



A Vue Distributor Accelerator Suite Module

Vue Contracting & Compliance

Vue Contracting & Compliance is designed for large distributors (MGA, FMO, IMO, and Brokers) who work with multiple insurers, to modernize their administration and grow their business. Our once-and-done workflow automates the entire producer management process, incorporating licensing, contracting, and compliance. Digital processing provides real-time onboarding of new producers while ensuring regulatory compliance through self-service automation of appointments, renewals, terminations, and even ongoing product training certification.

Vue Contracting & Compliance integrates directly with Vue Compensation and Vue CRM for Insurance Distributors.

Modernize contracting and credentialing

Streamline your contracting with real-time workflows that integrate third-party information for background checks, credit reporting, and license information into Vue's modern distribution platform. Workflow-driven contracting is easy and makes a great first impression.

Pre-populated, contextual forms reduce effort and capture only what is needed from producers to optimize and enhance the onboarding experience.

Expand your reach

Electronic submission and contracting processes provide distributors with the ability to quickly and easily contract new producers, as well as increase the number of insurers. Vue's workflow enables distributors to more efficiently create a one (producer) to many (carrier) contracting model.

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, producers enjoy a flexible, paperless connection from contracting to electronically requesting appointment to changing workflows.

Administer producer relationships with ease using automated license-expiration notices and workflow processes that are fully automated with the NIPR, all while integrating seamlessly with our producer self-service portal.

One-click access to the national insurance producer registry

Vue integrates in real-time with the NIPR (National Insurance Producer Registry) and producer database (PDB) allowing distributors to upload new producer demographics, licenses, appointments, and RIRS (Regulatory Information Retrieval System) actions. With Vue, clients can generate up-to-date licenses and appointments in real-time through Vue PDB RECON, delivering one-click access to the PDB. Vue clients can easily and regularly update their producers' licenses and appointments to maintain compliance.



Features

Producer contracting

- Electronic submission of data collect relevant business information obtain disclosures Pull and verify license information automatically upload supporting documentation
- Automated checklist for requirements
- Finalize multiple producer/carrier contracts E-signature support
- Contracting data repository to support subsequent additional contracting
- Track producer training certifications and other carrier requirements

Producer licensing

- Online universal application resident license (RL)
- Non-resident license (NRL)
- RL/NRL renewal process (individual and bulk)
- Fee tracking

What our clients are saying about Vue

"Vue offers a well-rounded, flexible system that will save us time, reduce risk, and increase efficiency. I really enjoy the relationship I have with the Vue team, from sales to delivery. Everyone has a great attitude and is fun to work with."



Producer compliance

Appointment requests and tracking

- One-click license synchronization to the PDB with Vue PDB recon
- Multiple methods of appointments requests including email, file, submission of paper forms
- Appointment tracking status from request to carrier confirmation
- NIPR confirmation and reconciliation of appointments

Eligibility

- Complete checklist to approve producer activation
- Ready to sell tracking
- 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
- Upload compliance documentation
- View licenses and appointments

Vue Components

Producer database

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

Hierarchy management

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

Tools to automate the work

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

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

Communicate and approve with ease

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

Tools to simplify the work

- Work que 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