Producer Lifecycle Management™ (Producer Manager™/Producer Express™)

Version: 5.11

Production Release Date: November 19, 2011

Overview

Producer Lifecycle Management™ version 5.11 will be released to the production environment on Saturday, November 19, 2011.

Note: Detailed instructions for using new Producer Lifecycle Management™ Producer Manager™ or Producer Express™ features and downloadable versions of product release notes will be available in the online help with the production release of this version.

The following are highlights of the changes in this production release:

- Automated data reconciliation of course completions

- Producer Express request routing and owner management

Training

Prior to the production release of this version, Vertafore will present a training webinar to introduce our customers to some of the new features. Vertafore will announce the specific date and time of the release training webinar in a separate notification.

If you or your staff want custom training on Producer Lifecycle Management™ or any Vertafore application, please ask your Vertafore sales representative about our training services.

Enhancements

The following are detailed descriptions of the specific enhancements in this production release:

Automated Data Reconciliation

- **Massachusetts appointments:** Previously, Massachusetts data on thenational Producer Database (PDB) included only a single, "generic" appointment line. For this reason, Producer Manager could not determine from PDB information alone the lines for which a producer was appointed. Therefore, automated data reconciliation did not sync Massachusetts appointments information.

    Massachusetts now reports appointment lines to the PDB, and so Producer Manager now can sync Massachusetts appointments by line. [MKT-8953]

DTCC Integration

- **DTCC File Validation:** The DTCC now sends the number of lines in a DTCC file. Producer Manager now will validate that number against the actual number of records in the file. [MKT-8972]

Education & Training

- **Product-Specific Training Programs:** Producer Manager now can sync product-specific course completions for user-created, product-specific education credential programs. [MKT-8897]

- **Improved Education Syncing:** Producer Manager now can obtain continuing education course completions as part of an automated data reconciliation. Previously, Producer Manager would obtain course completion information directly from a state database and add any additional product-specific training course completions available from the Vertafore Approved Provider Network (VAPN) education bank.

  Now, Producer Manager will pull general (i.e., non-product-specific training) course completions from the VAPN that are not recorded at the state. This will ensure that producer records are updated with all course completions, including those not submitted to a state. [MKT-8896]

Producer Onboarding

- **Reassigning Requests:** Occasionally an onboarding request needs to be reassigned from one recruiter to another for completion. The Producer Express recruiter module now will allow recruiters and "superusers" to reassign requests.

  - A recruiter now can reassign a lead or onboarding request to another recruiter. First, open a lead or request record, and then select the Reassign Request option from the Available Tasks dropdown menu. Then, on the Reassign Requests page, select a different recruiter to which to reassign the lead or request. Note that the recruiter to which you last reassigned a lead or request is pre-selected by default. [MKT-565]

  - For a "superuser" (i.e., a user with the Access to All Queues security permission), the Filter Options section now includes a dropdown menu that can filter requests displaying in the Workspace by the current request owner. [MKT-8916]

  - A superuser now can reassign requests in bulk within the same region. First, filter the list of requests by queue type. Then, click the Bulk Reassign: all # request(s) link to bulk reassign all requests in that region. [MKT-8914]

- **User Security Enhancements:** When a recruiter sends an onboarding evite to a producer, the producer receives an email containing a hyperlink to log into Producer Express to request a password. The producer then receives a password in a second email. For improved security, the system-generated password now is temporary, and after logging in the producer must create a new, personalized password. [MKT-8947]

Miscellaneous

- **Carrier Requests Product Type:** Producer Manager now will allow Carrier Requests to be added without specifying a product type. Note: The Carrier Requests page is available only for agency installations of Producer Manager. [MKT-9006]

- **Usability Enhancement:** Error and warning messages in Producer Express have been updated to improve usability. The fly-out error messages have been replaced by a static message box that displays at the top of the page. [MKT-546]

Bug Fixes

The following is a log of bugs that have been fixed in production since the last Producer Lifecycle Management™ release notes:

- Producer Manager occasionally was displaying packets as active when they actually were closed or processed in Producer Express. [MKT-7879]

- A user was unable to use navigation links more than six times on a report in Producer Express. [MKT-8132]

- Some help links in the Producer Manager Administration menu and on the Review/Update User page were broken. [MKT-8876, MKT-9007]

- Producer Express requests were being routed incorrectly in certain workflows when the packet type was changed. [MKT-8991]

- The Add New Jurisdiction Series link on the Maintain FINRA Information page in Producer Manager was labeled incorrectly. [MKT-8997]

- The Complete Contract button on the Finalize tab in Producer Express was not displaying on certain requests. [MKT-8973]

- Under certain conditions, terminating an available appointment for a writing company in Producer Manager would fail, leaving the appointment active. [MKT-9030]