PDF Application Upload: A Tool Designed to Save You Time

Have you tried the PDF ACORD application upload feature in the iBIS policy system? If not, consider trying it today! This tool was designed to save you time when entering data for Commercial Lines submissions.

This automated process seamlessly creates new submissions by prefilling 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, select Upload PDF Application. Once the account holder and legal entity are entered, the typed PDF ACORD application can be uploaded. Additional attachments can also be uploaded to the account, such as driver lists, photos, schedules, and other file documentation.

Helpful hints:

- Always have an effective/expiration date filled out.
- Do not use the mailing address on the ACORD, use the primary location address instead. There is a section to enter the mailing address after you upload the ACORD.
- A federal tax identification or social security number is required for validation purposes.

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. A training video is also available for reference.

If you have any questions or would like a demo, please contact Automation Support at 800-234-1133, ext. 3000, or agencyservices@fmins.com.