

Allocator Agent – Frequently Asked Questions

Jurisdiction Determination

Q. Describe how the software determines whether an address is inside or outside of the city limits (via zip code, geocode, postal address, etc.).

A. Premium Pro Allocator and Agent use a 3rd party GIS geo-coding product. The software incorporates the USPS zip+4 product to determine if an address falls within a legitimate address range. The geocoding is based on the most precise coordinates that are available for the address.

Q. How often is the standardizing data used by the software updated?

A. Quarterly

Q. Describe how the software responds to an “invalid” address (i.e. an address it cannot identify the location/jurisdiction). Are several response codes available to help determine why it was not found?

A. The software does not have a problem identifying the location or jurisdiction for an address. To be specific, a matching address range cannot be found based on the information provided. If a close matching address is not found, the software will either return the message "no close match" or "no candidates found". The software will not return a matching address in either situation. To maximize the possibility of a close match, your company (when integrating the Agent product with you own systems) needs to prevent a user from transmitting an incomplete address (Address, City, State, and Zip Code must be transmitted).

Q. What data is needed as input to the software: street, city, state, zip, county?

A. You should always provide street number, street name, state and zip code. A match may be made if you omit the city or zip code (you cannot omit both), but you decrease the likelihood when doing so (should there be an error in the city name or zip code). The county information is not needed.

Q. Is jurisdiction determination available for any other states?

A. At this time, we only offer KY in our web based format.

Q. Does your software include a stand-alone look-up mechanism (screen? Web page?) that can be used by business users to enter an address and get the taxing jurisdictions for manually processed policies?

- A. The product is designed to interface with your in house system or in house web base solution (such as a company website). There is an input screen that can be accessed from a web browser.

Tax Rate Determination

Q. Are the tax rates for all of Kentucky's premium categories (Casualty, Inland Marine, etc.) included?

A. Yes

Q. Does the software determine and return the applicable tax rates by effective date or does it only return the rates in effect as of the date of the call?

A. If you provide an effective date, it will use that date. Otherwise, it will default to the current date.

Q. What data is needed as input?

A. The effective date of the policy (optional), complete address, password, and ID must be transmitted by you in order for Agent to transmit the address.

Q. Does the software calculate the tax amount, or only return the tax rates?

A. It does not calculate the tax amount, it returns the applicable tax rate.

Q. When are the tax rate updates provided by Kentucky applied? How long does it take those updates to reach the users of the software?

A. The new bulletin is typically issues during the first 2 weeks of April. Agent will be updated at the end of April.

Scenarios

Q. What happens if no taxes apply at all?

A. The county information will be returned, but no tax rate is returned.

Q. Does your software adjust the tax rates to account for premiums that must be reported to both the county and the city? The Kentucky annual bulletin has special instructions for county returns that must be filed with a LGT 142 and for those counties that are "grandfathered".

A. Yes. A effective tax rate is returned that accounts for the additional tax due.

Technical

Q. Is the software set up as a Web Service?

A. Yes

Q. What online protocols are supported?

A. Soap 1.1, Soap 1.2, HTTP Get, HTTP Post (Please access the website for more information).

Q. What is the average online response time?

A. That is dependent on the number of hits per second. At this time, our response time is unaffected by the amount of traffic we are receiving. We can send you stress tests for your review that simulate 20 or 100 simultaneous users.

Q. Is it the intent of your company to pursue certification with the state of Kentucky for tax jurisdiction determination? What is your timeline to apply for/obtain certification?

A. Yes. The state of Kentucky has began to process applications. We are currently working on our data set per the requirements of the verification manual and expect to have it completed by May.

Q. What is the price of the software based on: is it transaction count, policy count, etc.?

A. Transaction count

Q. What Production support is included with the software?

A. TriTech provides support during normal business hours: M-F, 8 to 5 CST. We will answer any questions about the application or make any necessary corrections. We don't provide support to help you integrate the results we transmit with your in house systems or websites.