

PDF Application Uploader Now Available for Commercial Lines New Submissions

To save time on entering new Commercial Lines submissions, we now offer the ability to upload PDF ACORD applications into our iBIS policy system.

This automated process will create the submission and prefill the data provided on the application. Current products that can be uploaded include commercial (property and general liability), commercial auto, and workers compensation.

From iBIS Agency Services, under the Services tab, select Policy, and Create New Submission. Under Commercial Lines, there is now an additional option "Upload PDF Application." Once the account holder and legal entity is entered, the typed PDF ACORD application can be selected and uploaded. Additional attachments can also be uploaded to the account, such as driver lists, photos, schedules, and other file documentation.

When the PDF application has been submitted, an email confirmation will be sent to the submitting user with notification of the upload status. This email will also provide a link to the policy system to access the submission, complete the remaining entry, and begin the quoting process.

Step-by-step instructions and helpful hints for successful application uploads can be found in iBIS Agency Services by selecting Resources, then Agency Education, and selecting the Uploading a PDF Application document under Commercial Lines Policy System Job Aids.

To register for an upcoming agency demonstration webinar, please select one of the links below:

Wednesday, January 26, 2022, at 10 a.m.

Tuesday, February 1, 2022, at 2 p.m.

We hope this new feature will contribute to entry efficiency of new Commercial Lines submissions. If you have any questions, please contact Automation Support at 800-234-1133, ext. 3000.