Streamline New and Renewal Submissions with Electronic Data Interchange

Make your application submissions time-efficient and easy! The Electronic Data Interchange (EDI), accessible from our Broker Portal, streamlines the process of sending and receiving new and renewal submissions between your business and ours.

Start with the Applications tab, then select EDI. From there, you can either select to enter a new EDI Application or select Pending Applications.

https://secure.insurancefornonprofits.org/streamline-submissions-with-EDI

Once you've started or opened an existing application, you can follow the remainder of the steps on EDI.
Advantages of using EDI:

- **Guidance throughout the application process** with the EDI Application Wizard. The whole application is divided into bite-sized pieces, and the wizard guides you through each screen one at a time until you’ve completed the entire application.

- **More accurate submissions.** You can collaborate with your clients by asking them to complete forms, eliminating waiting time. And if you’re submitting a renewal, the application is pre-filled so downloading and editing is reduced.

- **Faster turnaround times.** Not only does EDI eliminate the paper chase, it also speeds up the process. If you’re using an agency management system, after you upload your application data, we will pre-populate the application forms with the data that you’ve sent to us, saving you time and making your life much easier.

You have two options to get started:

1) Broker Services can set you up to upload application data from supported agency management systems, such as Vertafore/AMS or Applied. With the click of a button, your data populates automatically into our system.

2) Once you’re already set up on the NIA Broker Portal, you can go to Applications, then click EDI, and you’ll see an option to enter a new EDI application from scratch. From there, you can conveniently create, edit, review, and submit applications.

Login to the Broker Portal to access our Quick Start Guide for detailed steps!

If you have any questions about EDI, please don’t hesitate to reach out to Broker Services at 800-359-6422 ext. 6021 or brokerservices@insurancefornonprofits.org with any questions or concerns.

Documents Referenced:

To learn more about the Broker Portal, see “Working with Us / Broker Portal.”

Be sure to attend our Broker/CSR Webinar to learn about submitting applications.