

How to set up your agency in IVANS Exchange

IVANS Exchange is a complimentary online tool for independent insurance agencies to quickly view and manage insurer download connections on demand.

Through intuitive graphical dashboards, IVANS Exchange offers your agents a comprehensive view of current and potential download activity through a single application, providing an easier way to manage insurer connectivity.

IVANS Exchange provides a simpler way for your agency to increase insurer connections to drive higher agent productivity and better service for insureds.

The checklist below will help guide you through getting your agency set up in IVANS Exchange.

1. Log in or register your agency

If you are downloading information via IVANS, your agency already has an IVANS Exchange account. Before you can access any dashboards or reports in IVANS Exchange, you must first log in using your IVANS User ID and Password or register for a new user account.

To log in or register, visit exchange.ivansinsurance.com.

Tip

If you don't know your IVANS Exchange credentials, complete the form located at exchange.ivansinsurance.com. IVANS will look up your account and provide you with steps to register for a new user account.

2. Review your agency dashboard

Once you log in to IVANS Exchange, you'll see your agency dashboard. This graphical dashboard offers a single location to view all of your agency's current download usage, connections opportunities and relevant industry news.

3. Access your IVANS Connections Report

Your IVANS Connections Report shows all lines of business your agency is currently downloading as well as inactive download connections that are available to your agency.

4. Customize your IVANS Connections Report

IVANS Exchange enables you to customize your IVANS Connections Report to identify your current download needs and future download requests. Your insurers also have the ability to see what you have identified on your Connection Report.

5. Receive automated email notifications of available connections

As the administrator for your IVANS account, you may receive automatic emails that notify you of any newly available lines of business on your IVANS Connections Report. To receive notifications, please click on the "clock" on your Connections Report screen to activate your notifications.

6. Contact the insurer

Your IVANS Connections Report includes insurer contact information, allowing you to know exactly who you need to contact to request new lines of business for download or report an issue. Click on the insurer name in the report to see their contact information for download questions and assistance.

7. View insurer feedback to your requests

View feedback to agency request for download, within the application. IVANS Connection team will work with you and your insurers to activate the download that you have indicated that you want.

8. Turn on available downloads

After you have updated your Connections Report, a member of our Connections team will reach out to you to confirm your selections and contact your carriers.

9. Access markets for your commercial risks

Perform a market appetite search in IVANS Markets to quickly find the right market for an insured's commercial risks. IVANS Markets also provides you with access to data-driven market insights, allowing you to review the latest premium renewal rate change trends across the most placed commercial lines business. Access IVANS Markets through IVANS Exchange. Or, you can access IVANS Markets directly by visiting markets.ivansinsurance.com.

10. Single policy resend

Single Policy Resend gives agents the ability to resend single eDocs and Messages, Claims or policies downloaded during the previous 90 days. You can access Single Policy Resend via the drop-down menu found in the upper right corner of the IVANS Exchange application and selecting Mailbox. To learn more about Single Policy Resend, visit ivansinsurance.com/en-us/for-agents/resources/videos/ivans-exchange-single-policy-resend-and-agency-profile/.

About IVANS

IVANS is the property and casualty insurance industry's exchange connecting insurers, MGAs, agencies and insureds.

IVANS cloud-based software automates the distribution and servicing of insurance products. For more than 30 years, IVANS innovation and expertise have connected more than 30,000 independent insurance agencies and 380 insurer and MGA partners to enable millions of people to safeguard and protect what matters most in people's lives.

Call 855.233.9128
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