



## **MI Users Conference Recap**

Here are some of the educational opportunities at this year's conference:

- Workflow efficiency by using Third Party Report Ordering,
- Remote Computing through ASP
- Training tools for MI Comparative Rater
- Training tools for MI Management System
- Product new releases
- ACORD Standards
- Technology Gizmos & Gadgets
- Carriers commitment to Implementing the Picture of the Ideal Workflow
- Paperless – Getting Started
- Personal Lines Workflow

The 2004 MI Users Conference provided over 150 agents, carrier representatives and industry vendors an opportunity to learn, network, and gather materials and information to help build better business through "Implementing the Picture" of the Ideal Workflow. From the opening session Wednesday morning to the break-out conferences in the afternoon, attendees were left to experience anything but a typical conference!

The main highlight at the 2004 MI Users Conference was the industry panel of carriers. More than 120 insurance industry professionals were provided the opportunity to hear how each carrier participates in offering the agent the Ideal Workflow to "Implement the Picture." User Conference coordinators were impressed that so many attendees offered so many words of thanks for providing the 2004 MI Users Conference. We look forward to 2005! For conference presentations and for the photo gallery of the conference, visit the web.

[www.mi-assistant.com](http://www.mi-assistant.com)

## **MI Third Party Report Ordering Update**

-Between June and July, the number of third party reports ordered has increased by 26% over last month for a total of 11,665 transactions in July!

-An additional 65 agencies are now trained and using the new process.

-During July, MI-Assistant released third party functionality for the following carriers, lines, and states:

**AAA Michigan: Credit Auto in IA & MN**

The listed carriers may have other lines, states, credit, MVR, and claims loss information available.

## **MI Management System Training in September**

Our staff has organized three levels of training. Whether you are a new user or an experienced user, the training has been designed to both educate and refresh you with. Enrollment is open to all, for one, two, or all three levels. Each level is designed to allow the user to get the most of your MI Management System. Simply select from the choices below and email [trainings@mi-assistant.com](mailto:trainings@mi-assistant.com) for registration information.

The three levels of training are as follows:

### **Basic System Overview-Level 1 September 27, 2004**

Course Length: 1 Day | Course Cost: \$75

Course Description: Troubleshooting/Answers to User questions, Basic System overview including: Clients, Applications/Forms, Locaters, Memos, Tranlogs, Imaging/Efiling, and Integration. Lunch provided.

## **Marketing & Policy Accounting-Level 2 September 28, 2004**

Course Length: 1 Day | Course Cost: \$75  
Course Description: Marketing, Reports, Tasks,  
Policy Accounting including: Direct Bill and  
Agency Bill. Lunch provided.

## **Accounting Integration-Level 3 September 29, 2004**

Course Length: 1 Day | Course Cost: \$75  
Course Description: Commission Reconciliation,  
Getting Started with Accounting including: Setting  
Beginning balances, Setting up QuickBooks  
Company, and Integration with QuickBooks.  
QuickBooks Overview including Check Writing,  
Deposits, Journal Entries, and Financial  
Statements are also covered. Lunch provided.

For more information on this upcoming  
training to be held at our training center in  
Eleva, Wisconsin, call 715.287.4262 or  
logon to [www.mi-assistant.com](http://www.mi-assistant.com).

## **July Third Party Report Ordering Contest Winner**

**Kurt Golz - AGIS Insurance Center,  
Wausau, Wisconsin**

**Kurt Golz** is July's winner of the Sony  
Under-Cabinet C.D./Clock Radio and a  
\$50 lunch certificate for the office staff.

On July 15<sup>th</sup> at 3:16 p.m., Kurt ordered  
third party reports using MI Comparative  
Rater to quote a client with  
**PROGRESSIVE.**

Now through October 1, 2004, agents  
utilizing the ideal workflow of third party  
report ordering are eligible to win the  
random monthly drawing and the grand  
prize drawing for a 15" LCD flat-panel TV.  
Check out the details on the web.



## **Helpful Hints**

### **Monthly Service Fees for MI Comparative Rater**

Monthly carrier maintenance will not  
change on your monthly statement  
whether you add or delete carriers to your  
rating program. Nearly a year ago, MI  
changed its fee format to this convenient  
billing feature to offer agents more  
flexibility and consistency in maintaining  
their account and budget for each  
monthly payment.

### **Monthly Billing Statement**

Monthly billing statements are sent on the  
15<sup>th</sup> of every month prior to that month's  
service. Your bill is due on the first of  
every month.

### **Submitting timely monthly payments**

To ensure your account does not become  
delinquent, payments should be made by  
the 1<sup>st</sup> of each month. However, in the  
event MI-Assistant does not receive your  
payment the following will apply:

- 30 Days Delinquent** - Agency contacted
- 45 Days Delinquent** - Deactivation of software
- 60 Days Delinquent** - Collection agency

To check your account activity, visit:  
<http://support.mi-assistant.com>, select  
Support Center, then Account Summary.