

# IS YOUR AGENCY AUTOMATION IN ORDER?

## YOUR AGENCY DIGITAL CHECK UP

### Accounting Download

Direct Bill  
Payroll Billing

### Policy Download

Business Owner's Policy (BOP)  
    Audit final/revised transactions  
  
Workers' Compensation  
    Audit final/revised transactions  
  
Business Auto  
Personal Auto  
Home

### Claims Download

Claims



**SCAN HERE** to  
log in to your  
AMS Dashboard.

[https://agency.thehartford.com/  
agency/ams-automation](https://agency.thehartford.com/agency/ams-automation)

### ACORD eDocs and Messages

Business Insurance Policy eDocs  
    Include all Business Insurance  
    eDocs  
  
Bond Policy eDocs  
  
Billing Messages for Personal and  
Business Insurance  
  
Audit Messages



All your producer codes  
are enabled. Automatically  
register new producer codes.

Check for System Alerts on  
the Automation Dashboard.

Your AMS system information  
is correct in Ivans.

Everyone has their own EBC ID.

Check FAQs for additional  
information.



## OUR AUTOMATION CAPABILITIES – AT A GLANCE

**Software solutions** enable real-time connectivity and processing support between The Hartford and the majority of the most common agency management systems.

**Endorsement upload** speeds policy endorsement processing. You start the change in your Applied or Vertafore AMS<sup>1</sup> and then bridge into the EBC endorsement forms to complete the transaction. It's that easy.

**Download program** enables the download of the following policy data into your AMS:

- Commercial and personal lines policies
- Claim information
- Direct bill commission statements

**ACORD eDocs and Messages** enable the download of:

- Policy documents (PDF format) for commercial business
- Estimated audit messages

- Premium audit messages
- Bond policy documents (PDF format)
- Billing alerts into your “Messages”

Also take advantage of the Policy Resend feature by using the **Download Resend Tool** on the EBC agent portal or the Ivans Single Policy Resend capability.

**eServices** lets you:

- View billing information and get copies of bills
- Make a payment
- Perform claim and policy view inquiries
- Access loss runs
- Access the EBC agent portal

**ICON Bridge** makes it easy to get a quote for a new customer, remarket existing clients or take advantage of consolidation opportunities.

**ELIMINATE TIME-WASTERS.  
TAKE ADVANTAGE OF OUR TIME-SAVING AUTOMATION CAPABILITIES.**

<sup>1</sup> Currently only available for Applied and Vertafore; will be available for additional agency management systems in the future.



Property  
Liability  
Workers' Comp  
Business Auto