# “Go paperless” program

saif
Work. Life. Oregon.

Access your agency’s copy of policyholder documents online. Instead of receiving paper documents in the mail, you’ll receive them online in your agency inbox. Please note that state law may require us to send certain documents by regular mail.

### What are advantages of going paperless?

Turning paper off saves time, reduces waste, protects our environment, and enhances customer service. Keep in mind that by receiving documents online, you can access them at anytime from anywhere.

### Who can enroll in paperless?

A Business Online agency-level user can enroll in paperless for his or her agency. Paperless enrollment effects the entire agency, which means all documents for everyone at the agency, regardless of location, become electronic. Typically, there is one person at your agency who is authorized to make this decision. If you are unsure who that is, check with your agency administrator or contact us.

### What types of documents will I receive online when I’m paperless?

You’ll receive your agency’s copy of policyholder documents online. For example, if we send you a paper copy of your client’s renewal documents, you’ll now receive the renewal documents online in your agency inbox. Other types of documents available online include new business, cancellations and intents, premium audit results, ER mods, class additions and deletions, and much more.

### What documents will I continue to receive by mail when I’m paperless?

Your agency will continue to receive the policyholder’s paper copy of documents for regional accounts, which you (the agent) are responsible for delivering. Service center policyholder documents are mailed directly to the policyholder.

### Who can access my agency’s documents online?

Agents and producers with access to Business Online can access and view documents in the agency inbox. Producers with producer-level access can only access documents for their book of business.

### Can I revert back to receiving paper later?

It’s possible, but we don’t recommend it. If paperless is not working for your agency, or if you have questions about the process, we want to hear from you. Please contact us.

## AGENCY INBOX

### What is the agency inbox?

As a paperless agency, you are provided with an electronic inbox (agency inbox) through SAIF’s Business Online website, where you can access and retrieve your copy of policyholder documents online. Documents will be delivered once per day and made available in PDF for easy access.

### How do I use the agency inbox?

New documents appear as unread. By clicking on the document icon to view the contents of a document, you are changing the status to ‘read’– mimicking the concept of an email inbox.

Agency inbox filters help you find what you are looking for quicker:

**View** Unread/All—Defaults to unread. Click ‘All’ to view both read and unread documents in the grid.

**Days** 15/30/45—The number of days in view defaults to 15 days. To see older documents, click on 30 or 45 days.

(Continued)

### Have questions?

If you have questions about our paperless program contact our help desk at **866.836.8300** or **helpdesk@saif.com** to learn more about your options.

**Mail for** Defaults to 'All Agency.' Select a producer from the list and the page will filter to show only the selected producer's documents.

**Note: This filter is only available to agency-level users. Producers only see the documents for their book of business.*

### How long will documents display in the agency inbox?

Documents are available online for 45 days from the document date. After that they'll no longer be available, but you can still find a historical list of documents by policy number on the Policy Documents page.

## POLICY DOCUMENTS

### What is the purpose of "Policy Documents"?

"Policy Documents" is in your Business Online menu which provides you with an electronic inventory of all documents delivered to the policyholder. Think of Policy Documents as an archive or historical library of everything we've sent to the policyholder on paper.

### How can I use Policy Documents?

Policy Documents is intended for both agents and producers, whether paperless or not, to access policyholder documents online for the purpose of helping your clients when they have questions about their coverage, endorsements, billing (yes, you can now view invoices online) and other coverage documents.

### How is the agency inbox different from Policy Documents?

The agency inbox and Policy Documents do share most of the same documents; however, there are some differences as well as functionality. The agency inbox is designed much like a mail processing center. Documents get delivered online, they are processed (saved), and then they go away after 45 days. Policy Documents functions more like a document archive. It's everything the policyholder receives by mail. There is no limit to the number of days the documents are available. Policyholders do not have access to Policy Documents online.

## EMAIL NOTIFICATION

### What is email notification?

Email notification is a feature offered to any Business Online registered user of a paperless agency. It allows users to turn on daily email notifications which notify users when new documents become available online.

### How do I turn on email notifications?

From your agency homepage, find the section called Document preferences, review the displayed email address for accuracy, and click the Turn on button to begin receiving email notifications. The first email will be sent as soon as new documents have been delivered to your agency inbox. To turn off notifications, simply repeat these steps, and click the Turn off button—which doesn't appear until you hover over your email address with the mouse.

### Can anyone at my agency receive notifications?

Yes. Email notifications are offered to all Business Online users of a paperless agency. Remember, if you are a producer of the agency, you'll only get notified when documents in your book of business are available online. Agency-level users will get notified for all documents available to the agency.

### How often will I get notified?

You will receive one email per day when you have new documents available online—even if you have more than one policy and multiple documents.

### I need to change the email address where I receive notifications.

To update your email address, click My profile at the top of your homepage, edit your email address, and save your changes.