**Chubb Group of Insurance Companies**
Warren, New Jersey  07059
http://www.chubb.com

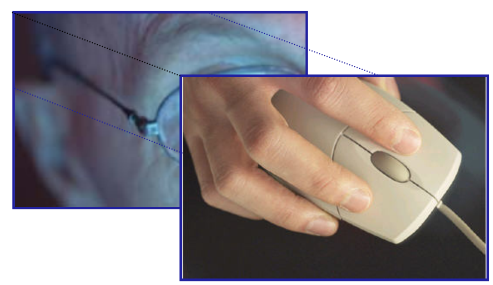
form 21-10-0625 (Rev -7/2010)



# Agency

# Administrator

# User's Guide



## Records

| Agent | Producer Numbers | Roles |
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# Chubb's Online Enrollment System

## Introduction

***What is the enrollment system?***
Chubb's enrollment system provides a fast and easy way for agency employees to obtain User IDs for Chubb's secure Internet platform, referred to as @chubb.

Each agency will designate an Agency Administrator who will have the authority to request new User IDs, revoke existing IDs and perform other User ID maintenance functions.

This brochure explains and illustrates each of the User ID enrollment functions to which the Agency Administrator has access.

***How does the enrollment process work?***
When the Agency Administrator requests a User ID via the Online Enrollment system, a message is sent to the local Chubb branch office, where the Marketing or Branch Assistant will obtain the necessary approval. Approvals are confirmed via a return email to the Agency Administrator with the new user's ID. A separate email is sent to the new user that contains the password required for system access.

We expect that the approval process should take no longer than two business days. A confirmation letter with the new User ID and password is mailed via US Postal Service. You may also call your branch for special situations.

The Agency Administrator also has authority for revoking User IDs in situations, namely when individuals leave the employment of the agency. This takes effect immediately and is an important aspect of the Agency Administrator's responsibility.

## Access

**What does the @chubb platform allows your agency employees to access?**

**Everyone has access to:**

- Claims CheckView
- Claims Details Inquiry
- Chubb News
- Loss Scenarios
- Preferred Vendor Network

**Agency Principals have access to:**

- All products offered to Personal Lines Agent Leader.
- All products offered to Commercial Lines Agent Leader.
- All products offered to Accounting Specialist

**Agency Licensing Contacts have access to:**
Producer Appointment Express

**Personal Lines Agents have access to:**

| | Agent / CSR | Agent Leader |
|---|---|---|
| CPI Banner Ad | √ | √ |
| Download Central | √ | √ |
| Masterpiece Manuals | √ | √ |
| My Policies | √ | √ |
| PL Agent Connection | √ | √ |
| PL Policy Transactions “Masterpiece Real-Time” | √ | √ |
| PL Policy & Claims Activity “My Alerts” | √ | √ |
| Monthly Commission Summaries | | √ |

**Agency Claims Contacts have access to:**
PL Claims Activity “My Alerts”

**Agency Principals have access to:**

- All products offered to Personal Lines Agent Leader.
- All products offered to Commercial Lines Agent Leader.
- All products offered to Accounting Specialist.

**Agency Licensing Contacts have access to:**

- Producer Appointment Express



## Obtaining Help

A confirmation is required after each address to ensure accuracy.
If you have any problems accessing or using **@chubb**, please contact us at:

Personal Lines
Chubb Customer Care Team
1-866-324-8222
Email: customercare@chubb.com

Commercial Lines
Call eBusiness Help Desk
1-877-747-5266
Email: atchubb-support@chubb.com

## Special Notes:
## Defining Agency Preference (Personal Lines Only)

**Introduction**
Completing this section of the enrollment system allows Chubb to send information that you want to see at the location you want to receive it. In addition, it may allow Chubb to co-brand our online services with you agency providing seamless customer service to your clients.

The following information is completed (if available) about your agency:

- Email address
- Web site address
- Logo
- Communication preferences (kinds of Chubb communications desired)
- Email address from communications





**Personal Lines Agents have access to:**

| | Agent / CSR | Agent Leader |
|---|---|---|
| CPI Banner Ad | √ | √ |
| Download Central | √ | √ |
| Masterpiece Manuals | √ | √ |
| My Policies | √ | √ |
| PL Agent Connection | √ | √ |
| PL Policy Transactions “Masterpiece Real-Time” | √ | √ |
| PL Policy & Claims Activity “My Alerts” | √ | √ |
| Monthly Commission Summaries | | √ |

**Agency Claims Contacts have access to:**

- PL Claims Activity “My Alerts”

**Commercial Agents have access to:**

| | Agent | Agent Leader |
|---|---|---|
| Builders Risk | √ | √ |
| Business Direct Bill | √ | √ |
| Business Loss Runs | √ | √ |
| Business PolicyView | √ | √ |
| Cargo Certificate Issuance | √ | √ |
| Commercial Property Valuation | √ | √ |
| Contractors’ Equipment Express | √ | √ |
| Customarq Classic Policy Forms | √ | √ |
| EPL Loss Prevention Services | √ | √ |
| Life Sciences Forms | √ | √ |
| Life Sciences Wizard | √ | √ |
| Technology E&O “Smart App” | √ | √ |
| WORLDcert Clinical Trials Certificate Issuance | √ | √ |
| Monthly Commission Summaries | | √ |

**Accounting Specialists have access to:**

- Business Policy View
- Commercial Direct Bill
- Commercial/Personal Monthly Commission Statements
- Direct Deposit of Commissions
- My Policies

## Introduction

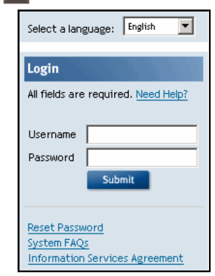
A User ID and Password are necessary in order for any individual to access the @chubb platform. You request this through Chubb's Online Enrollment System. It's easy and it's fast. The following procedure and step-by-step detail tells you how it is done.

### How to Login

1. Open Internet Explorer and type: [www.chubb.com](http://www.chubb.com)
2. Click 


   *The @chubb login window displays.*

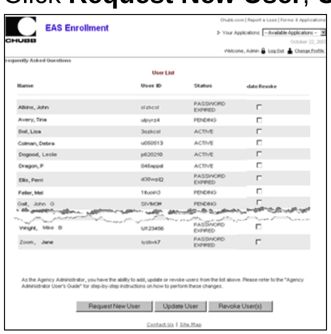
3. Type your User ID and Password in the fields provided and click 


*The main window displays.*

4. Click **Administer a Chubb System**.
5. Click **Administer Access to @chubb**.
6. The **Request New User**, **Update User** or **Revoke User(s)** window displays. (See buttons at the bottom of the page)

   Click **Request New User**, **Update User** or **Revoke User(s)**.




See specific procedures for each in the remainder of this booklet.



## Revoking a User(s)

If you want to know about

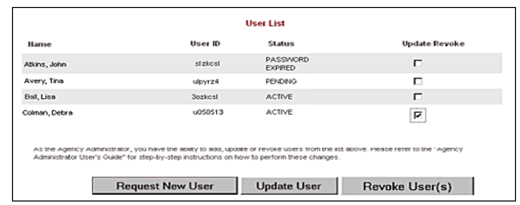
- Revoking
- Why you would want to revoke a user
- How to revoke a user(s)

### Introduction

Revoking a user(s) means that you no longer want this person to have access to the Chubb tools. There are many reasons for revoking someone. For example, the person has left the agency, or been given other responsibilities, etc. Regardless of the reason, the process for revoking a user is the same.

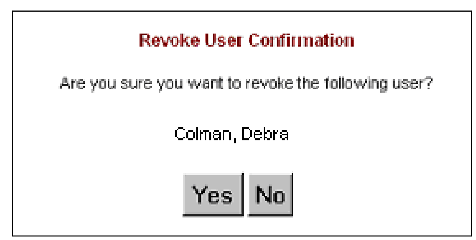
### Revoking a User(s) Procedures

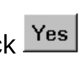
STEP 1 Click the **Update/Revoke** column and put a  (check mark) in the box to the right of the user who requires updating.




STEP 2 Click 


The following **Revoke User Confirmation** message displays.

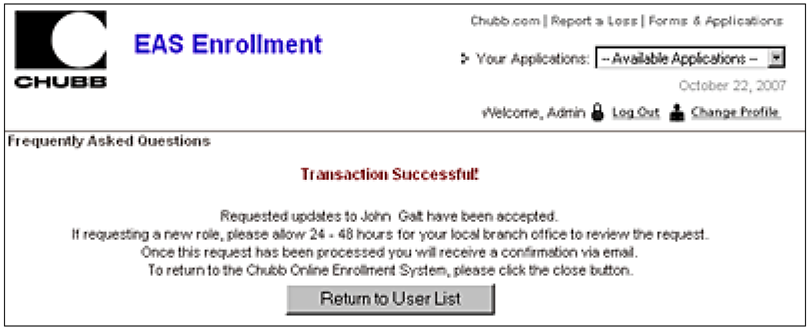



STEP 3 Click 


The **User List** displays.

## Updating a User Procedure

STEP 6 Click Update User
The **Transaction Successful** message displays.




Click Return to User List.
A list of users including the one updated displays.



## Procedures for Requesting a New User

STEP 1 Click Request New User
The **Request for New Account** window displays.

New User Information Steps 2 - 7

STEP 2 Click **First Name** field and type the user's first name.
Maximum is 20 characters.

STEP 3 Click **Last Name** field and type the user's last name.
Maximum is 20 characters.

STEP 4 Click **Email Address** field and type the user's email address.
*TIP*: This is a required field and must be completed.

STEP 5 Click **Confirm Email** field and type the same Email address again.

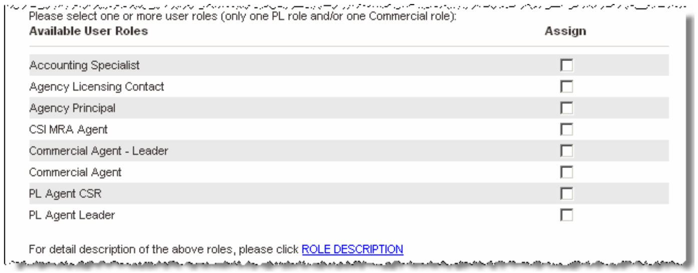
STEP 6 **Business City**
Click **Business City** field and type the user's business city. Maximum is 20 characters.

STEP 7 **Business State**
Click **Business State** field and type the user's business state. Maximum is 20 characters.

STEP 8 **Role Description**

Click the **Assign** column and put a ☑ (check mark) in the box to the right of the **Role** the user desires. Minimum is one role or access (or one check mark).

Role Description Step 8



Please select one or more user roles (only one PL role and/or one Commercial role):

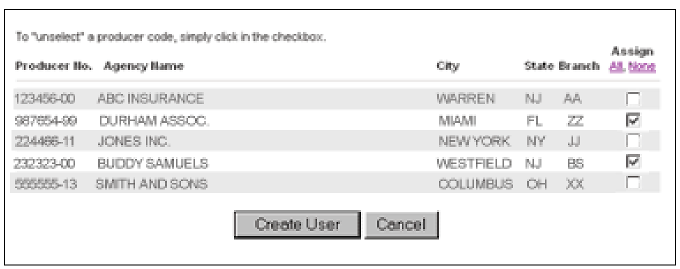
| Available User Roles | Assign |
|---|---|
| Accounting Specialist | ☐ |
| Agency Licensing Contact | ☐ |
| Agency Principal | ☐ |
| CSI MRA Agent | ☐ |
| Commercial Agent - Leader | ☐ |
| Commercial Agent | ☐ |
| PL Agent CSR | ☐ |
| PL Agent Leader | ☐ |

For detail description of the above roles, please click ROLE DESCRIPTION

STEP 9 **Select Producer Numbers**

Click the **Assign** column and put a ☑ (check mark) in the box of the **Producer Number** the user desires. At least one **Producer Number** must be selected. You may select "**All**" to select all producer numbers or "**None**" to clear all checkboxes. To "unselect" a producer code, simply click in the checkbox already checked.

Producer Number Information Step 9



To "unselect" a producer code, simply click in the checkbox.

| Producer No. | Agency Name | City | State | Branch | Assign All, None |
|---|---|---|---|---|---|
| 123456-00 | ABC INSURANCE | WARREN | NJ | AA | ☐ |
| 987654-99 | DURHAM ASSOC. | MIAMI | FL | ZZ | ☑ |
| 224466-11 | JONES INC. | NEW YORK | NY | JJ | ☐ |
| 232323-00 | BUDDY SAMUELS | WESTFIELD | NJ | BS | ☑ |
| 555555-13 | SMITH AND SONS | COLUMBUS | OH | XX | ☐ |

Create User | Cancel

***Tips:***

Multiple Personal Lines roles cannot be selected for the same person.

Clicking ROLE DESCRIPTION provides an online description of each role. This can help you decide which role(s) to assign a new user.





STEP 3 **DETERMINE…**

| **If you are** | **Then** |
|---|---|
| Changing/adding Roles | Proceed to Step 4 |
| Changing/adding Producer Code Numbers | Proceed to Step 5 |

STEP 4 **DETERMINE…**

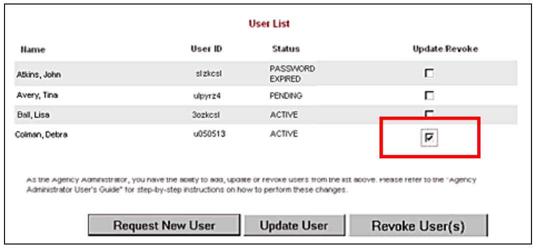
| **If you are** | **Then** |
|---|---|
| Adding a Role | Click the box in the **Assigned** column that is associated with the desired role, a ☑ (check mark) displays in the box. Proceed to Step 6. |
| Deleting an existing Role | Click the existing ☑ (check mark) in the **Assigned** column associated with the Role to be deleted. Proceed to Step 6. |

STEP 5 **DETERMINE…**

| **If you are** | **Then** |
|---|---|
| Adding a Producer Code Number | Click the box in the **Assigned** column that is associated with the desired Producer Code Number, a ☑ (check mark) displays in the box. Proceed to Step 6. |
| Deleting an existing Producer Code Number | Click the existing ☑ (check mark) in the **Assigned** column associated with the Producer Code Number to be deleted. Proceed to Step 6. |

## Updating a User Procedure

STEP 1 Click the **Update/Revoke** column and put a ☑ (check mark) in the box to the right of the user who requires updating.

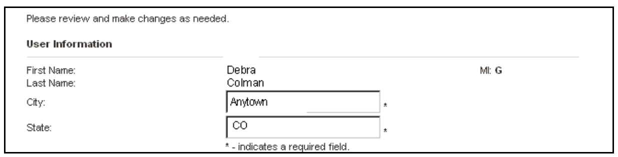



STEP 2

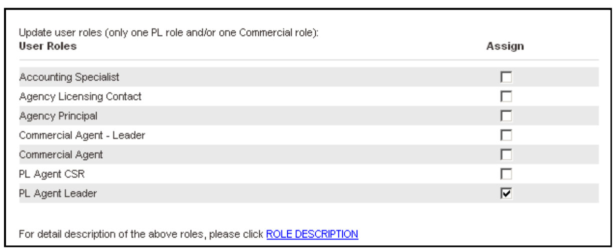
Click Update User

The **Update User** window displays for the selected person.

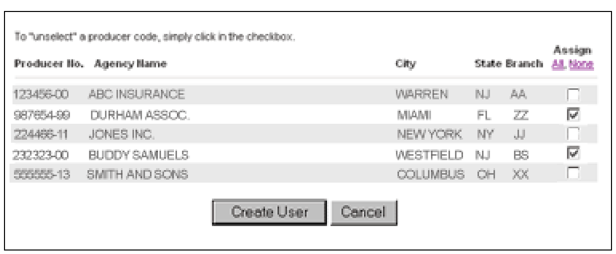
User selected for update




Role Description See Step 4



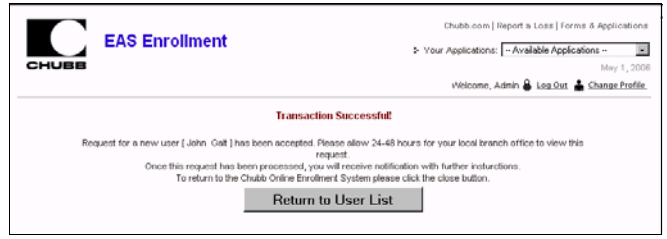

Producer Code Number See Step 5






## Procedures for Requesting a New User

STEP 10 Click Create User

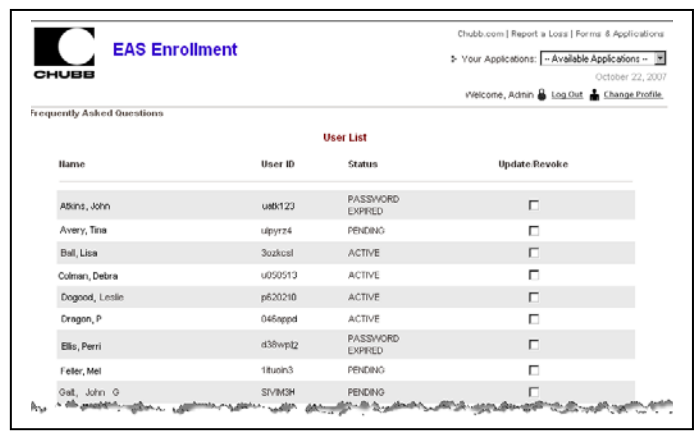



Click Return to User List to display a list of users including the one just added.

### NEXT STEPS

Within two business days, you will receive an email from the branch containing the user ID for the requested user. The new user will receive a separate email with their new password.

*Note: As the administrator, you can see a list of your individual users and the status of a recent request on the main menu page.*



**If you want to know about**

- Adding or changing someone's access
- Adding or changing a producer code number for a user

**Introduction**

You may only update two things for a user

- Role (Access)
- Producer Code Number

**Role (Access)**

You may need to change a user from one role to another or add an additional role. Initially, everyone receives the "Agent Universal" access that provides entry to:

- Chubb News
- Agency CheckView
- Agency ClaimView
- Preferred Vendor Network

Adding an additional role is easily accomplished by simply clicking the appropriate box opposite the requested role(s). Changing a role may require clicking in the box to eliminate a check mark and clicking another box to request the new role.





**Producer Code Number**

It may also be necessary to change an individual from one producer code number to another as responsibilities in your agency change. To do this, simply click once in the box no longer required and click again in the required box. Step-by-step directions are provided.

*Note: When adding a user for the first time, the user automatically receives all of the producer code numbers that you, as an admin, have access to within the system. If the user should not have all of these code numbers, once the request has been approved by the local branch office, you, as the admin, need to perform an update to the individual's access by following the above steps.*

**Individual User's Profile**

It is also possible that a user may come to you wanting a name change or other personal information change. This needs to be done by the individual user. Refer them to the "Change Profile" selection on the EAS Enrollment page. They can make the appropriate change there.