



# UPLOAD GUIDE

Easily upload submission data from  
your agency management system.



## Welcome to Upload with Snap®

Quickly and easily upload submission data from your agency management system directly into Snap using Upload! Save time and effort, while streamlining your processes by not having to reenter information again.

ICW Group is pleased to support Three methods for application upload:

- Applied Systems Transformation Station,
- AMS/Vertafore Transact Now
- ACORD PDF

We hope this guide answers all of your questions. For additional assistance, contact your agency's Snap Administrator or your ICW Group Business Development Underwriter.

To view the online version of this Upload Guide and other training materials, visit the ICW Agent Portal: <https://agentportal.icwgroup.com/login>.

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## Technical Information

### System Requirements

Snap is supported in the following system configurations.

- Microsoft 10 or 11
- Screen resolution: Minimum 1024 x 768 pixels (1280 x 1024 pixels recommended)
- Browser: Latest versions of Google Chrome (**preferred**), Mozilla Firefox.
- Set browser cache to “Automatically Check for Newer Versions of Stored Pages”

### For technical issues

For help with technical issues, contact your agency’s Snap Administrator or your ICW Group Business Development Underwriter.

## Helpful Snap materials

### Find everything fast in Agent Portal

You'll find Snap guides, how-to videos and more at Agent Portal  
<https://agentportal.icwgroup.com/login>

- **Snap Producer Guide:** Learn the Snap interface and steps for creating, submitting and binding applications.
- **Snap Administrator Guide:** Set up and maintain your agency's users in Snap.
- **Snap Upload Guide:** Save time and instantly upload applications using Applied Systems Transformation Station, AMS/Vertafore Transact Now, or upload straight from an ACORD PDF form.

### Training videos

You'll also find topic-specific videos in Agent Portal <https://agentportal.icwgroup.com/login>. These cover the most common Snap functions and features, and are listed with indexed links for your convenience.

- Navigation Overview
- Search and filter
- Collaboration Tools
- Prequalify or Check Clearance for a Submission
- Snap's Instant Quote (IQ)
- Uploading Submissions
- Updating Renewals

## Help Online in Snap

While in Snap, it's easy to get online help.

1. Simply click the **Help** icon in the top header area.



2. Select **Online Help** to view topics, search for a particular item or view tutorials.

## Getting Started

You can quickly and easily upload submission data from your agency management system directly into Snap to save time, reduce effort and eliminate data entry mistakes. Snap supports three application upload methods.

- Snap's AppReader (for processing ACORD forms)
- Vertaforte, formerly AMS, via TransactNOW
- Applied via IVANS Transformation Station

For additional assistance, or if your agency management system isn't listed, contact your agency's Snap Administrator or your Business Development Underwriter.

## Snap Application Reader (AppReader)

AppReader, Snap's built-in form reader, uploads data to Snap straight from ACORD applications created in your agency management system. AppReader works with all agency management system PDF documents. AppReader does not require installation, registration or additional software.

**Submissions that don't qualify for Instant Quote** - In order to receive a quote, you need to include four years of currently-valued loss runs included with the submission. Once a quote is accepted, coverage can be bound.

**Instant Quote submissions** - These can receive a quote without four years of currently-valued loss runs, but currently-valued loss runs must be attached to bind coverage.

## Uploading an ACORD PDF Form with AppReader

As part of the upload process, Snap automatically attaches the ACORD PDF to the submission record. You can easily view the ACORD attachment at any time by clicking on the **Collaboration** icon.

1. Locate the client record in your agency management system.
2. To attach the ACORD form to your email, open the **ACORD 130 Workers' Comp PDF** application and save it to your desktop. Note: You can skip this step if your agency management system allows you to attach the ACORD PDF to an email without saving it to your desktop.
3. Log into Snap and click **New Submission**.
4. Check the box **Upload from an ACORD Application**.
5. Click **Select File to Upload** to browse to the ACORD PDF for upload.
6. Select the ACORD PDF you want to upload and click the **Open** button. The file will upload.
7. Enter a **Needed By Date**, if desired.
8. Click **Create Application**.
  - Depending on the number of pages in the ACORD application, the upload could take two to three minutes.
  - While the upload processes, you can start another upload or complete other work in Snap.
9. Once completed, click **Yes** to open and finish the submission, or click **No** to remain on the page and continue working.
10. To complete the submission in Snap, complete all required fields. (See <https://agentportal.icwgroup.com/login>, Snap Producer Guide for details.)
11. Attach four years of currently-valued loss runs. (See Agent Portal <https://agentportal.icwgroup.com/login>, Snap Producer Guide, Attaching Loss Runs for details.)
12. Click **Submit** to submit the application for consideration.

## Uploading with TransactNOW

Before uploading applications with TransactNOW, ensure your system has been correctly set up to integrate with Snap.

**Submissions that don't qualify for Instant Quote** - In order to receive a quote, you need to include four years of currently-valued loss runs included with the submission. Once a quote is accepted, coverage can be bound.

**Instant Quote submissions** - These can receive a quote without four years of currently-valued loss runs, but currently-valued loss runs must be attached to bind coverage.

### TransactNow Version 5.2 or earlier

1. Click on the desired policy.
2. Click on **Link** and select **TransactNOW CL**.
3. Click **Export**.
4. Click **Export** in the dialog box.
5. To complete the submission in Snap, complete all required fields. (See <https://agentportal.icwgroup.com/login>, Snap Producer Guide for details.)
6. Attach four years of currently-valued loss runs. (See <https://agentportal.icwgroup.com/login>, Snap Producer Guide, Attaching Loss Runs for details.)
7. Click **Submit** to submit the application for consideration.

### TransactNOW Version 5.3 and 5.4

1. Click the desired policy.
2. Click the **TransactNOW** icon in the "Policy Summary" list.
3. Select **ICW Group** from the "Carrier list".
4. Check the appropriate box for the transaction you would like to perform.
5. To complete the submission in Snap, complete all required fields. (See <https://agentportal.icwgroup.com/login>, Snap Producer Guide for details.)
6. Attach four years of currently-valued loss runs. (See <https://agentportal.icwgroup.com/login>, Snap Producer Guide, Attaching Loss Runs for details.)



7. Click **Submit** to submit the application for consideration.

## TransactNOW AMS360

1. Click on the **TransactNOW** icon next to the desired policy, or from inside a submission, click **Options** then click **Transact NOW Upload**.
2. Check **Quote Request** for the transaction to be performed.
3. Select **ICW Group** from the “Carrier list”.
4. Click **Submit** to upload data.
5. To complete the submission in Snap, complete all required fields. (See Agent Portal <https://agentportal.icwgroup.com/login>, Snap Producer Guide for details.)
6. Attach four years of currently-valued loss runs. (See Agent Portal <https://agentportal.icwgroup.com/login>, Snap Producer Guide, Attaching Loss Runs for details.)
7. Click **Submit** to submit the application for consideration.

## TransactNOW Prime

1. Click the desired policy.
2. Click the **TransactNOW** icon in the Prime toolbar, or right-click policy and select **Send to TransactNOW**.
3. Select **ICW Group** from the “Carrier list”.
4. Check the appropriate transaction box.
5. To complete the submission in Snap, complete all required fields. (See Agent Portal <https://agentportal.icwgroup.com/login>, Snap Producer Guide for details.)
6. Attach four years of currently-valued loss runs. (See Agent Portal <https://agentportal.icwgroup.com/login>, Snap Producer Guide, Attaching Loss Runs for details.)
7. Click **Submit** to submit the application for consideration.

## TransactNOW Sagitta and Sagitta Online Version 5.9 and Earlier

1. From Maintain mode, click the desired policy.
2. Click the **Import/Export** icon at the top of the page.

3. Select **Export**, then **TransactNOW** to launch TransactNOW.
4. Select **ICW Group** from the “Carrier list”.
5. Check the appropriate transaction box.
6. To complete the submission in Snap, complete all required fields. (See Agent Portal <https://agentportal.icwgroup.com/login>, Snap Producer Guide for details.)
7. Attach four years of currently-valued loss runs. (See Agent Portal <https://agentportal.icwgroup.com/login>, Snap Producer Guide, Attaching Loss Runs for details.)
8. Click **Submit** to submit the application for consideration.

## TransactNOW Sagitta and Sagitta Online Version 6.0

1. Click the desired policy.
2. Click on **TransactNOW Inquiry** icon to launch TransactNOW.
3. Select **ICW Group** from the Carrier list.
4. Check the appropriate transaction box.
5. To complete the submission in Snap, complete all required fields. (See Agent Portal <https://agentportal.icwgroup.com/login>, Snap Producer Guide for details.)
6. Attach four years of currently-valued loss runs. (See Agent Portal <https://agentportal.icwgroup.com/login>, Snap Producer Guide, Attaching Loss Runs for details.)
7. Click **Submit** to submit the application for consideration.

## Uploading with Applied and TAM

**Submissions that don’t qualify for Instant Quote** - In order to receive a quote, you need to include four years of currently-valued loss runs included with the submission. Once a quote is accepted, coverage can be bound.

**Instant Quote submissions** - These can receive a quote without four years of currently-valued loss runs, but currently-valued loss runs must be attached to bind coverage.

1. Open the Applied or TAM agency management system.
2. Highlight the policy to be rated.
3. Click on the **Real Time Butterfly** icon.



4. Select **Rate**.
5. Select **ICW Workers Compensation** from the “Carrier list”.
6. Select **Current** or **Future** options.
7. Click **Go!** to rate. The application will open in Snap.
8. To complete the submission in Snap, complete all required fields. (See Agent Portal <https://agentportal.icwgroup.com/login>, Snap Producer Guide for details.)
9. Attach four years of currently-valued loss runs. (See Agent Portal <https://agentportal.icwgroup.com/login>, Snap Producer Guide, Attaching Loss Runs for details.)
10. Click **Submit** to submit the application for consideration.

## Support information

If you experience any technical issues or have questions about Snap, please contact your Agency’s Snap Administrator. If you continue to experience problems, don’t hesitate to contact Snap Support at **866.975.SNAP** (866.975.7627) or email [snapsupport@icwgroup.com](mailto:snapsupport@icwgroup.com).

## Thank you!

We hope that this guide was helpful to you and we appreciate your partnership.