

<b>Section Name</b>	<b>Field Name</b>	<b>Field and/or Section Description</b>
<b>TITLE</b> ACORD 812 (2006/02)	<b>Agency Questionnaire</b>	This form is used to collect information that is commonly required of agencies to provide to their carriers.
<b>IDENTIFICATION SECTION</b>	<b>Date (MM/DD/YYYY)</b>	Month/day/year on which the form is completed. (MM/DD/YYYY)
<b>IDENTIFICATION SECTION</b>	<b>Agency</b>	The name and address of the main agency location.
<b>IDENTIFICATION SECTION</b>	<b>Primary Contact</b>	The primary contact that should be used by the carrier to contact the agency.
<b>IDENTIFICATION SECTION</b>	<b>Phone (A/C, No, Ext)</b>	Producer's telephone number.
<b>IDENTIFICATION SECTION</b>	<b>Fax No. (A/C, No, Ext)</b>	Producer's fax number.
<b>IDENTIFICATION SECTION</b>	<b>E-Mail Address</b>	Producer's e-mail address.
<b>IDENTIFICATION SECTION</b>	<b>Website Address</b>	Producer's website address.
<b>IDENTIFICATION SECTION</b>	<b>Fiscal Year End</b>	The date of the producer's fiscal year end.
<b>IDENTIFICATION SECTION</b>	<b>Nat'l Producer Number</b>	The identifier assigned to an individual producer/agent/broker/agency by the NAIC.
<b>IDENTIFICATION SECTION</b>	<b>Contract Number</b>	The producer's contract number with the carrier. This is also known as the Agency Code.
<b>IDENTIFICATION SECTION</b>	<b>FEIN</b>	The producer's Federal Employer Identification Number.
<b>IDENTIFICATION SECTION</b>	<b>City Population</b>	The population of the city of the main agency location.
<b>E &amp; O</b>	<b>Carrier</b>	The name of the producer's Errors and Omissions carrier.
<b>E &amp; O</b>	<b>Expiration Date</b>	The expiration date of the producer's E&O policy.
<b>E &amp; O</b>	<b>Limits - Ea Claim</b>	The per claim limit on the producer's E&O policy.
<b>E &amp; O</b>	<b>Limits - Ea Occ</b>	The per occurrence limit on the producer's E&O policy.
<b>E &amp; O</b>	<b>Limits - Aggregate</b>	The aggregate limit on the producer's E&O policy.
<b>AGENCY PROFILE</b>	<b>Name</b>	The agency employee's name. Repeat the employee's information for each state in which they are licensed.
<b>AGENCY PROFILE</b>	<b>Title</b>	The agency employee's title.
<b>AGENCY PROFILE</b>	<b>E-Mail Address</b>	The agency employee's e-mail address.
<b>AGENCY PROFILE</b>	<b>Hire Date</b>	The hire date of the agency employee.

<b>Section Name</b>	<b>Field Name</b>	<b>Field and/or Section Description</b>
<b>AGENCY PROFILE</b>	<b>Professional Designations</b>	The description of designations the agency employee has received.
<b>AGENCY PROFILE</b>	<b>P &amp; C Agency License Number</b>	The employee's P&C License Number.
<b>AGENCY PROFILE</b>	<b>P &amp; C Broker License Number</b>	The employee's P&C Broker Number.
<b>AGENCY PROFILE</b>	<b>Life &amp; Health License Number</b>	The employee's Life & Health License Number.
<b>AGENCY PROFILE</b>	<b>State</b>	The state the employee's license is applicable to.
<b>AGENCY/BRANCH OFFICES</b>	<b>Agency/Branch Name and Address</b>	The name and address of additional agencies and branches associated with the main agency.
<b>AGENCY/BRANCH OFFICES</b>	<b>Primary Contact</b>	The primary contact that should be used by the carrier to contact the agency/branch.
<b>AGENCY/BRANCH OFFICES</b>	<b>Phone (A/C, No, Ext)</b>	Producer's telephone number.
<b>AGENCY/BRANCH OFFICES</b>	<b>Fax No. (A/C, No, Ext)</b>	Producer's fax number.
<b>AGENCY/BRANCH OFFICES</b>	<b>E-Mail Address</b>	Producer's e-mail address.
<b>AGENCY/BRANCH OFFICES</b>	<b>Website Address</b>	Producer's website address.
<b>AGENCY/BRANCH OFFICES</b>	<b>Fiscal Year End</b>	The date of the producer's fiscal year end.
<b>AGENCY/BRANCH OFFICES</b>	<b>Nat'l Producer Number</b>	The identifier assigned to an individual producer/agent/broker/agency by the NAIC.
<b>AGENCY/BRANCH OFFICES</b>	<b>Agency License Number</b>	The producer's license number.
<b>AGENCY/BRANCH OFFICES</b>	<b>FEIN</b>	The producer's Federal Employer Identification Number
<b>AGENCY/BRANCH OFFICES</b>	<b>City Population</b>	The population of the city of the main agency location.
<b>AGENCY/BRANCH OFFICES</b>	<b>Carrier</b>	The name of the producer's Errors and Omissions carrier.
<b>AGENCY/BRANCH OFFICES</b>	<b>Expiration Date</b>	The expiration date of the producer's E&O policy.
<b>AGENCY/BRANCH OFFICES</b>	<b>Limits - Ea Claim</b>	The per claim limit on the producer's E&O policy.
<b>AGENCY/BRANCH OFFICES</b>	<b>Limits - Ea Occ</b>	The per occurrence limit on the producer's E&O policy.

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AGENCY/BRANCH OFFICES	Limits - Aggregate	The aggregate limit on the producer's E&O policy.
AGENCY PREMIUM / MIX OF BUSINESS	Company	List all carriers that the agency writes business with.
AGENCY PREMIUM / MIX OF BUSINESS	Commercial Lines Volume	Enter the premium volume of the agency (in dollars) attributed to commercial lines policies with the carrier.
AGENCY PREMIUM / MIX OF BUSINESS	Personal Lines Volume	Enter the premium volume of the agency (in dollars) attributed to personal lines policies with the carrier.
AGENCY PREMIUM / MIX OF BUSINESS	Life & Health Volume	Enter the premium volume of the agency (in dollars) attributed to Life & Health lines policies with the carrier.
AGENCY PREMIUM / MIX OF BUSINESS	Loss Ratio	Enter the loss ratio with the carrier for the line of business.
AGENCY PREMIUM / MIX OF BUSINESS	Interface - Download	Check this box if the carrier offers download for the line of business.
AGENCY PREMIUM / MIX OF BUSINESS	Interface - Upload	Check this box if the carrier offers upload for the line of business.
AGENCY PREMIUM / MIX OF BUSINESS	Interface - Real-Time	Check this box if the carrier offers real-time interface for the line of business.
AGENCY PREMIUM / MIX OF BUSINESS	Interface - Website	Check this box if the carrier provides a website to process this line of business.
TECHNOLOGY INFORMATION	Vendor Name	The name of your agency automation system vendor (e.g. Applied Systems, DORIS,etc.)
TECHNOLOGY INFORMATION	System Name	The name of your agency automation system (e.g. TAM, FILESERVEROnline, etc.)
TECHNOLOGY INFORMATION	Model	Enter the type of system model your agency is using (e.g. LAN, Local, ASP).
TECHNOLOGY INFORMATION	Version	Enter the version of agency automation software that your agency is currently running.
TECHNOLOGY INFORMATION	# Workstations	Enter the number of licensed workstations running the agency automation system software.
TECHNOLOGY INFORMATION	Minimum System Speed	The system speed in megahertz.
TECHNOLOGY INFORMATION	Server Operating System	Enter the operating system that is running on your server.
TECHNOLOGY INFORMATION	Browser	Enter the name of the internet browser used in your agency (e.g. Internet Explorer)

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TECHNOLOGY INFORMATION	Browser Version	Enter the version of the internet browser used in your agency.
TECHNOLOGY INFORMATION	User Group Name	Enter the name of the user group from the Agency Automation System.
TECHNOLOGY INFORMATION	Active Member	Check "Yes" if you are an active member of the user group. Click "No" if you do not participate in the user group.
TECHNOLOGY INFORMATION	Do you pay technical support?	Check "Yes" if you are currently paying support fees for your agency automation system. Click "No" if you are not paying support fees for your agency automation system.
TECHNOLOGY INFORMATION	Describe other support	Describe any other support that your agency receives.
TECHNOLOGY INFORMATION	Date last patch installed	Enter the date you last installed an update to your existing version of agency automation system software.
TECHNOLOGY INFORMATION	Date last version upgrade was installed.	Enter the date you last upgraded to a complete new version of agency automation system software.
TECHNOLOGY INFORMATION	Agency staff that participate regularly in day-to-day use of agency automation system for sales and/or service	Check the boxes next to all agency personnel that work in the agency automation system on a day-to-day basis.
TECHNOLOGY INFORMATION	Type of connection to the internet.	Check the box next to the type of internet connection used in the agency.
TECHNOLOGY INFORMATION	Rating Vendor Name	If your agency uses a comparative rater, enter the rating system vendor name.
TECHNOLOGY INFORMATION	Rating System Name	Enter the system name of the rating software used in the agency.
TECHNOLOGY INFORMATION	Key Agency IT Contact(s)	Enter the name(s) of the key agency information technology contacts.
TECHNOLOGY INFORMATION	E-Mail Address	Enter the e-mail address(es) of key agency information technology contacts.
GENERAL INFORMATION	Does every employee in your agency have a work station with access to: a) Internet, b) e-mail, c) agency automation system.	Check "Yes" next to each question that applies to all workstations within your agency. Check "No" next to each question that does not apply to all work stations within your agency.

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<b>GENERAL INFORMATION</b>	<b>Does your agency input policy and transactional detail for only specific types of business?</b>	Check "Yes" if you do not enter full detail in your agency automation system for all lines of business.
<b>GENERAL INFORMATION</b>	<b>Does your agency plan on changing your agency automation system vendor within the next year?</b>	Check "Yes" if you are planning on shopping for a new agency automation system within the next year.
<b>REMARKS</b>	<b>Remarks</b>	Enter any additional comments you would like the carrier to receive.
<b>AGENCY LICENSE NUMBERS</b>	<b>Agency #</b>	Enter the agency number used to identify the agency in the agency automation system. Repeat the agency/branch information for each state in which the agency/branch is licensed.
<b>AGENCY LICENSE NUMBERS</b>	<b>Branch #</b>	Enter the branch number used to identify the branch in the agency automation system.
<b>AGENCY LICENSE NUMBERS</b>	<b>Agency/Branch Name</b>	Enter the name of the agency/branch.
<b>AGENCY LICENSE NUMBERS</b>	<b>License Number</b>	Enter the agency/branch license number.
<b>AGENCY LICENSE NUMBERS</b>	<b>State</b>	Enter the state that issued the license number.