Release Notes

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

Version: 5.9

Production Release Date: June 25, 2011

Overview

Producer Lifecycle Management™ version 5.9 was released to the production environment on June 25, 2011.

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

- Support for DTCC Training Update (TU) transactions
- Miscellaneous usability and customer satisfaction improvements

Training

Vertafore is presenting online videos to introduce our customers to some of the new features in this release. Vertafore will include hyperlinks to the training videos in a separate notification.

In the meantime, 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:

Administration

- **Code Use Indicators**: The following enhancements were made in Producer Manager to the former Use Indicators page:
  - The page has been renamed the Code Use Indicators page.
  - Other references on the page to Use Indicators have been changed to Code Use Indicators.
  - To open the Code Use Indicators page, from the Administration menu select Configure System, and then select View Code Use Indicators.
  - The Code field has been added to the search filter criteria, allowing you to narrow the search results to a specific code.

– The search results now can be sorted by code. Click the Code column heading in the search results to sort the results by code in ascending order; click again to re-sort in descending order, etc. [MKT-8005, MKT-8077]

Appointments & Terminations

- **Select Multiple Appointing Companies for Carrier Requests**: For agency customers, the Carrier Requests feature in Producer Manager allows you to record appointment requests that are sent to carriers. Now, you can include multiple carrier writing companies as part of a carrier request. Formerly you could either record the request at the carrier level or for a single writing company. The Company dropdown menu on the Carrier Requests page has been changed to a multi-select box, allowing you to press the CTRL key and click to select multiple writing companies for a single request.

  A carrier request involving multiple appointing companies will display where available throughout the system, including the Carrier Requests data section of an individual or firm record on the Review/Update Producer page or in the output of the Carrier Requests Inquiry. [MKT-7765]

Business System Integration

- **Course Completions in Transaction Data Web Service**: Education and training course completion information now is available in a response from the Producer Express Transaction Data Web Service (a.k.a. Contract Data Extract).

  Details of this change are documented in the Transaction Data Web Service Technical Change Notes, which is distributed separately.

  Note: Your company's deployment of Producer Express must be Vertafore-configured to include course completion information in the Transaction Data Web Service. Contact your Vertafore representative for assistance. [MKT-8548]

Correspondence & Notifications

- **LOAs Included in Notification Emails**: License Renewal and Expired License Notifications in Producer Manager now will include the qualifications (lines of authority or LOA) related to the license, for easier reference and tracking. [MKT-8491]

DTCC Integration

- **DTCC TU Support**: Carriers responsible for tracking annuity and long-term care (LTC) education for their producers can now receive course information from education providers through integration with the Depository Trust & Clearing Corporation (DTCC). Producer Express now can accept DTCC Training Update (TU) transactions and automatically update producer records in Producer Manager with the course completion information provided in the DTCC TU [[MKT-8135, MKT-8498, MKT-8452, MKT-8453, MKT-8454, MKT-8456, MKT-8462, MKT-8562]

Producer Data Management

- **Address History**: The Address History data section on individual and firm records open in the Review/Update Producer page in Producer Manager has been restyled to resemble more closely other data sections on the page. [MKT-7367]

Miscellaneous

- **Additional Identifying Producer Information**: To help you differentiate among otherwise identical producers, now each producer listed on the following pages in Producer Manager is identified by resident state(s), Social Security Number/Federal Employer Identification Number, external system ID, and business unit:

  – Data Reconciliation Requests

  – Producers With Missing Information

  – Administer Producer Business Rules/View Producers With Custom Values

  For a producer with multiple business units, all business units will display and the business unit marked as "default" will appear first. For a producer with multiple external system IDs, the ID marked as "preferred" will display.

  Note: To view the additional producer information, a user must be assigned to a security role with the permissions enabled to view resident states, SSN/EIN, external system IDs, and business units. Identifying information does not display for a producer whose record lacks the information. [MKT-8117]

- **Transfer Associated Individuals**: On the Transfer Associated Individuals page in Producer Manager, the warning message has been updated to include an alert that an alias will be created for the Destination Firm. [MKT-8411]

Bug Fixes

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

- On the Review/Update Producer page, clicking the missing information flag for Contact Information was resulting in an error. [MKT-8554]

- Stopping a partially completed request in the Producer Express recruiter module and then creating a new request was re-opening the stopped request. [MKT-8485]

- Searching by staff member name on the Review Rejected Appointments page in Producer Manager was not retrieving results if the staff member's user name was capitalized. [MKT-8443]

- A producer record containing address history information could not be retrieved through a producer search on the Maintain Address History page in Producer Manager. [MKT-8396]

- In the Address History data section of the Review/Update Producer page, a user was unable to edit or delete existing addresses. [MKT-8395]

- Invalid formatting in the Height and Weight fields on the Review/Update Producer page in Producer Manager was not being validated properly. [MKT-8288]

- The Required Items Inquiry in Producer Manager was failing if a Staff Member was selected as a filter criterion. [MKT-8140]

- The validation error messages on the Maintain Locations and Departments page in Producer Manager were incorrect. [MKT-8091]

- In Producer Manager, when a state and county level appointment was requested in Florida , a duplicate Florida state appointment request was being generated. [MKT-4792]

- An automated data reconciliation in Producer Manager could not retrieve a course completion record from a Sircon State in which the education provider's name contained an equals sign (=). [MCX-3450]

- Background investigation requests submitted through Producer Express were erroneously receiving an Error status. [MKT-8620]

- The Outbound Data Feed was not transmitting all of the XML files generated in a run to the secure FTP site for customer retrieval. [MKT-8608]

- Clicking the Submit a License Application link in the Licenses/Qualifications section of a firm producer record in Producer Manager was causing an unknown exception. [MKT-8472]