Coterie Insurance is excited to announce that we are working with Ivans to offer business owners and general liability (professional liability on the way!) commercial policy data downloads directly to your agency management system. You will be able to transfer policy data in minutes, making your day to day operations easier, and much more efficient.

What is Commercial Lines policy download?

- Commercial Lines policy download is an automated process that allows Coterie Insurance users to download all policies written via Coterie directly to your agency management system (AMS).

- This feature enables the electronic transmission of insurance transactions in ACORD standards to drive agency efficiency and reduce errors and omissions exposure.

- The following types of transactions are available via Commercial Lines policy download: New Business (NBS), Renewal (RWL), Policy Change (PCH), and Cancellation Confirmation (XLC). We are working on eDocs download and Commissions download to be available in 2023.

What types of Ivans Download does Coterie Insurance currently support?

Currently, Commercial Lines policy download is available for certified Agency Management Systems (see last page), we are working on eDocs download and Commissions download to be available in 2023.

How do I get started with Coterie sending policy information to my AMS?

1. Contact your agency management system vendor to make sure your system is configured correctly to receive Ivans Download.
2. Once confirmed from your AMS, please fill out this registration form. We will send an email confirmation when you are enabled! Please allow up to three business days from the registration date.
3. You will need to have your Ivans account number (Y-Account) and the below Coterie information.

Origination Address: IBM513COTERI

NAIC codes:

- 24376C – Spinnaker Insurance Company
- 15563C – Clear Spring Property and Casualty Insurance Company
- 41394C – Benchmark Insurance Company
- 24961C – Everspan Insurance Company
- 24295C – Providence Washington Insurance Company

NAIC codes for Applied AMS only:

- 24376 – Spinnaker Insurance Company
- 15563 – Clear Spring Property and Casualty Insurance Company
- 41394 – Benchmark Insurance Company
- 24961 – Everspan Insurance Company
- 24295 – Providence Washington Insurance Company

Will I receive an initial policy load after registering?

At this time, we will not be sending an initial policy load. You will begin receiving new transactions as soon as your registration is complete.

How does Ivans Download work?

Coterie sends transactions in real time to Ivans. Ivans will then process the downloads sent twice daily (12pm and 10pm ET) where completed transactions will then be placed in your agency Ivans mailbox. Ivans will transmit all post-bind policy, endorsement, and renewal meta-data and PDF files. This feature enables the electronic transmission of insurance transactions in ACORD-compliant formats.

Are there any costs to my agency to enable Ivans Download?

There is no cost to you to enroll in Ivans Download. We listened to you, this was one of the most requested features. It is one of the value-added services Coterie Insurance offers our agents and partners.

If I am having trouble with Ivans Download, who should I contact?

- Your first level of assistance is your agency management system vendor. They will handle any troubleshooting. See below for agency management system vendors.
- Ivans Connection Team: connections@ivans.com.
- Coterie Insurance Customer Support: 1-855-566-1011 or support@coterieinsurance.com

Why didn't I receive an Ivans Download file today?

Here are a few common reasons why you may not have received an Ivans Download file:

- No activity within Coterie Insurance

- Files are available on or around 12pm and 10pm ET

- If you believe there is a technical issue, please contact your agency management system vendor. They will handle any troubleshooting.

Are all producers at my agency enabled with this?

We enable the data at the agency level. We send data to an Agency mailbox which then populates into the Producers AMS based on how they have that system configured.

What lines of business does Coterie offer this service for?

Business owners and general liability commercial policy data downloads will flow directly to your agency management system. Professional liability will be available sometime in 2023.

Can I only receive specific policies via Ivans Download?

Once activated you will receive all business owners and general liability commercial policies for the enabled agency. You are not able to specify which policies.

What exactly is the Ivans 'Y-Account'?

This is a unique five digit code that Ivans provides every agency at time of registration. In order to pass IVANS Download files to our users, we're required to match your agency's producer code to its IVANS Y-Account for each policy issued.

Agency Management Systems Certified for Ivans Download

✓ = Ready ! = In process of being certified

Company	Agency Management Systems	BOP	CGL
Agency Advantage	The Agency Advantage	!	!
Agency Software	Agency Pro	✓	✓
Agency System	Newton	✓	✓
Applied	Applied DORIS	✓	✓
	Applied Epic	✓	✓
	Applied TAM	✓	✓
	Applied Vision	✓	✓
	Applied CanaryAMS	✓	✓
Ebix	EbixASP	!	!
Evolution	eVo	!	!
HawkSoft	HawkSoft	✓	✓
ITC	ITC: InsurancePro	!	!
Jenesis	JenesisClassic	✓	✓
	JenesisNow	✓	✓
NASA	NASA Eclipse	✓	✓
Novidea	Novidea	!	!
NowCerts	NowCerts	✓	✓
Quomation	PowerManage from Quomation	✓	✓
Record Guardian	Record Guardian	✓	✓
SIS Partner XE	Partner Platform	✓	✓
Special Agent	Special Agent	✓	✓
Vertafore	Vertafore AMS360	✓	✓
	Vertafore Sagitta	✓	✓
	Vertafore QQCatalyst	✓	✓
Webcetera	EZLynx	✓	✓
XANATEK	XANATEK	✓	✓
XDTI	Nexsure	!	!

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