



MI Users Conference

The Conference to Attend!

Educational opportunities in abundance! From Third Party Report Ordering training and shortcuts to ACORD Standards, you will find yourself bombarded with a multitude of topics to choose from at the 2004 MI Users Conference at Holiday Inn-Campus Area located in Eau Claire, Wisconsin.

Several guest speakers are coming from various regions to this year's conference. Carolyn "Cal" Durland comes from Florida to share "ACORD Standards, Real-Time and the Benefits to Your Agency." Mark Parrish, President of Ajasent, Inc, comes to us from Louisiana to discuss his topic of "Remote Computing." Scott Johnson of PC Solutions out of Minneapolis brings us the newest in technology gizmos and gadgets. Mary Hauri of ICM presents two sessions entitled "Paperless, Getting Started" and "Personal Lines Workflow."

*If that isn't enough, the keynote session will have you on the edge of your seat! Panel members include executives from ACUITY, Couri Insurance, General Casualty, Pekin Insurance, SECURA, and West Bend Mutual. Each representative will provide information on how their unique technology solutions fulfill the need of an **ideal workflow** for the independent agent. Scott Deetz of MI-Assistant will moderate this panel.*

Haven't heard enough? Then sign up now! Go to www.mi-assistant.com for the registration form or call 715.287.4262 to sign up today.

MI Third Party Report Ordering Update

*-Between May and June, the number of third party reports ordered has increased by **113%** for a total of 9,272 transactions for the month!*

*-An additional **113** agencies are now trained and using the new process.*

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

ACUITY: Credit Auto in IA, IL, MN, & WI
Badger Mutual: MVR & Auto Claims Loss in IL & WI

General Casualty: Credit Auto, MVR, Claims Loss Auto and Home in IA, IN, IL, MN, & WI

Hawkeye-Security: Guaranteed Rates for Auto & Home in WI.

The Hartford: Credit Auto, Credit Home in MN
Standard Mutual: Credit Auto & Home, MVR & Auto Claims Loss in IL & IN.

Wisconsin American: Guaranteed Rates for Home in WI

Home Claims Loss:

Austin Mutual - IN & WI

Badger Mutual - IL & WI

General Casualty - IA, IL, IN, MN, & WI

Hawkeye - IA & WI

Integrity - IA, MN & WI

Indiana - IL & IN

Rockford - IL, IN, WI

SECURA - WI, IL, IN, IA, MN

Standard Mutual - IL & IN

Selective - IL, IN, WI

WestBend - WI, IL, IA, MN, IN

Westfield - IA, IL, MN

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

MI Management System Training in September

MI will again offer three levels of training. 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 for registration information.

Basic System Overview-Level 1

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

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

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.

June Third Party Report Ordering Contest Winner

Nancy DeBroux – Manson Insurance Wausau, Wisconsin

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

On June 10th at 3:55 p.m., Nancy ordered third party reports using MI Comparative Rater to quote a client with **General Casualty**.

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 one 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 15th of every month prior to that month's service. Your bill is due on the first of every month.

Submit timely monthly payments

Effective May 1, 2004:

30 Days Delinquent – Notice on statement
45 Days Delinquent - Deactivation of software
60 Days Delinquent - Collection agency

To ensure your account does not become delinquent, payments should be made by the 1st of each month.

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