

# AMS Integration

## Frequently Asked Questions

*Save time and instantly serve your clients!*

### 1. WHAT IS UPLOAD?

A term used to describe the transaction of information from your agency management system to us (the carrier) so you can get a new business quote without having to leave your system. To upload, data from your system can be electronically sent over what's often referred to as a "bridge," which saves you time by eliminating the need to re-key data.

### 2. WHAT IS POLICY, CLAIMS AND BILLING INQUIRY?

Inquiry allows you to instantly request and receive the policy, claims and billing data for your client without having to leave your system. It provides a view or snapshot of information directly from our system.

### 3. WHICH AGENCY MANAGEMENT SYSTEMS CAN BE USED?

- a. Applied Systems – Transformation Station (TAM, EPIC, Doris)
- b. Vertafore Systems – TransactNow (AMS360 and Saggita)

### 4. ARE THERE ANY COSTS INVOLVED WITH THESE CAPABILITIES?

No, there are no additional costs to your agency if you are currently set up to Upload and Download with carriers in your agency management system.

### 5. DO I NEED TO HAVE AN IVANS ACCOUNT?

Yes. Your Applied or Vertafore agency management system utilizes an IVANS Y account, and you will need that number to access these capabilities. The "Y" is a unique identifier used by carriers who download through IVANS.

### 6. HOW DO I GET SET UP TO DO UPLOAD AND DOWNLOAD WITH MEM?

Please contact us at 1.800.442.0590, Ext. 2354, and we can help you get set up. To do this, we will need the following information:

- a. Agency Name
- b. Address
- c. Phone
- d. Producer Code
- e. Agency Management System and Version
- f. Y Account

### 7. WHAT SHOULD I DO WITHIN MY AGENCY MANAGEMENT SYSTEM TO GET STARTED?

To get started, there are two things you need in place:

- a. Run an Account Update and assign MEM as the applicable company code. Your Agency Admin or IT Specialist will likely need to run this update for your agency management system.
- b. Once you run the update, put in your MEM credentials to complete your individual set up under Local Security.

### 8. IF I AM HAVING TROUBLE, WHOM DO I CALL FOR SUPPORT?

Your first level of assistance is your agency management system vendor. They may help you with troubleshooting. MEM can be reached from 8 a.m. to 4:30 p.m. at 1.800.442.0590, Ext. 2354.

#### IVANS Connection Team:

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