Self-Administration: My Contacts

Step-by-Step Guide

Overview

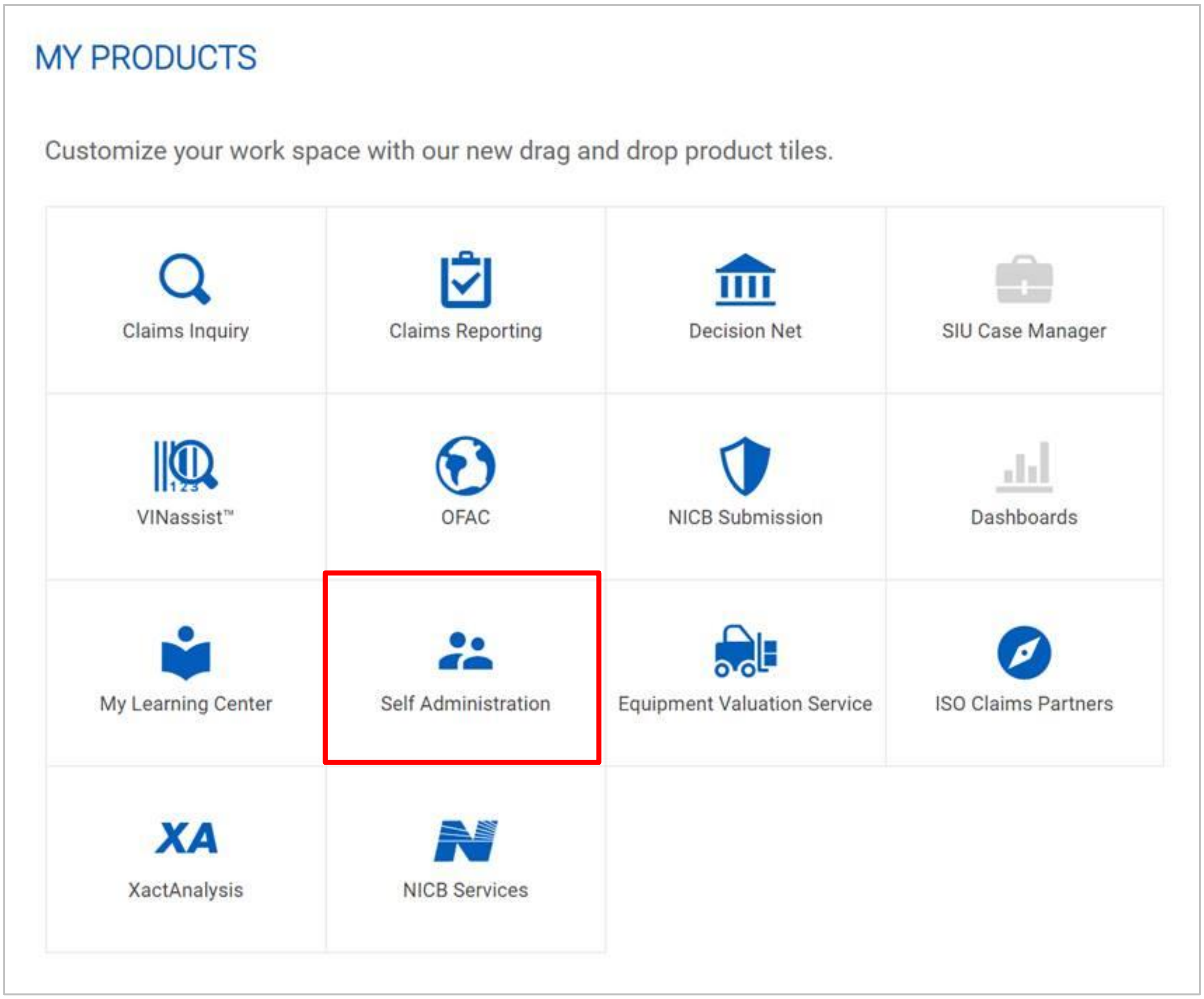
The My Contacts feature offers several benefits for administrators:

- Seamlessly manage your own contacts
- Add or delete internal company contacts
- Update contact information at any time
- Ensure home office contacts, also known as primary contacts, are accurate
- Select multiple area-of-interest options to opt in or out of communications
- Export a contact user list for various purposes

Let’s get started!

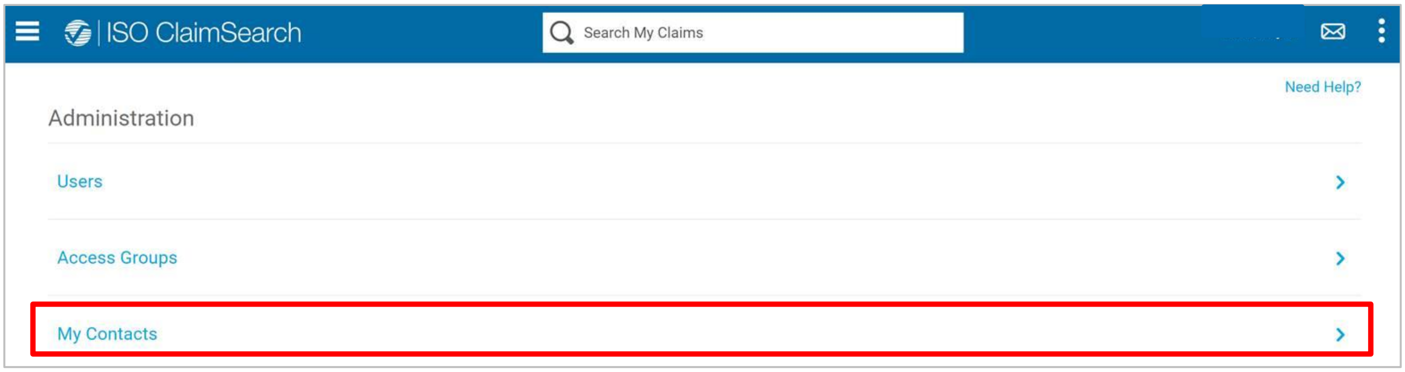
Logging In

When you log in to ISO ClaimSearch®, you'll find the Self-Administration tile as seen below:



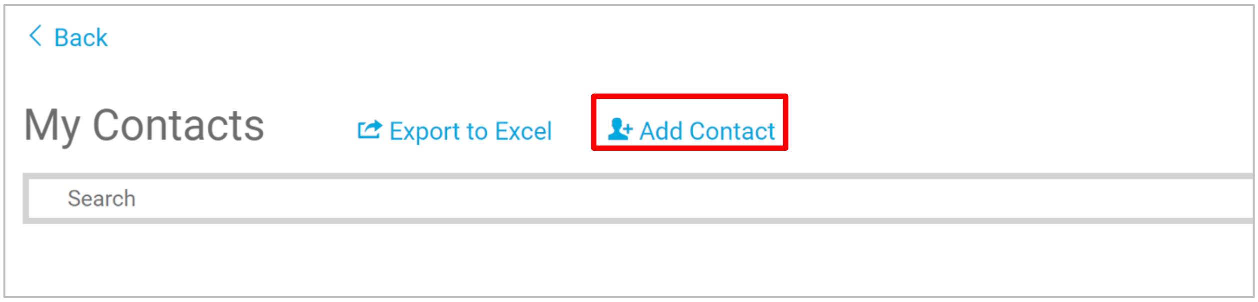
Administration Page

When you click the Self-Administration tile, the system will navigate you to the Administration page, where you can click on My Contacts as seen below:

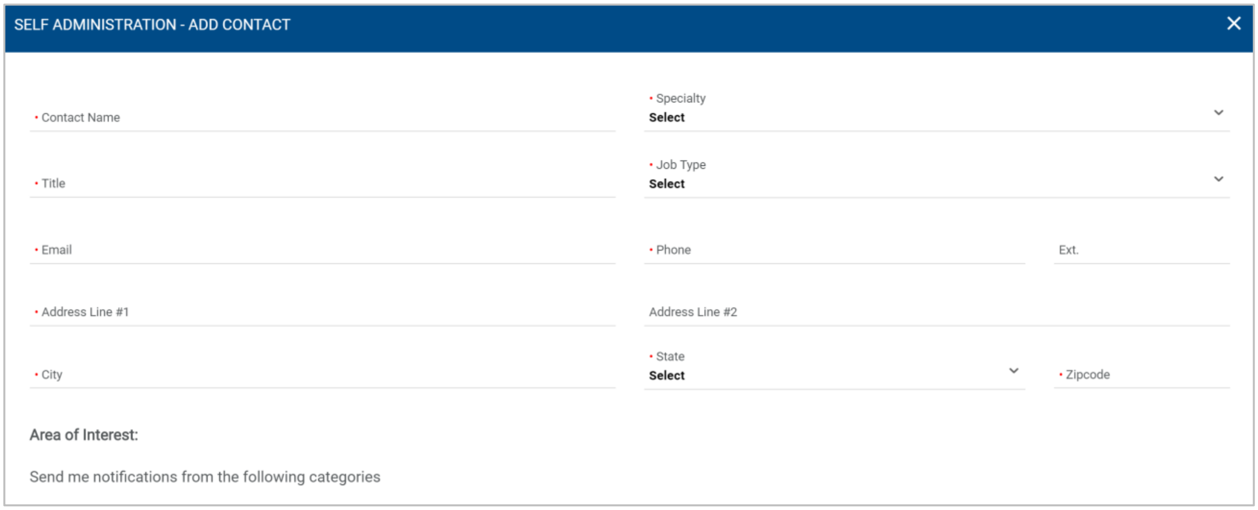


Adding a New Contact

Once you're on the My Contacts page, you can add a new contact by selecting the Add Contact option as seen below:

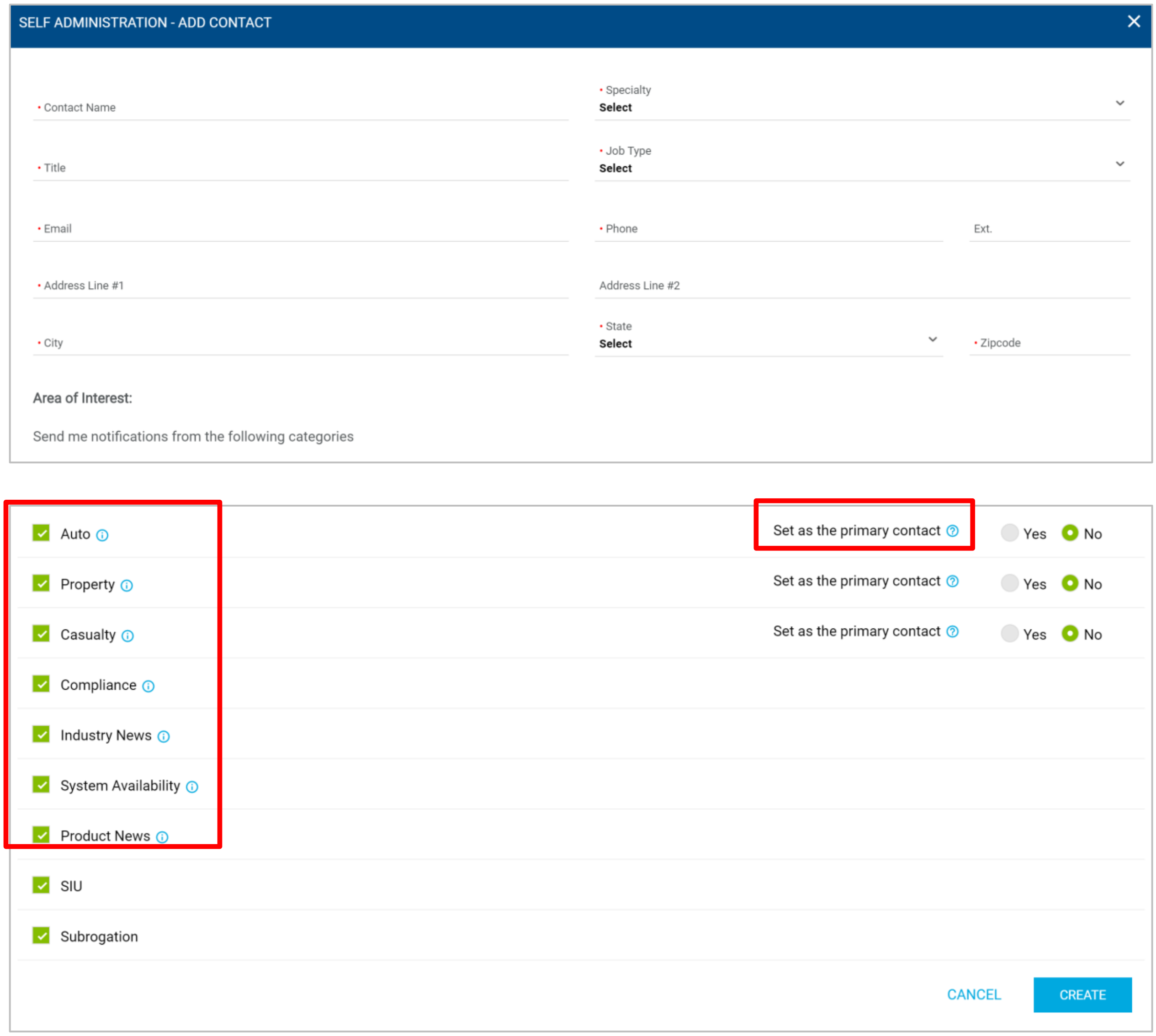


After selecting Add Contact, a new window will open. You must fill out the required fields, and you'll also have the option to select or deselect various communication preferences:



Useful Tips

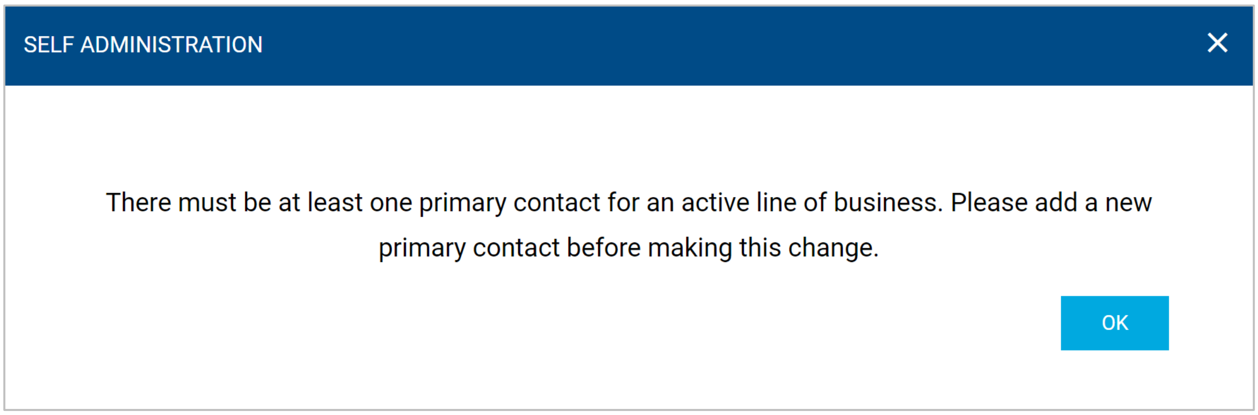
Below is useful information on some of the different fields on the Add Contact window:



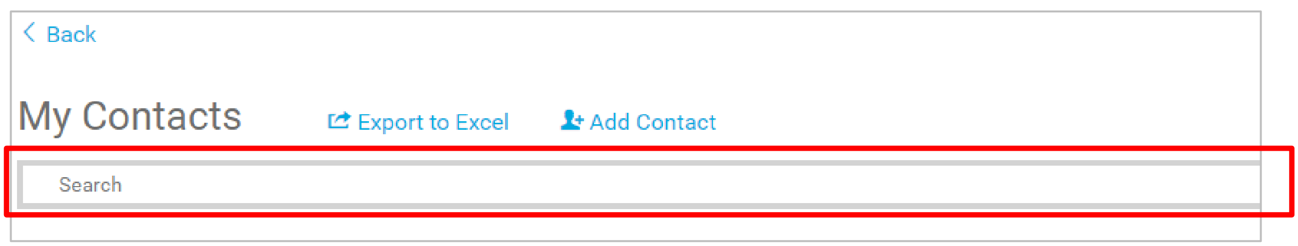
Set as the primary contact: A primary contact is also known as the home office contact and will be responsible for receiving and sharing *all* communications related to the specific line of business with the correct audience.

You can designate a different primary contact for auto, property, and casualty, depending on your ISO ClaimSearch subscription.

If someone should continue to be a contact but no longer a primary contact, you must designate an alternate primary contact first. If you don’t, the below message will pop up:



The Search field (near the top of the page) allows the administrator to search for a contact by name, e-mail, or phone number.



Area of Interest

Below are descriptions of the types of communications a contact will receive when selecting the following interests:

Auto – Includes auto physical damage, theft, salvage, and recovery

Property – Includes fire, theft, and other-peril first-party claims as well as pet insurance, boat, and mobile equipment losses

Casualty – Includes workers' compensation, injury, liability, and third-party property damage (other than auto)

Compliance – Regulatory or systemic changes that may affect compliance-related services

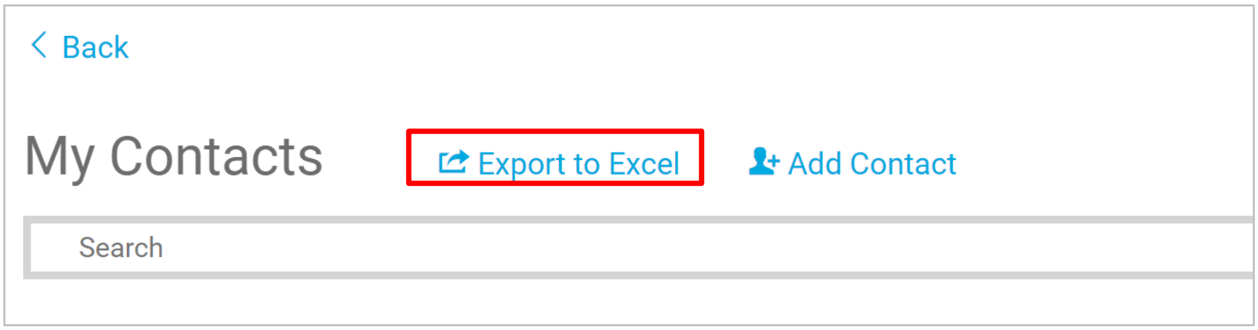
Industry News – Includes newsletters, thought leadership articles, and white papers on topics of interest affecting the industry

System Availability – Notifications of outages affecting the ISO ClaimSearch website or system-to-system connections

Product News – Information specific to ISO ClaimSearch core and optional products and services

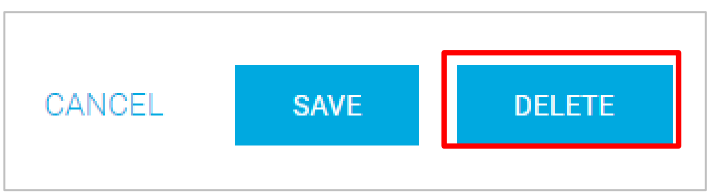
Export to Excel

If you require a complete list of all company contacts, you can export a contact's user list by selecting Export to Excel on the My Contacts page:



Deleting a Contact

You can delete a contact by clicking the edit symbol for the specific contact you wish to delete. After the contact's profile expands, click the delete option on the lower right-hand side:

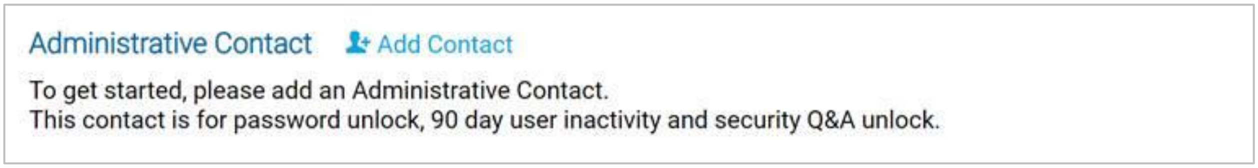


Note: If a primary contact is being deleted, you must first designate an alternate contact as a primary contact.

Administrative Contact

This contact is a little different from primary and area-of-interest contacts. This field allows for one administrative contact that users will be presented with when they’re locked out of their ISO ClaimSearch account. Users will be able to contact this administrative contact for assistance in unlocking their account.

- There must be a name or department listed and at least an e-mail and/or phone number listed for this contact.



E-mail Notifications

- An e-mail will be sent to any new contacts that have been added or updated informing them of their communication preferences. This allows new contacts to confirm that their information is correct and makes them aware of what communications they’ll receive.

- Another e-mail will be sent to administrators if they have not logged in to My Contacts within 180 days. We want to ensure that all contacts are correct and up to date; therefore, this e-mail will be a friendly reminder to all administrators.