

A VUE Distribution Management Suite Module

VUE Onboarding & Compliance

VUE Onboarding & Compliance easily modernizes producer administration for Life & Annuity, P&C, and Health insurers. Our once-and-done workflow automates the entire producer management process, including licensing, contracting, appointing, and compliance. Digital processing provides real-time onboarding of new producers, while ensuring regulatory compliance with self-service automation of appointments, renewals, and terminations.

VUE Onboarding & Compliance integrates directly with VUE Distribution Compensation and VUE CRM for Insurance solutions.



What our clients are saying about VUE...

I want to thank each member of the VUE Software team for their exceptional effort. We knew we were pushing the envelope to implement this solution so quickly. Each team member went above and beyond expectations to make this happen. Thank you for your continued excellence and dedication to making sure Molina Healthcare is able to keep our commitments to our brokers."



MODERNIZE ONBOARDING AND CREDENTIALING

Streamline your appointing and contracting processes with real-time, easy to configure onboarding workflow that integrates third party processes for background and credit checks (i.e. NIPR, AML, FCRA), and license information into VUE's modern distribution platform. Intuitive workflow simplifies onboarding and creates a great first impression. E-forms streamline onboarding, simplifying your job. Custom workflows suspend the appointment process until all requirements are met, enabling Just-in-Time appointing that saves time and eliminates unnecessary costs.

ONE-CLICK ACCESS TO THE NATIONAL INSURANCE PRODUCER REGISTRY

VUE Software optimizes producer management with real-time integration to NIPR's Producer Database (PDB) giving insurers timely and accurate access to new producer demographics, licenses, and appointment management. VUE Software provides clients an automated process for additional appointments, license renewals, and reconciliation to the PDB. VUE's automated, straight-thru processes allow for terminations and appointments that are fully compliant with all state licensing and appointment rules.

SELF-SERVICE PORTAL REVOLUTIONIZES PRODUCER-CARRIER RELATIONSHIPS

VUE's Self-Service Portal provides 24/7/365 availability for producers, enabling "anywhere, anytime, and any device" access to your information, allowing you to focus on value-added sales activities rather than tedious administrative tasks. With VUE, Insurers can deliver information to producers regarding their production, client information, compensation, and other vital information that improves operations flow and enhances relationships between the Insurers and Producers. And best of all, VUE Onboarding & Compliance integrates seamlessly with our Producer Self-Service Portal.





PRODUCER LICENSING

- One-click synchronization to the NIPR and PDB with VUE PDB Recon
- Online Universal Application Resident license (RL)
- Non-resident license (NRL)
- RL/NRL renewal process (individual and bulk)
- Fee tracking

PRODUCER CONTRACTING

- Electronic submission of data
- Collect relevant business information
- Obtain disclosures
- Background checks
- Pull and verify license information automatically

- Track product training certifications
- Upload supporting documentation
- Automated checklist for requirements
- Finalize producer contracts
- E-signature support

PRODUCER COMPLIANCE

Appointing

- Background checks
- Straight-thru appointment processing
- Workflow appointment requirement verification and escalation processes
- Just-in-Time (JIT) appointments
- Configurable automatic notifications
- State rules updated weekly

Compliance Processes

- Processes for license renewal, reconciliation of appointments, and termination of low producing agency appointments
- Terminate appointments before renewals are billed
- Automatic alerts

Eligibility

- Complete checklist to approve producer activation
- Separate rules for selling and paying commissions
- Eligibility web service for administration systems
- Eligibility reporting

Requires Producer Self-Service Portal*

"Give your producers 24/7 capabilities to maintain their compliance information"

Self Service Producer Management*

- Configurable dashboards
- Add/change producer profiles
- Add/change office locations
- Onboard producers and contacts
- Add/terminate contracts

Self Service Compliance*

- Eligibility reporting
- Add appointments and terminate appointments
- Upload compliance documentation
- View licenses and appointments

VUE Components

Producer Database

- Producer profiles with demographics
- License and appointment eligibility checking
- User defined fields and entities

Integrations

- Supports all major background check vendors
- Out of the box integration with NIPR
- Mass update capability
- Education tracking with leading training vendors
- Easy integration with existing systems using VUE Integration Manager

Tools to automate the work

- Graphical workflow and questionnaire designer
- Form designer with branching
- Letter and email generation
- Report writer

Hierarchy Management

- Reporting and commissionable hierarchies
- Tools to replace, promote, and merge producers within hierarchies

Tools to simplify the work

- Work queue metrics and dashboards
- Personalized queries and results
- Audit trail down to the field and user level
- Upload document
- Exception tracking and escalation
- Add notes at producer or credential level

Communicate and approve with ease

- Follow-up and submit requests for approval
- Email links or documents one at a time or in bulk
- Automatic tasks and emails based on parameters you set

ABOUT VUE SOFTWARE

VUE Software is an innovative provider of performance-driven solutions built exclusively for the insurance industry since 1991 in Life & Annuities, Health and P&C Insurance. VUE Software is one of the most experienced and established Insurance Distribution Technology providers in the business today. VUE Software is leading the Distribution Modernization movement, bringing clients a solid path to revenue growth and competitive advantage. For more information about VUE Software, please visit www.vuesoftware.com.

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