

Tips for a Successful Lexis Nexis Credentialing Process

New Locations, NEW ADDRESS and NEW OWNERSHIP activity will initiate credentialing activity with your agency at Lexis Nexis.

1. Why does Travelers (“TRV”) use Lexis Nexis?

Lexis Nexis provides agents information such as MVR and CLUE reports through TRV quoting systems to help make rating decisions.

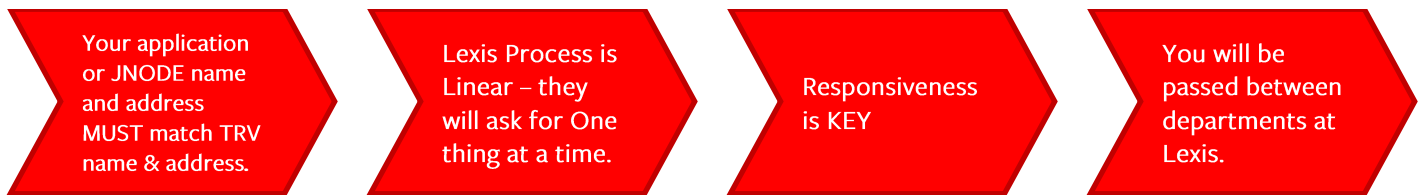
Regulations	TRV Policy
<p>Lexis is held to governmental regulations to protect the personally identifiable data in these MVR and CLUE reports they control and distribute. Lexis must gain comfort that the agent is using the information in legitimate business practices and protecting the data in a secure environment.</p>	<p>TRV is obligated to protect its assets in order to keep our promise to our mutual customers. By having Lexis contract directly with the agent and approve each agency location, Lexis and the agent bear the liability if personally identifiable information is disclosed.</p>

2. Prepare for the Process

Ask the following questions:

- Does the name on your License match your legal entity name?
- If you have a DBA, is it filed with the appropriate Secretary of State or County agency? (Each state has specific rules.)
- Is there an authorized person at the site location being credentialed? If not is there someone there you feel comfortable appointing as a contact for Lexis Nexis?
- Is the authorized person easily reachable by phone and email and will they be responsive?
- Do you have other related parties in the same agency location? Are the ownership documents properly filed with these other parties and is there common ownership? Is your area secured?
- If there are other entities – is your current name on the lease or sublease and is it fully executed?
- If your property manager of your lease has changed, is there an addendum showing that change?
- Is your online address and phone number presence consistent with your application and current name?
- Does your physical signage match your application name or DBA?

3. Expected Process with Lexis



- 1) Your legal name and address on the Lexis application or current jnode account must match what Travelers has on file either through the NetAppoint you provide or Travelers records of your name and location in our systems. (You are responsible to keep records updated.)
- 2) Once everything matches your application will proceed to Lexis Nexis Credentialing. Lexis MAY request the following:
 - a) Lease or Utility bill to confirm your location. Your agency name and address should be on this document.
 - b) If you provide a Lease – Lexis will contact your landlord to verify your lease.
 - c) Lexis may contact the authorized person using the phone number of the location on the application.
 - d) A site inspection and will seek approval for the site inspection. Then their third-party inspection vendor will contact you to schedule a date and time.
 - e) Ownership documents and or DBA filing documents.
 - f) A producer agreement with your Master level agency if one exists.
 - g) Information about your email domain.
 - h) A “REMEDY LETTER” to confirm information or provide certification that any requested compliance issues were addressed. Most commonly, to install a locking door; or to confirm ownership relationships.
 - i) When credentialing is “done” they will pass you to their Quality Assurance Department. Your application could be sent back to credentialing for more information. You are not done until you receive an email welcoming you to Lexis.

Over 70% of our Agents will complete this process in under 11 Days.

4. Dos and Don'ts in the Process

DOs	DON'Ts
<ul style="list-style-type: none"> Respond promptly Provide fully executed documents Ensure that your DBA is filed with the appropriate state or county entity and that it is current and not expired – the DBA on your license may not be sufficient in your state. Contact TRV resources listed on the next page if you have questions. 	<ul style="list-style-type: none"> Don't provide a PO box – must be the physical address of your agency operation, where information is processed. Don't provide more than what is asked for. Lexis has to credential everything you give them. Don't provide a lease that is less than nine-month term. Month to month leases will not be accepted.

5. Other

- It is important that your authorized person who is responding is responsive. Lexis will only request or try to reach out three times through phone and/or email before they will withdraw from your application. It is imperative that you respond.



Please be cognizant of time zone differences. Most of Lexis Nexis offices are located in the Eastern Time Zone.

- Lexis wants to ensure security of the data. Access to your operational space is heavily scrutinized. Example: Residential multi-tenant locations are not acceptable at this time. (Example: Apartment where landlord has access.)
- In the event you are declined by Lexis Nexis, they may not share information with you on why you were declined. Lexis Nexis never shares the reason for your declination to Travelers.
- If you are dedicated to applying again we strongly recommend that you call on the resources below at Travelers to review your case before you try again.
- Travelers requires a Lexis Nexis account for an appointment. If you are unable to secure a Lexis Nexis account, your appointment with Travelers will be terminated.

6. Resources



The Lexis Nexis processing teams are not allowed to “coach” you through the process. If you have questions or concerns, please reach out to the following resources.



Your Travelers Personal Insurance Sales Executive can direct you to the appropriate contact.



Travelers Agency Admin: AA360@travelers.com