



Details on Ivans Download

What Is Ivans Download?

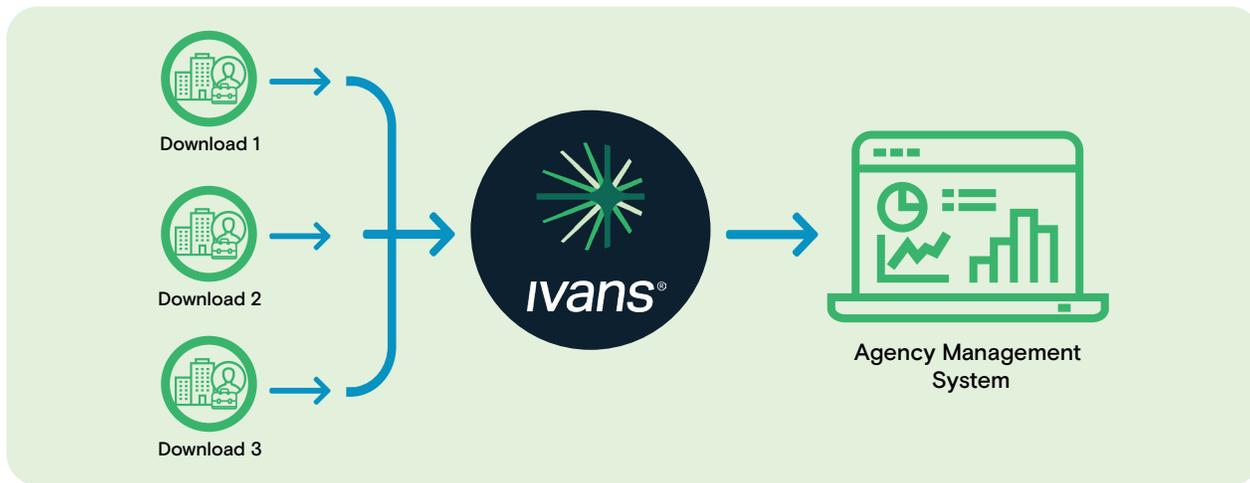
Ivans Download™ streamlines the exchange of policy-related information, ensuring that you have immediate access to the most current data while servicing clients. This automated solution allows you to access policy information and documents directly within your management system, eliminating the need to manage paperwork or request information from individual carriers. By providing you with up-to-date information at the point of service, Ivans Download enhances your overall customer experience.

Key features of Ivans Download include:

- 1. The Ivans Network and Ivans Exchange™** — Includes access to the carrier reference document that lists which carriers support download, book roll and market appetite powered by Ask Kodiak®. The download contact information is either a hyperlink in your Connections Report or may be secured by contacting Connections@Ivans.com.
- 2. Carriers and Codes** — Ivans stores the downloaded agency contract codes in this section and allows you to add all the carriers with whom you are appointed to write policies. [Watch this video](#) to learn about carrier and code configuration.
- 3. Ivans Market Appetite, Powered by Ask Kodiak** — If you need to determine if a carrier has the appetite for your commercial risk, Ivans Market Appetite® provides functionality that allows you to search the database and prioritize the ranking of your carriers whose results are returned.
- 4. Grouping Ivans Y-Accounts** — This feature allows agencies with multiple Ivans Y-Accounts to consolidate all accounts into a single login. To learn more about Ivans Exchange™ groups, [watch this video](#) or contact Connections@Ivans.com.
- 5. Ivans Bookroll** — When you need to roll a book of business from one carrier to another, Ivans Bookroll™ streamlines the process. To learn more about Ivans Bookroll, [watch this video](#) or contact Connections@Ivans.com.

Receiving Downloads from Carriers through Ivans

After you have bound your client's insurance policy, the policy declaration, supporting data, and documents can be downloaded to your agency management system through the Ivans Network. "Download" is sharing the information in the carrier's database with your agency management system. The Ivans Network provides an efficient, safe environment for the industry to share data and documents.



The carrier's downloaded files are delivered to your Ivans "mailbox." The carrier knows it is your "mailbox" based on the Ivans Y-Account you have been assigned.

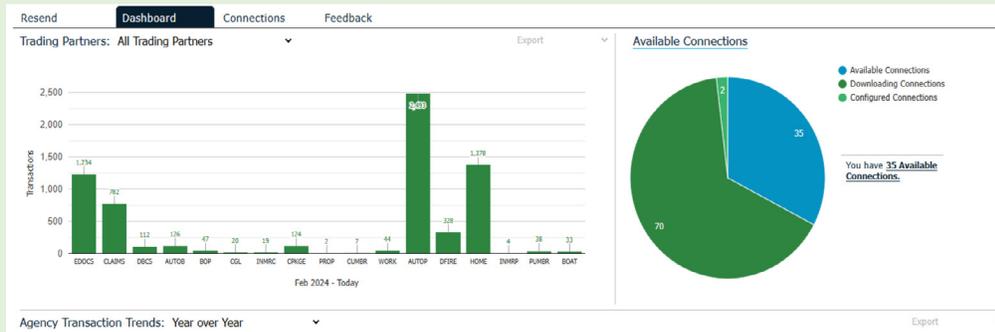
Ivans Y-Accounts are identified with a unique 4 or 5-digit alpha/numeric code beginning with "Y" (ex: YAB1D).

Carriers may download files once a day or continuously throughout the day. This saves you time, as no follow-ups are needed. It becomes a one-and-done, immediately completed workflow, allowing independent agents to compete with captive agents.

How do I know what download is going through Ivans?

Ivans offers a complimentary service called **Ivans Exchange™**, which provides information about your agency's downloads via the Ivans Network. To access your agency's information, you must have an Ivans Y-Account and be signed-in to **Ivans Exchange**.

To get an overview of your agency's download status, log on to Ivans Exchange and check the Dashboard.



The Trading Partners section displays your download activity based on transaction volume and line of business over the past 12 months.

The pie chart visually represents the status of your downloads:

- Currently Processing (Downloading Connections) – Dark green
- Pending Your Agency Writing a Policy (Configured Connections) – Light green
- Potentially Available to Your Agency (Available Connections) – Blue

How do I change the blue to dark green to activate my download?

To ensure you're accessing all available downloads for your agency, click the "Connections" tab at the top of the screen under your agency's name. Alternatively, you can select the link that says, "You have XX Available Connections" next to your pie chart.

Your Connections Report displays. It shows the carriers your agency is connected to and the details for which lines of business or download type.

1. Download Totals and monthly notifications "Clock" - email notification on the first Monday of the month.

2. "Available" = potentially available download. Your goal is for this to be zero. Learn why and how to do this.

3. Carriers - Click on their name for a Hyper link to Carrier contact info and download notes. Or the Ivans Carrier Partners reference Guide to learn more about all the carriers.

4. Need assistance - Ivans provides complimentary assistance.

How do I add carriers to my Ivans Y-Account?

Contact your carrier and provide them with your Y-Account, mailbox, and IBM address. Specify the types of downloads you wish to receive. Additionally, ensure that your management system is configured to accept downloads.

How do I read my Connections Report?

The Connections Report is an online report that provides details about:

- Downloads (DL): These are the items you have successfully received in the past 12 months.
- Pending Items (SC, CC, or C): This indicates that we believe a download is still pending. This status will remain until you write the type of policy, at which point the download will begin.
- Available Downloads (A): This indicates that a download is potentially available from a specific carrier. You must be appointed to write that line of business with the carrier in your state. Click the carrier's name to see if there are any instructions on how to activate your download. If no instructions are provided, please indicate that you "Want" the download.

Check out the [Ivans Product Release Hub](#) for the latest updates, news, and products.