

The following describes the process by which agents with *Texas Mutual*<sup>®</sup> online services self-administration authority can manage their agency's preferred method for the delivery of correspondence from Texas Mutual. Delivery preferences (postal, fax and/or email) are controlled by document type (example: quotes) and apply to all agency documents of that type.

Process Step:	Directions to complete process step:
1. From the "Gateway" page navigate to the <i>User Admin</i> page	1.1 Select <i>User Admin</i> from the <i>More</i> drop-down list



Process Step:	Directions to complete process step:
2. From Main Menu page navigate to the <i>Manage Correspondence</i> page	2.1 Select the <i>Manage Correspondence</i> button



Process Step:	Directions to complete process step:
3. From the Agency Correspondence Administration page navigate to the document tabs	3.1 The tabs to the left indicate the documents that are available to set preferred method of communication. The tab text color will change to orange to indicate which tab is currently being worked and will also be shown at the top right of the correspondence window.



Process Step:	Document Descriptions:
3.2a-g Select document type to assign delivery method preference(s)	<p>3.2a-g Document descriptions are:</p> <ol style="list-style-type: none"> <li>ADDL_INFO: This document is generated by the underwriter when requesting additional information on the submissions or policies.</li> <li>EMOD: NCCI Experience Modifier worksheets</li> <li>ENDORSEMENT: Agent copy of change endorsements processed on policies</li> <li>POLICY_AGENT: Agent copy of policy. The delivery methods for policy are limited to Postal and Email as the number of pages exceeds the fax capability.</li> <li>POLICY_INSUR: Policyholder copy of policy. The delivery methods for policy are limited to Postal and Email as the number of pages exceeds the fax capability.</li> </ol>

	<p>f. QUOTE: All quotes for new and renewal business –both the agent and applicant copies</p> <p>g. START_TRAN: Start Transfer Letter – Letter advising the agent the risk is being transferred from Start to Voluntary market.</p>
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Table Property:	Table Property Descriptions:
4.1 Header Bar identification	4.1 The header bar identifies the Delivery Method specified, the Destination detailed information and the Remove button which allows the user to remove specific delivery methods.
4.2 Send Test Email	4.2 <i>Send Test To All Email</i> button will send a test email to each email address the user has added for that document type.
4.3 Add New delivery method and delivery address	4.3 <i>Add New</i> button allows the user to add delivery preferences for that document.

The screenshot shows the Texas Mutual Agency Correspondence Administration interface. At the top, there is a navigation bar with links for Gateway, My Book Of Business, Internet Quoting, and others. Below this is the Agency Profile section, which includes fields for Agency Name, DBA, Agency Id, and Contact Person. The main content area is titled 'Additional Information Documents' and contains a table with columns for Delivery Method, Destination, and Remove. A callout arrow points to the header bar of this table, labeled '4.1. Header bar with column descriptions'. Below the table, there are two callout arrows: one pointing to the 'ADD NEW +' button labeled '4.3. Add new delivery method for this document type', and another pointing to the 'SEND TEST TO ALL EMAIL' button labeled '4.2. Send test emails'. The interface also includes a sidebar with document type filters like DECLINE, ENDORSEMENT, POLICY\_AGEN, POLICY\_INSUR, QUOTE, and START\_TRAN, and a 'MAIN MENU' button at the bottom.

Process Step:	Directions to complete process step:
5. Adding new preferred methods of communication.	5.1 Select the delivery method type: Postal, Fax or eMail
	5.2 Choose from the contact information currently listed for the agency in Texas Mutual's system
	5.3 Select the ADD button
	5.4 Select the ADD SELECTED button when all preferred delivery methods and destinations have been selected.

The screenshot displays the Texas Mutual Agency Correspondence Administration interface. At the top, there is a navigation bar with links for Logout, Change Password, Help, and Contact Us. Below this is the Texas Mutual logo and the slogan "Here for Texas. Here to stay." A secondary navigation bar includes Gateway, My Book Of Business, Internet Quoting, Policy Inquiry, Endorsements, Loss Runs, DPGA, and More.

The main content area is titled "Agency Correspondence Administration" and shows an "Agency Profile" section with fields for Agency Name, DBA, Agency Id, and Contact Person. Below this is a table with columns for Delivery Method, Destination, and Remove. A "Add New Delivery Method" section is highlighted, featuring a "Delivery Method Type" dropdown menu (with options: eMail, Postal, Fax, eMail) and two lists: "Available" (containing test@texasmutual.com) and "Selected" (containing No Entries). Buttons for ADD, REMOVE, CANCEL X, and ADD SELECTED + are visible. A "MAIN MENU" button is located at the bottom.

Numbered callouts indicate the following steps:

- 5.1 Choose Delivery Method (points to the Delivery Method Type dropdown)
- 5.2 Choose Available address, fax or email (points to the Available list)
- 5.3 Add (points to the ADD button)
- 5.4 Add Selected (points to the ADD SELECTED + button)

**Example of multiple delivery methods for one document type:**

In this example, the agency has established multiple delivery methods for Texas Mutual quotes - fax, mail and multiple email addresses (i.e., every quote for the agency will be emailed to multiple addresses, faxed, and mailed).

The screenshot shows the Texas Mutual website interface for Agency Correspondence Administration. The header includes the Texas Mutual logo and the slogan "Here for Texas. Here to stay." with a background image of a construction worker. A navigation bar contains links for Gateway, My Book Of Business, Internet Quoting, Policy Inquiry, Endorsements, Loss Runs, DPGA, and More. The main content area is titled "Agency Correspondence Administration" and displays the "Agency Profile: THE EDGE" with details: Agency Name: THE EDGE, DBA: (blank), Agency Id: 503, and Contact Person: Lee. Below this is a "Quote Packet" table with columns for Delivery Method, Destination, and Remove. The table lists five entries: Fax to (512) 2242994, eMail to texas@texasmutual.com, Postal to 6210 E HWY 290, AUSTIN, TX 78723, eMail to mutual@texasmutual.com, and eMail to gmail@gmail.com. Each entry has a red 'X' icon in the Remove column. Below the table are buttons for "ADD NEW +", "SEND TEST TO ALL EMAIL", and "QUOTE". A sidebar on the left contains menu items: ADDL\_INFO, DECLINE, ENDORSEMENT, POLICY\_AGEN, POLICY\_INSUR, QUOTE, and START\_TRAN.

	Delivery Method	Destination	Remove
ENDORSEMENT	Fax	(512) 2242994	X
POLICY_AGEN	eMail	texas@texasmutual.com	X
POLICY_AGEN	Postal	6210 E HWY 290, AUSTIN, TX 78723	X
POLICY_INSUR	eMail	mutual@texasmutual.com	X
POLICY_INSUR	eMail	gmail@gmail.com	X

**Example of eMail for Quote and Policy Documents:**

The following is an example of the email an agent will receive if they choose email for Quote documents. There are two links for Quotes (the Agent's copy and the Insured's copy) to alleviate the need to separate the documents. Policy emails will be in a similar format.

Dear Agent,

Below is the link for your Auto Quote Letter

Agent Copy

<https://qacn.texasmutual.com/inituser.aspx?app=acpemail&pqnum=Q001123378&efdt=11-29-2010&trans=1&doc=AGTQUOTE>

Applicant Copy

<https://qacn.texasmutual.com/inituser.aspx?app=acpemail&pqnum=Q001123378&efdt=11-29-2010&trans=1&doc=INSQUOTE>

Having trouble? If you are unable to open the link, copy the entire URL into your browser.

If you have any questions, please contact your underwriter.

Sincerely,

Texas Mutual Insurance Company