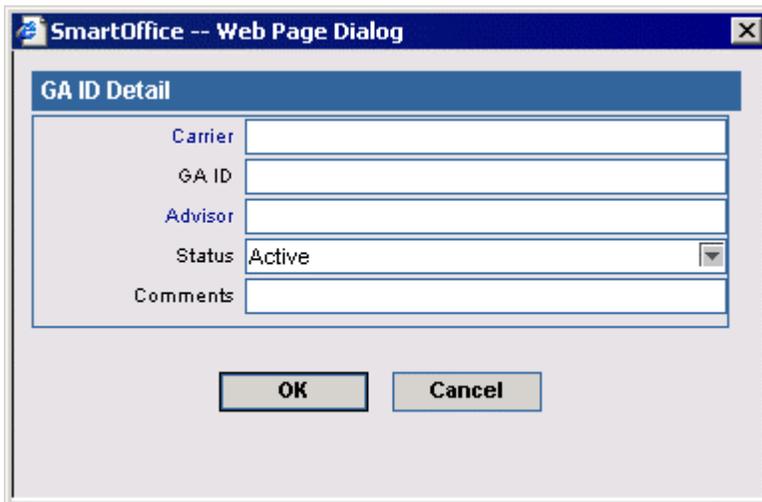


GA IDs

The carrier provides the GA ID information. From the Master Setup List, select the **DataXchange Setup** menu item and then select **GA ID Validation** from the expanded list to open the GA ID Summary.



Click the **Add** button to open the GA ID Detail dialog box. Enter the Carrier and the associated GA ID and then click **OK**.



Carrier ID

Carrier Name	Carrier ID
American General Life	AIGAG
American Mayflower Life of NY	AML
Banner Life Insurance Co.	BANNR
Valley Forge Life Insurance Co.	CNAIC
Companion Life Insurance Company	COLIF
Empire General Life Assur. Co.	EGL
First Colony Life Insurance Company	FCL
First Penn Pacific	FPPTB
GE Capital Assurance	GECA
GE Long Term Care	GELTC
Lincoln Life Insurance and Annuity Company of New York	LLANY
Lincoln Life	LLCTB
GE Life and Annuity Assurance Co.	LOV
MONY Life Insurance Company of America	MONY
Nationwide Life Ins. Companies	NWLIC
Principal Financial Group	PFG
Prudential Select	PRUSL
United of Omaha Life Insurance Company	UNOMA
William Penn Life Ins Co of NY	WPENN

From the Home Page of SmartOffice, select the **Policy/PCM Setup** menu item and then select **Carrier Search** from the expanded list to open the Search Insurance Carriers dialog box.

The screenshot shows a web-based dialog box titled "SmartOffice -- Web Page Dialog". The dialog is titled "Search Insurance Carriers" and contains the following elements:

- A text input field labeled "Carrier Name".
- A section titled "Set" with a text input field labeled "Set".
- Three buttons at the bottom: "Search", "Add", and "Close".

Click **Search** to open the Carrier Summary. Tag the appropriate carrier and then select the **Detail** tab to bring it to the forefront. Click the **Switch to Edit Mode** button. Type the Carrier ID into the **Carrier ID** field and then click the **Save** button.

Carrier - ABC Life











[Summary](#) | [Detail \(P\)](#) | [Misc Information \(X\)](#) | [Key Relations](#) | [PCM Options](#) | [Product \(B\)](#) | [Group Product](#) | [Ind. Policy](#) | [>>](#)

Basic Information		Phone Numbers										
Name: ABC Life Abbreviation: <input type="text"/> NAIC ID: <input type="text"/> Primary Contact: Monica Scott Carrier ID: <input type="text"/> Age Calculation: <input type="text"/> Age Last <input type="checkbox"/> No PCM Activity		<table border="1"> <thead> <tr> <th>Full Phone</th> <th>Remarks</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> (323) 466-8989</td> <td></td> </tr> <tr> <td><input type="checkbox"/> (323) 466-8910</td> <td></td> </tr> </tbody> </table>		Full Phone	Remarks	<input type="checkbox"/> (323) 466-8989		<input type="checkbox"/> (323) 466-8910				
Full Phone	Remarks											
<input type="checkbox"/> (323) 466-8989												
<input type="checkbox"/> (323) 466-8910												
DataXchange/Resource Data Options		Addresses										
Download Method: <input type="text"/> Direct Download and Replace Tolerance: <input type="text"/> (Days) For Matching Requirements Download Status: <input type="text"/> Sequence No: Cross Reference: App Upload Svs:		<table border="1"> <thead> <tr> <th>Street</th> <th>City</th> <th>Map</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> 950 S. Pepper St</td> <td>Los Angeles</td> <td></td> </tr> <tr> <td><input type="checkbox"/> 123 S. Main</td> <td>Los Angeles</td> <td></td> </tr> </tbody> </table>		Street	City	Map	<input type="checkbox"/> 950 S. Pepper St	Los Angeles		<input type="checkbox"/> 123 S. Main	Los Angeles	
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