



## ***User Guide***

FergTech, Inc.  
19 Wilson Ridge Rd.  
Darien, CT 06820-5133  
Tel. 888.627.7807  
Fax. 775.256.3185  
<http://www.fergtech.com>

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## Introduction to AutoIDweb

AutoIDweb Valet Edition is a service provided to the insurance industry that handles the creation and distribution of Automobile Insurance Identification Cards (Auto ID Cards). We are experts with regard to the regulatory requirements of each state and will get your Auto ID Cards to their destination correctly and quickly. This User Manual will provide you with the information you need in order to submit an Auto ID Card project to our staff.

Our goal is complete customer satisfaction. We aim to make the process of requesting and receiving Auto ID Cards for your large commercial accounts efficient and professional.

## Project Submission

This section will explain the what, where, how, and when of submitting projects. We have tried to make the process of submitting a project straightforward and efficient.

### ***What information is required for your project***

There are two parts to submitting a project. The first part includes the administrative details about the project. This part includes who is requesting the project, where to mail the ID Cards upon completion, who to contact with any questions, etc. This information is to be provided using the AutoIDweb Valet Project Submission Form. The second part of a project submission is the data specific to the risk. This data includes Insured, Policy and Vehicles information and is usually submitted to AutoIDweb electronically in the format of a Microsoft Excel worksheet file (.xls). We provide a worksheet template that is used to gather and transport all of the risk data required for your project. Our staff will import this worksheet into our software to process your project request. The following sections describe in detail the required and optional data to be included in the Project Request Form and Risk Data Worksheet.

## Project Submission Form

See Appendix of this guide for the graphical version of this form. The electronic version of this form can be accessed/downloaded from our Internet Website:

<http://www.fergtech.com/AutoIDwebProjectSubmissionForm.pdf>

Field Description	Required?	Data Type
Project Name	Required	AlphaNumeric
Project Contact Office Telephone	Required	AlphaNumeric
Project Contact Mobile Telephone	Optional	AlphaNumeric
Project Contact Email	Required	AlphaNumeric
Alternate Contact Info	Optional	AlphaNumeric
Number of Excel files being submitted (excluding Project Submission form)	Required	AlphaNumeric
Filenames of Excel files being submitted	Required	AlphaNumeric
Sort Output By [State   VIN ]	Required	AlphaNumeric
Lookup issuing company data for policy from Issuing	Required	Yes/No

Field Description	Required?	Data Type
Company NAIC database?		
Use Fleet wording where allowed?	Required	Yes/No
Print quantity of two ID cards per vehicle for all states?	Required	Yes/No
Print two ID Cards per 8.5" x 11" page?	Required	Yes/No
Print ID Cards for VINs that fail validation test?	Required	Yes/No
Ship finished ID Cards to Project Requestor?	Required	Yes/No
Special Instructions	Optional	AlphaNumeric
Delivery Date Requested	Required	Date
Shipping Method Requested [USPS   UPS   FedEx   Messenger]	Required	AlphaNumeric
Requestor's Account # w/Shipper	Optional	AlphaNumeric
Delivery Address	Required	AlphaNumeric

## Insured

Note: This section assumes that you are requesting Auto ID Cards for a commercial lines account. If you have a project for a personal lines account, please contact your AutoIDweb Account Manager at (888) 627-7807.

The electronic version of this form can be accessed/downloaded from our Internet Website: <http://www.fergtech.com/AutoIDwebRiskDataWorksheet.xls>

Field Description	Worksheet Column Name	Required?	Data Type
Insured Type	InsuredType	Required	
Named Insured Line1	OrganizationName1	Required	AlphaNumeric (20)
Named Insured Line2	OrganizationName2	Optional	AlphaNumeric (20)
Federal Employer Identification Number	FEIN	Required	AlphaNumeric (9)
Street Address Line 1	Add1	Required	AlphaNumeric (20)
Street Address Line 2	Add2	Optional	AlphaNumeric (20)
City	City	Required	AlphaNumeric (15)
State	State	Required	AlphaNumeric (2)
Zip Code	Zip	Required	AlphaNumeric (10)
Telephone	Phone	Optional	AlphaNumeric (14)
Fax	Fax	Optional	AlphaNumeric (14)
Insured's Email Address	Email	Optional	AlphaNumeric (50)

## Policy

Field Description	Worksheet Column Name	Required?	Data Type
Policy Number	PolicyNum	Required	AlphaNumeric (20)
Effective Date	EffDate	Required	Date MM/DD/CCYY
Expiration Date	ExpDate	Required	Date MM/DD/CCYY
NAIC Number	NIAC	Required	Numeric (5)
Arizona DOT Number	AZDOT_Num	Optional (NAIC is acceptable)	AlphaNumeric (5)
Florida Ins Co Number	FL_InsCoNum	Required if FL vehicles on policy	Numeric (5)
Kentucky DOI Number	KY_DOI_ID	Required if KY vehicles on policy	Numeric (6)
New Jersey Ins. Co. Code	NJ_InsCoCode	Required if NJ vehicles on policy	Numeric (3)
New York Ins. Co. Code	NY_ICC	Required if NY vehicles on policy	Numeric (3)
Issuing Company Name	InsCoName	Required*	AlphaNumeric (50)

Field Description	Worksheet Column Name	Required?	Data Type
Issuing Company Street Address Line 1	InsCoAdd1	Required*	AlphaNumeric (50)
Issuing Company Street Address Line 2	InsCoAdd2	Required*	AlphaNumeric (50)
Issuing Company City	InsCoCity	Required*	AlphaNumeric (20)
Issuing Company State	InsCoState	Required*	AlphaNumeric (2)
Issuing Company Zip	InsCoZip	Required*	AlphaNumeric (10)
Issuing Company Claims Phone	InsCoPhone	Required*	AlphaNumeric (14)
Comment	Comment	Optional	AlphaNumeric (50)

## Vehicles

Field Description	Worksheet Column Name	Required?	Data Type
Effective Date	EffDate	Optional <sup>†</sup>	Date MM/DD/CCYY
Expiration Date	ExpDate	Optional <sup>†</sup>	Date MM/DD/CCYY
State	State	Required	AlphaNumeric (2)
Fleet	Fleet	Optional <sup>†</sup>	True/False
Model Year	Year	Required (except if Fleet is True)	AlphaNumeric (4)
Make	Make	Required (except if Fleet is True)	AlphaNumeric (15)
Model	Model	Required (except if Fleet is True)	AlphaNumeric (20)
Vehicle Identification Number (VIN)	VIN	Required (except if Fleet is True)	AlphaNumeric (17)
VIN Validation Override	VINoverride	Optional <sup>†</sup>	True/False
Card Quantity	Quan	Required <sup>†</sup>	Numeric (3)
Replacement Vehicle	ReplacementVehicle	Required <sup>†</sup>	True/False
Historical Vehicle (antique)		Required <sup>†</sup>	True/False
Tow Truck	TowTruck	Required <sup>†</sup>	True/False
Use Registrant Information on ID Card	RegUse	Required <sup>†</sup>	True/False
Registrant's Organization Name Line 1	RegOrgName1	Required if RegUse is True and Insured is Commercial	AlphaNumeric (20)
Registrant's Organization Name Line 2	RegOrgName2	Optional	AlphaNumeric (20)
Registrant's FEIN	RegFEIN	Required if RegUse is True and Insured is Commercial	AlphaNumeric (9)
Registrant's First Name	RegFName	Required if RegUse is True and Insured is Personal	AlphaNumeric (16)
Registrant's Middle Name	RegMName	Optional	AlphaNumeric (16)
Registrant's Last Name	RegLName	Required if RegUse is True and Insured	AlphaNumeric (18)

Field Description	Worksheet Column Name	Required?	Data Type
		is Personal	
Registrant's Name Suffix (ex. Jr, III)	RegNameSuffix	Optional	AlphaNumeric (3)
Registrant's Client ID (Drivers License #)	RegClientID	Required for NY state	AlphaNumeric (9)
Registrant's Address Line 1	RegAdd1	Required if RegUse is True	AlphaNumeric (20)
Registrant's Address Line 2	RegAdd2	Optional	AlphaNumeric (20)
Registrant's City	RegCity	Required if RegUse is True	AlphaNumeric (15)
Registrant's Zip Code	RegZip	Required if RegUse is True	AlphaNumeric (10)
Co-Registrant's First Name	CoRegFName	Optional	AlphaNumeric (16)
Co-Registrant's Middle Name	CoRegMName	Optional	AlphaNumeric (16)
Co-Registrant's Last Name	CoRegLName	Required if CoRegFName is not blank	AlphaNumeric (18)
Co-Registrant's Name Suffix (ex. Jr, III)	CoRegNameSuffix	Optional	AlphaNumeric (3)
Co-Registrant's Client ID (Drivers License #)	CoRegClientID	Required if Co-Registrant Name is supplied	AlphaNumeric (9)

†Information will be defaulted if item is left blank in worksheet.

### ***Where to get Forms/Templates for submission***

There are two forms involved in properly submitting an Auto ID Card project.

1. [Project Submission Form](#) (Adobe PDF)
2. [Risk Data Worksheet](#) (Microsoft Excel)

Both templates can and should be completed electronically. You can obtain copies of both templates by accessing/downloading them from our Website using your Internet Browser. Do this by typing the respective links shown below into the Address line of your Browser (or click the link if you are reading this document electronically).

A Microsoft Excel template is used to submit data for projects and can be downloaded from our Internet Website. We also accept data in the XML format. Please contact your Account Manager if you wish to submit XML tagged data.

Enter the following URL into your Web Browser to access/download the Adobe PDF form: <http://www.fergtech.com/ProjectSubmissionForm.pdf>

Enter the following URL into your Web Browser to access/download the Excel template: <http://www.fergtech.com/RiskDataWorksheet.xls>

## ***How to submit your project***

Projects should be submitted via email to [valet@fergtech.com](mailto:valet@fergtech.com) with a Subject line containing the Insured's Name. Your email should contain one attached Project Submission Form and one or more Risk Data Worksheet files containing Insured, Policy, and Vehicle data (one Excel file per policy). Please attach a separate Excel worksheet file for each policy number (example: All-States Policy, Texas only policy, Virginia only policy, etc.). Once we receive your email we will send you a reply email that confirms receipt of your project and assigns your project a unique tracking number. This number can be used to check on the status of your project. If any information is missing or there are any questions about your project submission, we will contact the person who submitted the project.

## ***What are the mailing options for completed projects***

The AutoIDweb staff will have your finished project delivered to any location you specify. There are a few decisions to be made regarding mailing of the finished project.

1. Who will be the recipient of the completed project?
  - a. You; or a colleague
  - b. The Insured (Risk Manager, CFO, Insurance Buyer)
  - c. The Driver of the vehicle
2. What type of packaging would you like the recipient to receive?
  - a. Shrink-wrapped packages of Auto ID Cards (by state or division)
  - b. Individually packaged into window-envelopes ready for mailing
3. Are there any enclosures that should be included with the Auto ID Cards?

If the Auto ID Cards are to be delivered in batches, then you will need to specify which groups of cards go to which location. If the Auto ID Cards will be mailed individually to the driver of a vehicle, then you need to provide the Driver information associating a driver with a specific vehicle (if fleet wording is used, driver only needs to be associated with a state).

## **When will Projects be completed**

Most projects are completed within 72 hours of the complete project being submitted. Exceptions to this rule may be projects that are very large (>25,000 vehicles) or have not been reserved by your AutoIDweb Administrator.

## **Who to contact if you have questions about your project**

If you have any questions or need to contact someone about your project, you have a number of options:

1. You can send an email to [support@fergtech.com](mailto:support@fergtech.com) with your Project Number as the Subject of your email. Include a detailed explanation of your question/comment and the AutoIDweb staff will reply within 24 hours (usually less).
2. You can call the AutoIDweb support staff at (203) 351-8666 24 hours a day, seven days a week.
3. You can contact the AutoIDweb Administrator within your company.