Electronic Document Delivery (eDocs) - Frequently Asked Questions

Electronic Document Delivery (eDocs) gives agencies the ability to view, save, print and e-mail commercial policy documents via CNACentral.com prior to or in lieu of receiving the paper version. The policy types that are available online include: CNA Connect, Package, Workers’ Compensation, Commercial Automobile, Commercial Umbrella, NetProtect Essential™, Inland Marine, Crime, Boiler & Machinery, Mono-line Property and General Liability.

Policy documents are available the next business day after they are processed. Agencies can choose to receive an e-mail message informing them when the documents are available online. Policy Documents include new business, renewals, endorsements, audits, rating worksheets, cancellation memos and reinstatement memos.

Legal Notices are also available in eDocs. Legal notices include, cancellation, cancellation rescissions, non-renewal, non-renewal rescissions, reinstatements, and renewal/conditional renewal notices.

You will need Acrobat Reader (version 7.0 or newer is recommended) to view eDocs, which you can download for free from http://www.adobe.com/products/acrobat/. Please contact your IT department if you need assistance downloading or installing Acrobat Reader.

Need more help with eDocs?

- View the User's Guide for more information.
- Security Administrators: View the eDocs Security Administration Guide for instructions on setting up who receives eDocs notifications at your agency.
- Contact your CNACentral.com Agency Security Administrator in your office for changes to your delivery options.
- Call the CNA Agency Help Desk at 800-CNA-HELP (800-262-4357) for further assistance.

E-mail Notifications

How do I get setup to receive eDocs e-mail notifications?

Can I receive the eDocs e-mail notification messages if I'm not a registered CNACentral.com user?

Who is my CNACentral.com security administrator?

I am a security administrator for my agency, how do I set someone up to receive eDocs?
More than fifteen people need to receive eDocs notifications for our agency code. How can we set that up?

What if I don't receive an e-mail notification?

My e-mail notifications do not have clickable links. How do I get them added to my notices?

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How do I determine what producer code a policy was issued under?

Can I save the document to my agency management system?

Why does the document that I am viewing online say "INSURED" in the footer; where do I find the "AGENT" copy?

Why does the Policy Inquiry file have a break out display when I view the document?

When I'm trying to view a document I see a message which says “Producer not authorized;” what does that mean?

Need more help with eDocs?
E-mail Notifications

How do I get setup to receive eDocs e-mail notifications?
Please contact your agency’s CNACentral.com Security Administrator and request to be setup to receive eDocs e-mail notifications. Your Security Administrator can assign up to fifteen users to receive eDocs notifications via e-mail for each producer code for the agency. Remember that these documents contain confidential information and only registered CNACentral.com users may access electronic documents via CNACentral.com. If you do not have a user ID for CNACentral.com your agency’s Security Administrator can provide you with access.

Anyone at the agency who has been setup to receive eDocs will receive an e-mail notification message each day when electronic documents (eDocs) become available via CNACentral.com. The e-mail notification will be sent the next business following processing of the document.

Can I receive the eDocs e-mail notification messages if I'm not a registered CNACentral.com user?
Only registered CNACentral.com users may receive the eDocs e-mail notification messages or access electronic documents via CNACentral.com. Contact your agency’s CNACentral.com Security Administrator or the Agency Help Desk at 1-800-CNA-HELP or e-mail: cna.help@cna.com if you have questions on granting authority to others within your agency.

Who is my CNACentral.com security administrator?
Log into CNACentral.com and click the HOME link in the upper-left navigation bar. Once on the HOME page, look to the RIGHT navigation bar and click on “My Profile” and then “Who is my administrator?” This will list the CNA Central Security Administrator(s) at your agency. You may also contact the Help Desk at 1-800-CNA-HELP (1-800-262-4357) or e-mail: cna.help@cna.com for assistance in identifying who your security administrator is.

I am a security administrator for my agency, how do I set someone up to receive eDocs?
See the eDocs Security Administration Guide for instructions on setting someone up to receive eDocs notifications.

More than fifteen people need to receive eDocs notifications for our agency code. How can we set that up?
Up to fifteen e-mail addresses can be setup to receive eDocs notifications for each agency producer code. If more than fifteen people need to receive these notifications, please contact your agency’s e-mail support team (or IT department) to find out if they would be able to setup ONE centralized e-mail address that can be used to distribute e-mail messages to a “group” of e-mail recipients. If this is done, this one e-mail address may be used to send notifications to multiple people for your agency.
What if I don't receive an e-mail notification?
If there was no activity on any of your accounts, you will not receive an e-mail message. It is possible that a document is available online through Policy Information at CNACentral.com before you receive the e-mail message notification. The e-mail notification will be sent the next business day following processing. If you are aware that a transaction has been made, but have not received an e-mail, contact the agency helpdesk at 800-CNA-HELP (800-262-4357) or e-mail cna.help@cna.com.

My e-mail notifications do not have clickable links, how do I get them added to my notices?
If your e-mail notifications do not have clickable links, contact your agency’s CNACentral.com Security Administrator. They will be able to modify the eDocs preferences for your agency to receive HTML based messages.

Printed Documents and Mailed Copies

Why do I no longer receive legal notices in the mail?
Beginning January 2, 2008, CNA ceased mailing paper copies of legal notices to your agency. Legal notices include; cancellation notices, rescission notices, reinstatement notices, non-renewal notices, non-renewal rescissions and renewal/conditional renewal notices. This action was taken as the result of a recommendation from PACER to allow these notices to be viewed by the agents before the documents would be received by the insured via USPS delivery.

Will I still receive the agent copy of policy transactions?
Provided your agency has NOT opted out of receiving hard copy for policy transactions you will receive Agent Quality Control Documents as applicable which consist of “Agent Quality Control Declarations” (which includes-Declaration page, Schedule, Forms with Customer Specific Text/Fill in data, Rating Worksheet, Pay Plan with Commission and Quality Letter).

Note both the Agent Quality Control Documents as well as the Insured Full Declaration documents will be available electronically via eDocs.
What documents will CNA send directly to my client?
CNA will continue to send Legal notices (Legal notices include: cancellation notices, rescission notices, reinstatement notices, non-renewal notices, non renewal rescission and renewal/conditional renewal notices) directly to the insured. These notices are clearly identified in the Electronic Document Delivery e-mail notification.

All other insured copies of policy related documents are sent directly to the agent for distribution to the policyholder, unless you are contracted with the CNA Service Center for this value added service. If you are not signed up for the CNA Service Center service and would like additional information, please contact your CNA Field Sales Specialist.

See the eDocs chart below for a listing of which documents are sent to agents and insureds.

EDoc’s Chart Note

<table>
<thead>
<tr>
<th>Action Document</th>
<th>Type</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent no longer receives these documents. The insured copy is sent direct to the insured by CNA</td>
<td>Legal Notices</td>
<td>Cancellation Notices</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cancellation Rescission Notices</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Non-Renewal Notices, Non-Renewal Rescission Notices</td>
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<tr>
<td></td>
<td></td>
<td>Reinstatement Notices</td>
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<tr>
<td></td>
<td></td>
<td>Renewal/Conditional Renewal Notices</td>
</tr>
<tr>
<td>Agents receive an agent QC document copy as well as insured copy of these documents (unless these options have been turned off by the agent).</td>
<td>Policy Related Transactions</td>
<td>New Business &amp; Renewal Declarations</td>
</tr>
<tr>
<td></td>
<td>Cancellation Credit Memos</td>
<td>Endorsements</td>
</tr>
<tr>
<td></td>
<td>Cancellation/Reinstatement</td>
<td>Cancellation memos (Cancellation Flat or Prorata)</td>
</tr>
<tr>
<td></td>
<td>Memos</td>
<td>Reinstatement memos(Reinstatement-Flat, Reinstatement Pro Rate)</td>
</tr>
<tr>
<td>Insured copy should be distributed to the insured. Note if you Agent is going paperless for some or all Insured specific transactions-Be sure to distribute a paper or electronic copy to the insured</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Can we choose to stop receiving the printed agency copy?
Yes. Contact your CNA Central Agency Security Administrator who will be able update your agency’s eDocs settings. This preference can be applied to all document types or just those that you would like to suppress. CNA will continue to mail you the insured copies to the agency. As legal notices are no longer mailed to agents, you do not need to turn off legal notices. For assistance you may also contact the CNA Agency Help Desk at 800-CNA-HELP (800-262-4357) or cna.help@cna.com.

Can we choose to stop receiving the printed insured copy?  Yes. Contact your CNA Central Agency Security Administrator who will be able update your agency’s eDocs settings. This preference can be applied to all document types or just those that you would like to suppress. CNA will continue to mail you the insured copies.

How do I print electronic documents?
Log in to CNACentral.com and go to Policy Inquiry to search for the policy by name, policy number or account number. The Document can then be printed using standard Adobe print functionality.

Using eDocs through CNA Central

As a CNA Small Business Service Center agency, are policy documents still being mailed to policyholders and other interested parties?
For Small Business Service Center agents, CNA will mail hard copies of all policy transaction documents directly to the insured. CNA will also continue to mail the agency a paper copy of policy documents unless the agency has turned off this option via CNA Central.

If I choose to turn off the agent's policy documents, but still need to have automobile identification cards printed, how do I accomplish that?
You can choose to turn off the agent's copy of the policy documentation; you can elect to just receive the automobile identifications cards if you can not print them from within your agency management system.

How long will my files be available on-line?
Electronic documents will remain available for seven years.

What if my contract with CNA is terminated, how long will I have access to policy documents?
If your contract is terminated you will have read-only access to CNA Central for five years, which will include the ability to view and print eDocs.

How do I determine what producer code a policy was issued under?
The eDocs e-mail notification includes the producer code which the policy was issued under. This information is located in the second paragraph of the e-mail notice.
Can I save the document to my agency management system?
Most of the recent versions of popular agency management systems will allow you to attach a PDF file to the account information file. These include Applied Wintam, Applied Vision, AMS AFW, AMS Sagitta, EbixASP and Ebix One. Check with your User Group, Help tools or call your agency management system vendor for more detail on this functionality.

Why does the document that I am viewing online say "INSURED" in the footer; where do I find the "AGENT" copy?
The paper copies of documents such as the declarations page are identical except for the "INSURED" or "AGENT" in the footer. CNA selected the "INSURED" copy to be available so that the agent may use this version of the document to retain for their records, as well as being able to provide a copy to the policy holder or other interested parties if needed. For Small Business and Middle Market Segments agent copies of "internal" documents that don’t get sent to the policy holder (Quality Control Declaration, Quality Letter, Rating Worksheets, Pay Plan with Commission will have "AGENT" in the footer.

The Insured copy is what is viewed on line for all Legal Notices.

Why does the Policy Inquiry file have a break out display when I view the document?
The Policy Inquiry view document break out display provides additional functionality to allow the agent to view-Quality Control, save or print either the entire document or specific documents. Please note, both the direct e-mail link and Electronic Document Deliver links will render the entire document and do not provide a break view of the policy.

When I'm trying to view a document I see a message which says “Producer not authorized;” what does that mean?
This means that the user ID you’re logging in with does not have access to the producer code which the policy was issued under. Your CNACentral.com Security Administrator can grant you access to the producer code which the policy was issued under.

How Can I view all Documents or a Specific Document Type (like Legal Notices)?
Use the Electronic Document Delivery link on the left panel of CNA Central to view a list of policy transactions for your producer code, use the All Sub-Producers check box to return all transitions that your security administrator has set up your authority to view. You can also search by account number, policy number and customer name. To view a smaller list of transactions, you can sort by effective date, print date or one or multiple Policy Document Types.