



**Vertafore™**

Unleash your potential

# Producer Manager™



**You have to meet regulatory requirements, that much is clear.** What may not be as obvious is what you need to do to keep your producers authorized to sell.

## Producer Manager will enforce:

- Valid license, qualification, appointment, and termination reason types by jurisdiction
- Appointment backdating rules
- Licenses, qualifications, and appointments effective date rules
- Appointing authority requirements
- Compensation hierarchy, with templates and validation
- Unique state regulations

## The system will not allow you to:

- Appoint producers in a state where they are not licensed and qualified
- Appoint in a state where statutory companies are not authorized or where lines are not authorized
- Inadvertently terminate “shared” producers across multiple business units

## Are Your Agents Authorized?

Keeping agents authorized to sell involves not only meeting regulatory requirements, but also knowing the correct combination of license, appointment, education, and contract that an agent needs. To add to the challenge, you must make these determinations on a case-by-case basis because the requirements are different in every state and continually changing.

Vertafore’s producer lifecycle management platform includes a dynamic service that does more than store your records and tell you what the requirements are in each state. Producer Manager connects you with information sources that will tell you when the requirements change — giving you easy access to the information you need to determine what combination of license, appointment and education your producers need.

## More than a Simple Tool

Producer Manager helps you reduce labor costs and increase regulatory accuracy by using trusted data sources and product-driven rules to automate your routine sales authorization practices. The service links you to all industry stakeholders electronically to

help you manage accurate data and producer relationships, meet regulatory requirements, and process transactions electronically.

## Automatic Data Accuracy

Producer Manager makes managing producer relationships and credentials easier by enabling you to synchronize entire producer records with data from the National Producer Database (PDB). This ensures that you are working with the the same data that state regulators have on file.

Using the most accurate data available, Producer Manager streamlines and automates processes using a sophisticated rules engine based on your business rules, and the most up-to-date requirements in all 50 states.

## Making Connections

Our unique connections to state and national databases provide a powerful and easily administered e-licensing and appointment service that you can use to perform online transactions and inquiries.

When you process transactions electronically—using the most accurate data available—you can reduce the time and effort it takes to manage sales authorization from weeks to hours or even minutes.

Direct links to the PDB, state databases, and continuing education providers will enable you to understand what requirements you have to meet, process the appropriate transactions electronically, and communicate changes to regulators.

#### **Producer Manager enables you to:**

- Add a new producer or update a producer already in the system with data pulled straight from the PDB
- Reconcile batches of records with state data or PDB data on a regular or on-demand basis
- Appoint, renew, or terminate producers electronically
- Automatically update your producer's records to reflect compliance with continuing education requirements

#### **Powerful Reporting**

The system's report tools can help you save money on appointments by storing, tracking and organizing your data into reports that give you exactly the information you need—enabling you to spend the money appointing and renewing only those agents who need it.

Producer Manager can generate reports of your producer data in a variety of formats to help you easily distribute and analyze producer data.

#### **Additional reporting capabilities include:**

- New producers
- Individual or firm summary

**To learn more about how Vertafore Producer Manager can help you reduce the costs and risks associated with compliance, contact us at 877.876.4450.**

- Licenses
- Appointments
- License applications
- License renewals due
- Individual-to-firm associations
- Continuing education (CE) reviews due
- Background investigations
- Business unit producers
- Required items
- Staff member (users) list
- Basic and advanced staff member productivity

#### **Exceptional Performance and Security**

Producer Manager is a web-based application hosted and managed by Vertafore data centers. It's backed by an enterprise-class hardware and software infrastructure, and top of-the-line application servers, database servers and reporting server software. Vertafore also provides advanced network security, Internet bandwidth, and dedicated production support staff to monitor and manage performance and security.

#### **A Sound Investment**

Producer Manager can help you turn the cost of compliance into a sound investment. The service helps you avoid fines for non-compliances, and saves you money on appointment fees by helping you:

#### **Track and store the most up-to-date data in one central location**

The system manages producer data in one place, and offers a "one-click compliance" technology to synchronize your data with data that the PDB has on file for your producers.

#### **Standardize, automate and process electronically**

We help you establish standard processes for compliance activities, and automate data, and implement electronic processing to ensure compliance and speed authorization management.

**For more information about Producer Manager, please contact us at 877.876.4450 or visit our website at [vertafore.com/sircon](http://vertafore.com/sircon).**

Vertafore is the leading provider of software and information to the insurance distribution channel, including independent agents, brokers, MGAs, carriers and reinsurers. Vertafore leverages a unique industry presence to deliver meaningful solutions—powerful technology, critical information and robust insights to help organizations effectively respond to business challenges and capture new opportunities. Vertafore solutions are helping more than 17,000 customers and 500,000 end users gain a competitive advantage to accelerate their business performance.

