



# PLM Producer Manager and Producer Express 6.5 Release Notes September 21, 2013

Vertafore is pleased to release PLM Producer Manager and Producer Express v.6.5.

With each release, we are incrementally improving and updating PLM Producer Express and Producer Manager to provide you with the best possible experience.

## Training

Prior to this release of PLM Producer Manager and Producer Express, Vertafore presented a training webinar on the highlights of this release. To view a recording of the webinar, visit [www.vertafore.com/plmtrainingondemand](http://www.vertafore.com/plmtrainingondemand). Contact your Vertafore customer support representative for the password.

If you or your staff would like custom training on Producer Manger, Producer Express, or any Vertafore application, please ask your Vertafore sales representative about our training services.

## Major Enhancements

The following table summarizes the most important enhancements in this release:

Enhancement	Description
<b>ECS/Producer Express Integration</b>	<p>Producer Express now helps life and annuities carriers reduce quote-to-issuance cycle times by connecting directly to BGAs that use PLM Efficient Contracting Solution (ECS). It improves the carrier's "ease of doing business" by automating contracting status responses back to the BGA, eliminating the need for manual follow-ups by phone or email.</p> <p>In addition to becoming better partners with their distributors, carriers using Producer Express also can reduce their own manual efforts toward producer onboarding. Instead of rekeying requests that are currently received via email or fax, ECS automatically will create a new onboarding request in Producer Express. The request includes all BGA-submitted producer data and contracting forms.</p>

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Producer onboarding requests that flow through ECS connections can harness the full power of PLM automation, including synchronizing producer data with state data on the national Producer Database (PDB), performing producer sales authorizations, and feeding contracting data and form document images to other carriers systems via web services.

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

## Questions

If you encounter any problems or have questions concerning this release, contact Vertafore Customer Support by using one of the following methods:

- Call us at (877) 876-4430
- Email us at [plmsupport@vertafore.com](mailto:plmsupport@vertafore.com)
- Login to the self-service portal at [www.sircon.com/support/self-service.html](http://www.sircon.com/support/self-service.html)

## Enhancements

The following tables list details of enhancements in this release, grouped by type:

### ECS/PX Integration

Feature	Description
<b>Send Producer Contracting Data from ECS to Producer Express</b>	When an agent completes an onboarding request with a BGA in ECS, the entire bundle – including contracting data and signed contracting forms – now can be uploaded automatically into Producer Express as a new carrier onboarding request. [MKT-10361]
<b>Send Updated Onboarding Request Status from Producer Express to ECS</b>	A BGA can view in ECS the status of an ECS-initiated onboarding request in Producer Express. [MKT-10416]

## Other Enhancements

Feature	Description
<b>Address Change Request</b>	<p>Now you can submit an address change request through Producer Manager for an individual producer to any and all regulatory jurisdictions in which the producer is licensed and that offer the service.</p> <p>Use the Address Change Request page (Express Services menu&gt;Service Requests&gt;Address Change Request Individual) to submit national address change requests.</p> <p>Also, you may follow up on the status of a request using the Address Change Status Inquiry (Express Services menu&gt;Inquiries&gt;Address Change Status Inquiry).</p> <p>For more information, please see the Compliance Express 15.5 Release Notes. [MKT-10163]</p>
<b>ClearCert Error Handling</b>	<p>When Producer Manager requests a producer's training certifications from ClearCert, if ClearCert cannot find the requested producer or any initial training course completions for the requested producer, Producer Manager formerly was displaying the following, misleading error message: "Last name does not match the producer record."</p> <p>Now, Producer Manager displays the following message: "No record of initial training completion was found."</p> <p>In addition, a new Vertafore-configurable business rule can be set to ignore this error in a ClearCert response, so that it does not appear in the Processing Messages to Review section of the Data Reconciliation Details page. [MKT-10536]</p> <p>Note: To take advantage of this enhancement, please contact your Vertafore sales representative.</p>
<b>ClearCert Validation</b>	<p>When Producer Manager requests training</p>

Feature	Description
	<p>certifications from ClearCert, it uses a producer's National Producer Number (NPN) to identify the producer. Once it finds a match on NPN, Producer Manager validates that the producer's last name in Producer Manager matches the last name obtained from ClearCert. If no match, an error is displayed. However, errors can occur due to insignificant mismatches, such as an apostrophe or a space in the name.</p> <p>When processing ClearCert responses, Producer Manager now matches only on the first two characters of a producer's last name, stripping out special characters.</p> <p>[MKT-10535]</p>
<b>PDB Reports</b>	<p>The Adjuster Designated Home States indicator now is displayed on PDB Reports available in both Producer Manager and Producer Express.</p> <p>[MKT-10182]</p>
<b>Upload Roster</b>	<p>In Producer Express, the Upload Roster page now is configurable to allow special on-screen instructional text per request type.</p> <p>Previously the instructional text needed to be identical for every request type.</p> <p>[MKT-9641]</p> <p>Note: To take advantage of this enhancement, please contact your Vertafore sales representative.</p>
<b>Help Desk Workspace</b>	<p>Now Producer Express can be Vertafore-configured so that the Workspace page of a user in the Help Desk role displays no requests after login. The user then can use the Filter Options to view a desired set of requests.</p> <p>Previously, the Workspace page was loading all requests, which sometimes caused prolonged page-loading time.</p> <p>[MKT-10673]</p>

Feature	Description
<b>Education Credential Program</b>	The NAIC Model Act Annuity Training template-based credential program has been added to Producer Manager to support Minnesota. [MKT-10478]
<b>Online Help</b>	Microsoft Excel spreadsheets now download from the Producer Manager Online Help, instead of attempting to open inside the help frameset. [MKT-10584]

## Bug Fixes

The following is a log of bugs that have been fixed since the last PLM release:

Bug	Resolution
<b>Bulk Business Updates</b>	A bulk business updates file uploaded to Producer Express was falsely reported as missing when a user navigated back to the Upload Producer CSV page from a preceding page. [MKT-10184]
<b>Review/Update Company</b>	In Producer Manager, the ability to maintain external system IDs for a company was unavailable. [MKT-10682]
<b>Firm Associated Individual Appointments Inquiry</b>	In Producer Manager, the Firm Associated Individual Appointments Inquiry was not working in the list report view. The spreadsheet view was working correctly. [MKT-10485]
<b>Producer Express Bulk Address Updates</b>	Producer Express was setting the status as “Processed” of Bulk Address Update requests that included 9-digit ZIP codes, when in fact the address information of affected producer records in Producer Manager was not being updated. Additional bugs in sending bulk address changes from Producer Express to Producer Manager for Business, Mailing, Residential, or Billing address types also are

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Bug	Resolution
	fixed. [MKT-10744, MKT-10871]