



# Release Notes

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

**Version: 6.2**

**Production Release Date: November 17, 2012**

### Overview

Producer Lifecycle Management™ version 6.2 will be released to the production environment on November 17, 2012.

**Note:** Detailed information about 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 release:

- New Producer Express Integration Option
- Updated Texas Annuity Education Credential Program
- New Vertafore Color Scheme for Producer Manager

### 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 would like 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 release:

#### *Business System Integration*

- **Onboarding Request Web Service:** A customer system now can directly initiate a producer onboarding request in Producer Express.

Before, it was necessary for a user in a recruiter role to manually send an onboarding “e-vite” to a potential new producer. But now a customer relationship management (CRM), human resources (HR), or other system can transmit all of the information needed to start the onboarding process automatically through a web service call to Producer Express.

With this enhancement, the “creator” of an onboarding request need not have a Producer Express user account; the web service call will accept anyone’s name as the creator. The non-user’s name will persist with the request, including being displayed in the Recruiter column of the home office and distributor workspaces.

A request initiated by a non-user creator cannot be routed back to a recruiter for review and/or signature. Otherwise, the onboarding workflow can proceed along any routing path that Producer Express currently supports, as if it were initiated manually.

Each onboarding web service request requires the following data:

- Packet type, producer name, producer email address, and any other fields currently required to send an onboarding e-vite
- The request “creator”
- Other fields configured as required by your company

Additional interview questions can be configured to be included in the web service request as optional fields. [MKT-9658]

*Note: To take advantage of this enhancement, please contact your Vertafore sales representative.*

### **Data Reconciliation Services**

- **Virginia License Expiration Dates:** Some states, such as Virginia, issue a “perpetual” license – a license for which the state does not set a fixed renewal date. However, a perpetual license can lapse or expire if a producer does not complete his or her continuing education or meet other state requirements.

Perpetual state license information obtained from the national Producer Database (PDB) does not include an expiration date. To help users track when a perpetual license would become inactive if a producer does not meet state requirements, Producer Manager can automatically calculate a license expiration date and add it to the producer’s record.

Now, when Producer Manager performs automated data reconciliation of a producer’s record against updated state data, a sync normalizer can set the expiration date of a Virginia non-resident perpetual license to December 31 of every even-numbered year following the first anniversary of the license original issue date, to coincide with the due date of the Virginia continuance fee. [MKT-9790]

*Note: To take advantage of calculating license expiration dates for licenses with no expiration date on the PDB, please contact your Vertafore representative.*

### **Education & Training**

- **Third-Party Certifications Start Date:** For more accurate education credential timeline calculations, third-party certification information on a producer’s record in Producer Manager now includes a certification start date. For a certification obtained through integration with Compliance Certification Clearinghouse, LLC (ClearCert), the value of the new Start Date field is calculated based on the Original Issue Date of the supporting license in a certification state. Therefore, this date must be populated on the state license in the Licenses/Qualifications data section of the producer’s record.

You also may record a Start Date when manually adding a third-party certification to a producer’s record using the Maintain Third Party Certifications page. The Verified Date field has been removed. [MKT-9464]

*Notes: Permission to view the Third Party Certifications data section must be enabled in the security role to which your user account is assigned. To obtain ClearCert third-party certifications in Producer Manager automatically, your company must subscribe to ClearCert services and also to the Vertafore third-party certification integration service. For more information, consult your Vertafore representative.*

- **Updated Texas Annuity Education Credential Program:** To be eligible to sell annuity products, certain states require producers to take special annuity education coursework. Producer Manager has pre-defined annuity education credential program templates to make it easier to configure credential programs that track producers' compliance with states' annuity education requirements.

To support different sets of annuity education rules that reflect conditions before and after Texas regulation changes in 2011, the Credential Programs page now offers the following, new Texas annuity credential program templates:

- Texas Annuity Program (Before 9/1/2011): An individual producer will obtain the Texas annuity credential if he or she:
  - Holds an active resident or non-resident Texas license with a Life or Life, Accident, Health & HMO qualification
  - Has taken four hours of coursework within the "Annuity Training - Initial" course category with a regulatory body of Texas
  - If a resident, has taken four hours of coursework within the "Annuity Training - Ongoing" course category with a regulatory body of Texas once every one-year license period

*Note: Coverage will end on 9/1/2012, due to the change in Texas requirements.*

- Texas Annuity Program (Starting 9/1/2011): An individual producer will obtain the Texas annuity credential if he or she:
  - Holds an active resident or non-resident Texas license with a Life or Life, Accident, Health & HMO qualification
  - Has taken four hours of coursework within the "Annuity Training - Initial" course category with a regulatory body of any state that has adopted the NAIC Model Act for Annuity Suitability
  - If a resident, has taken eight hours of coursework within the "Annuity Training - Ongoing" course category with a regulatory body of Texas once every two-year license period.

*Note: Using this template will prompt the user to add "Annuity Product Specific Training" as an additional requirement.*

[MKT-9771]

### **Producer Data Management**

- **Prepopulate Producer Data in Producer Express Requests:** When you click the Create New Request button on a producer's record in Producer Manager to initiate a Producer Express request for that producer, now the system is capable of copying demographic data from numerous fields in the record to the new request, saving manual data entry. Among the data that can be copied are the following:
  - Addresses and email address

- Phone Numbers (for firms, phone number comes from the Business address type)
- NPN
- Resident States [MKT-8119]

*Note: To take advantage of this enhancement, please contact your Vertafore sales representative.*

### **Producer Onboarding**

- **Agreement Upline:** The workflow step to add an agreement hierarchy upline to a Producer Express request now offers the following configuration options:
  - The name of an upline producer can be removed from the Search for Parent Producer page
  - Certain agreement types can be made non-selectable on the Select Upline Agreement page [MKT-9715]

*Note: To take advantage of this enhancement, please contact your Vertafore sales representative.*

- **Form Population from Selected Agreement Upline:** Now a producer's agreement upline information can be configured to pre-populate custom forms available for feeding to a downstream system at the end of a Producer Express workflow. [MKT-9713]

*Note: To take advantage of this enhancement, please contact your Vertafore sales representative.*

### **Miscellaneous**

- **Producer Manager Adopts Vertafore Colors:** The color scheme of Producer Manager has been updated to match the Vertafore corporate color scheme. Also, the former Sircon logo has been replaced with the Vertafore logo. [MKT-9773]
- **Updated Navigation and Search:** The navigation menu in Producer Manager is updated for browser compatibility, and the Producer Quick Search now is integrated into the top navigation bar. [MKT-9707]

### **Bug Fixes**

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

- Certain requests in Producer Express were stuck in Pending status when a PDB report requested during a workflow could not be retrieved and processed. [MKT-8287]
- A Producer Express onboarding request started by a recruiter and reassigned to a recruiter admin (administrative assistant) was incorrectly being routed back to the recruiter admin after the producer completed the interview questions. The request now routes correctly to the recruiter for electronic signature. [MKT-9196]