

How Partner XE™ Matches Downloaded Policies

First Match: Entity (for agencies with multiple entities)

Initially, the agency code downloaded with the policy will be used to identify the correct entity into which it should be placed.

- If the agency code matches to an entity, the policy will be placed in that entity using the second and final match criteria below.
- If the same agency code is designated for multiple entities in Partner XE™, the policy will be placed in the Download Entity Assignment (DEA) for manual assignment
- If there is no agency code entered, the policy will be placed in the Download Entity Assignment (DEA) for manual assignment

Second Match: Policy

When a policy is downloaded, Partner XE™ will attempt to match the downloaded policy to an existing policy. For the system to recognize and overlay an existing policy (for policy changes & cancellations), the following must match:

- Policy # (i.e. 1234567 is not the same as 1234567-1)
- Line of Business
- Effective Date
- NAIC code (a 5-digit code that represents the Writing Company) as it was downloaded by the Writing Company
 - o Writing Company - the company that issues/writes the policy. For example, Progressive is a Company Group while Progressive Property & Casualty or Progressive Specialty are writing companies.

Final Match: Client

If the system cannot match a policy based on the criteria above, it will then try to place the policy into the correct client folder. The following must match:

- Client Name (i.e. William Smith is different than Bill Smith or William A. Smith)
- Client Address Line 1 (i.e. 1234 West Main St. is different than 1234 W Main Street)

If the downloaded policy cannot be matched to a policy but does match a client, it will place that policy in the client folder. This is the desired result for renewals. The prior term policy is retained in the folder and the renewal downloads as a future policy. When the effective date rolls around, the system will activate the future policy and inactivate the prior term.

If the downloaded policy cannot be matched to a policy or a client, Partner XE offers two options:

1) **Default Option** - Partner XE will automatically create a new client. This option is the default option and is recommended when the agency is receiving an initial load of policies from a carrier or if they want the system to create new clients for them if it is not able to match the policy or client.

2) **Enable Download Policy Assignment** – This option will place the policies that were not able to match the policy or client into a “hold” area. The user can then go to the Download Policy Assignment and manually assign the policy to the correct client or create the new client. This option is available in the SIS Administration module. Settings > Download > Check **Enable Download Policy Assignment**.

To eliminate “duplicate” clients:

- Enter information into Partner XE as it appears on an application/carrier website using the above criteria to match clients
- Enter new clients on the carrier site only and allow it to download into Partner XE™ to create the client automatically
- Use the Download Policy Assignment feature to manually assign policies for policies and clients that do not match