



@chubb Agency Administrator User Guide

Chubb's Online Enrollment System	3
Access.....	3
Introduction	5
Requesting a New User	6
Updating a User	8
Procedure for Updating a User	9
Revoking a User(s)	11
Defining Agency Preferences (Personal Lines Only)	11
Additional Assistance.....	12
Records.....	12



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 guide 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 allow your agency employees to access?

Everyone has access to:

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

Agency Licensing Contacts have access to:

- Producer Appointment Express

Accounting Specialists have access to:

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

Agency Claims Contacts have access to:

- PL Claims Activity "My Alerts"

Accident & Health Agents have access to:

- Accident & Health Policy Inquiry



Access (continued)

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		√

Commercial Lines Agents have access to:

	Agent	Agent Leader
Business Direct Bill	√	√
Business Loss Runs	√	√
Business PolicyView	√	√
Cargo Certificate Issuance	√	√
Commercial Property Valuation	√	√
Customarq Classic Policy Forms	√	√
DecisionPoint: Professional Liability Quotes for Not-for-Profit Organizations and Private Companies	√	√
Employment Practices Liability Loss Prevention Services (ChubbWorks)	√	√
Life Sciences Forms	√	√
Life Sciences Wizard	√	√
My Loss Scenarios	√	√
Technology E&O "Smart App"	√	√
u.writer: Builder's Risk	√	√
u.writer: Contractors' Equipment Express	√	√
WORLDcert Clinical Trials Certificate Issuance	√	√
Monthly Commission Summaries		√

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.



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.

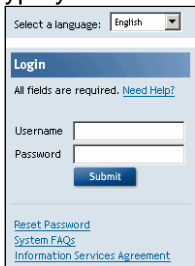
How to Login

1. Open Internet Explorer and type:
www.chubb.com

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.

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.

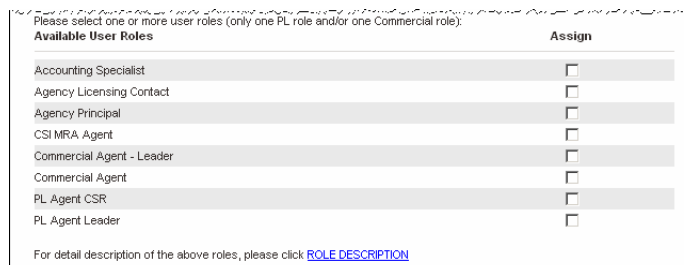
STEP 7 **Business State**

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



Available User Roles	Assign
Accounting Specialist	<input type="checkbox"/>
Agency Licensing Contact	<input type="checkbox"/>
Agency Principal	<input type="checkbox"/>
CSI MRA Agent	<input type="checkbox"/>
Commercial Agent - Leader	<input type="checkbox"/>
Commercial Agent	<input type="checkbox"/>
PL Agent CSR	<input type="checkbox"/>
PL Agent Leader	<input type="checkbox"/>

For detail description of the above roles, please click [ROLE DESCRIPTION](#)

Requesting a New User (continued)

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
123456-00	ABC INSURANCE	WARREN	NJ	AA	<input type="checkbox"/>
987654-99	DURHAM ASSOC.	MIAMI	FL	ZZ	<input checked="" type="checkbox"/>
224466-11	JONES INC.	NEW YORK	NY	JJ	<input type="checkbox"/>
232323-00	BUDDY SAMUELS	WESTFIELD	NJ	BS	<input checked="" type="checkbox"/>
999999-13	SMITH AND SONS	COLUMBUS	OH	XX	<input type="checkbox"/>

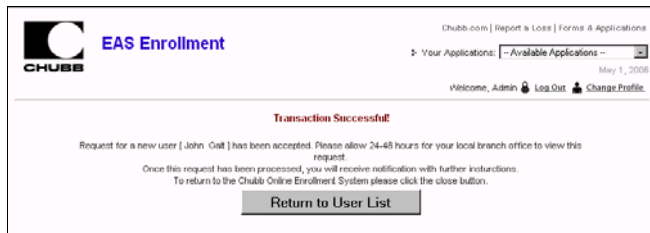
Create User Cancel

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 10 Click

Create User



Transaction Successful

Request for a new user (John Galt) has been accepted. Please allow 24-48 hours for your local branch office to view this request.

Once this request has been processed, you will receive notification with further instructions.

To return to the Chubb Online Enrollment System please click the close button.

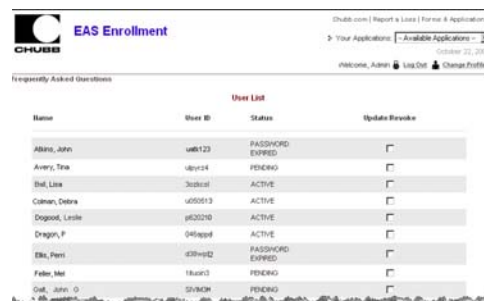
Return to User List

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.



Name	User ID	Status	Update Profile
Abino, John	ua8123	PASSWORD EXPIRED	<input type="checkbox"/>
Avery, Tina	ub9c14	PENDING	<input type="checkbox"/>
Bid, Lisa	3edical	ACTIVE	<input type="checkbox"/>
Coman, Debra	u05013	ACTIVE	<input type="checkbox"/>
Dogood, Leslie	u02010	ACTIVE	<input type="checkbox"/>
Dragon, P	041998	ACTIVE	<input type="checkbox"/>
Edu, Penn	431912	PASSWORD EXPIRED	<input type="checkbox"/>
Feder, Mel	18uac3	PENDING	<input type="checkbox"/>
Galt, John G	201809	PENDING	<input type="checkbox"/>

Updating 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.





Procedure for Updating a User

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

User List			
Name	User ID	Status	Update/Revoke
Abino, John	stzicst	PASSWORD EXPIRED	<input type="checkbox"/>
Avery, Tina	uipyz4	PENDING	<input type="checkbox"/>
Bal, Lisa	3o3icst	ACTIVE	<input type="checkbox"/>
Colman, Debra	u95513	ACTIVE	<input checked="" type="checkbox"/>

As the Agency Administrator, you have the ability to add, update or revoke users from the list above. Please refer to the "Agency Administrator User's Guide" for step-by-step instructions on how to perform these changes.

Request New User Update User Revoke User(s)

STEP 2 Click **Update User**
The **Update User** window displays for the selected person.

User selected for update ←

Please review and make changes as needed.

User Information

First Name: Debra
Last Name: Colman
City: Anytown
State: CO
MI: G

* - indicates a required field.

Role Description See Step 4 ←

Update user roles (only one PL role and/or one Commercial role):

User Roles	Assign
Accounting Specialist	<input type="checkbox"/>
Agency Licensing Contact	<input type="checkbox"/>
Agency Principal	<input type="checkbox"/>
Commercial Agent - Leader	<input type="checkbox"/>
Commercial Agent	<input type="checkbox"/>
PL Agent CSR	<input type="checkbox"/>
PL Agent Leader	<input checked="" type="checkbox"/>

For detail description of the above roles, please click [ROLE DESCRIPTION](#)

Producer Code Number See Step 5 ←

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

Producer No.	Agency Name	City	State	Branch	Assign
123456-00	ABC INSURANCE	WARREN	NJ	AA	<input type="checkbox"/>
987654-99	DURHAM ASSOC.	MIAMI	FL	ZZ	<input checked="" type="checkbox"/>
224486-11	JONES INC.	NEW YORK	NY	JJ	<input type="checkbox"/>
232323-00	BUDDY SAMUELS	WESTFIELD	NJ	BS	<input checked="" type="checkbox"/>
555555-13	SMITH AND SONS	COLUMBUS	OH	XX	<input type="checkbox"/>

Create User Cancel

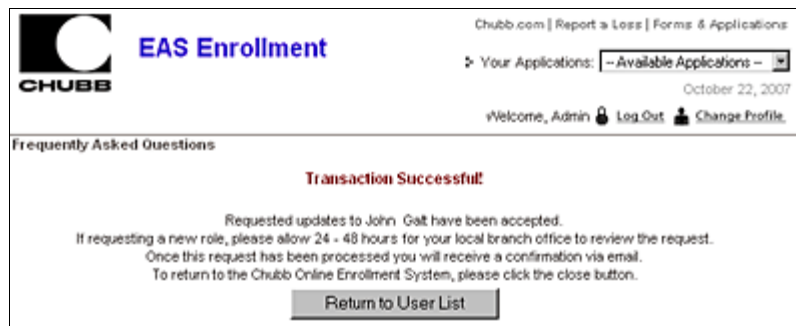
Updating a User Procedure (continued)

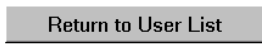
STEP 3	DETERMINE... If you are	Then
	Changing/adding Roles	Proceed to Step 4
	Changing/adding Producer Code Numbers	Proceed to Step 5

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 <input checked="" type="checkbox"/> (check mark) displays in the box. Proceed to Step 6.
	Deleting an existing Role	Click the existing <input checked="" type="checkbox"/> (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 <input checked="" type="checkbox"/> (check mark) displays in the box. Proceed to Step 6.
	Deleting an existing Producer Code Number	Click the existing <input checked="" type="checkbox"/> (check mark) in the Assigned column associated with the Producer Code Number to be deleted. Proceed to Step 6.

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



Click .
A list of users including the one updated displays.

Revoking 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.

User List			
Name	User ID	Status	Update/Revoke
Abins, John	st2kcs1	PASSWORD EXPIRED	<input type="checkbox"/>
Avery, Tina	u4pr24	PENDING	<input type="checkbox"/>
Bal, Lisa	3o2kcs1	ACTIVE	<input type="checkbox"/>
Colman, Debra	u05513	ACTIVE	<input checked="" type="checkbox"/>

As the Agency Administrator, you have the ability to add, update or revoke users from the list above. Please refer to the "Agency Administrator User's Guide" for step-by-step instructions on how to perform these changes.

Request New User Update User Revoke User(s)

STEP 2 Click **Revoke User(s)**
The following **Revoke User Confirmation** message displays.

Revoke User Confirmation

Are you sure you want to revoke the following user?

Colman, Debra

STEP 3 Click **Yes**
The **User List** displays.

Special Notes: Defining Agency Preferences (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

