

CNA Central Agent Guide



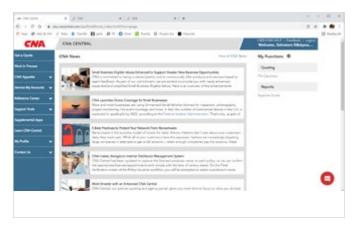
# What can you do in CNA Central?

Created based on feedback from agents like you, CNA Central provides a wide range of tools and services in one convenient location. This guide, which is organized by the sections you'll find on cnacentral.com, demonstrates how to use cnacentral.com to save time and work more efficiently.

(**Please note**: CNA Central requires a unique user ID and password. If you need help creating a user ID, resetting your password or updating privileges, please speak to your security administrator).

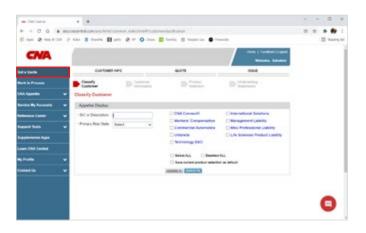
### Home Page

- Find the latest CNA Small Business news and product offerings.
- Find alerts for suspensions/restrictions.



### Get A Quote

- Use standard quoting to quote all lines of business.
- Use Quote Advantage to get a bindable CNA Connect<sup>®</sup> and/or Workers' Compensation quote for a single location account with no losses.
- Classify customers, check for eligibility and review CNA
   Central statements including class descriptions, reclassification considerations, minimum requirements, ineligible exposures and items to discuss with underwriting.
- Create proposal letters, refer policies to underwriting and issue new business.



### **Endorse Policy**

- Quote, refer and issue CNA Connect® endorsements.
- Submit endorsement requests for Workers' Comp, Auto and Umbrella by uploading complete Accord forms and other change documents from your agency management system or by completing an Accord 175 Commercial Policy Change Request form available in CNA Central.

### **Work In Progress**

- Obtain the status of new business and endorsements.
- Continue working on existing new business submissions and endorsements.

## **CNA Appetite**

- Download our Appetite Guide for a full list of CNA Small Business classes, SIC codes, industry types, general underwriting statements, products and territorial restrictions.
- Check eligible values for all lines of business.

# **Service My Accounts**

- Locate and view policies through Policy Inquiry, Electronic Document Delivery, Claim Information and Data Retrieval.
  - Look up CNA Small Business policies to view current information.
  - Change the "as of date" to see the policy as it was or will be, before or after an issued change or issued renewal.
  - Download policy documents such as new business, renewals and endorsements.
  - Access specific policy documents, via policy number, customer name, etc.
    - Electronic document delivery (eDocs)
  - Look up a range of policy documents (e.g., all renewal declarations for a certain week).
    - Electronic document delivery (eDocs)
- Access your billing information.
  - Easily find your billing details, including payments, cancellations, invoices and account status.
  - View and print your billing reference materials such as a no loss statement, audit dispute form, etc.
  - View your direct bill commission statements (this may require approval from a security administrator).
- Access Claims information.
  - View commercial claim contacts.
  - View claim status and loss experience.
  - Report a loss via the internet.
  - Access the Workers' Compensation Preferred Medical Provider Network.
  - Set up electronic alerts for when certain claim events occur.

# **Reference Center**

- Find valuable resources in our Agent Center.
  - Search and email marketing materials and supplemental applications by segment, product/service and size of your client's business operation. Marketing materials can be cobranded with your agency logo.
  - Access CNA's PrepWise® resources to help your clients minimize exposures with self-assessments, checklists and identification of exposure documents on topics such as cybersecurity and remote worker ergonomics assessment.
  - Access CNA's School of Risk Control Excellence® (SORCE®)
     catalog, which contains agent/broker e-learning or instructorled courses that can be complementary or fee-based. Topics
     include health and safety regulatory courses and industry specific classes for continuing education (CE) credits.
- Formnet Library
  - View and download policy forms by title, form number or edition date.
- Agency Production and Experience
  - Generate production and claim reports under Agency Production and Experience.
- Explore CNA's International, Ocean Cargo and Professional Services capabilities.
- Access CNA's industry-leading suite of Risk Control solutions.
- Learn about the advantages of enrolling in CNA's Small Business Service Center.

### **Support Tools**

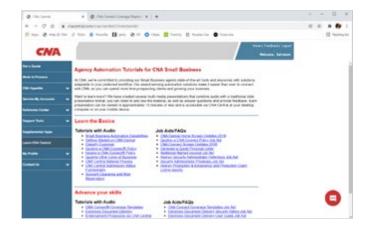
- Use our Coverage Playbook to find the most relevant base and optional coverages available for a specific classification on the CNA Connect policy.
- Compare general or industry-specific Choice Endorsements with our CNA Connect® Choice Endorsement Tool.
- Use our Insurance to Value (ITV) calculator to determine valid insurable range.
- Find a vehicle's year, make, model and cost new with our Vehicle Identification Number (VIN) lookup tool.

# **Supplemental Apps**

 Download and print supplemental applications and questionnaires for Technology, Data Breach, Misc. Professional & Contractors.

#### **Learn CNA Central**

Access a variety of online tutorials and job aids on various CNA
 Central processes, such as quoting new business, issuing policies, processing endorsements and reviewing claim information.



### My Profile

- View and edit your profile.
- Find security admin.
- Create CNA Connect coverage template (Access granted by security admin).

### **Contact Us**

- Use our contact list to find key CNA contacts across the U.S.
- Connect with our technical support team.
- Communicate with "Collins," our online chatbot.

