

How to Use the PERS System Functions in My Vertafore

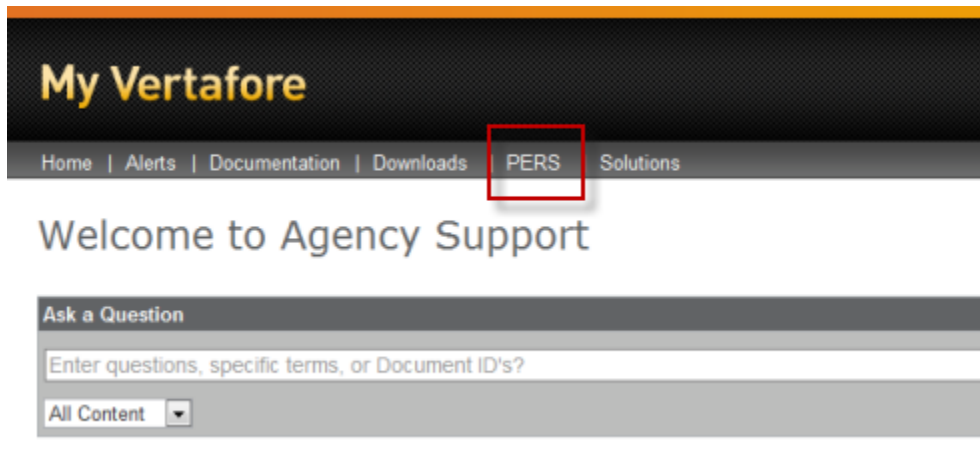
What is PERS?

PERS or Product Enhancement Request System - the tool by which the user community can partner with NetVU and Vertafore to document product enhancement requests and socialize these requests to the entire user group. These requests are reviewed by a select committee of NetVU peers, and Vertafore Product Management to improve the products you use every day.

Description

This document provides information about the functions that allow you to create, search, vote, submit changes and recommendations, receive update notifications, and access your recommendations in the Product Enhancement Request System (PERS) located in My Vertafore.

1. The following steps explain how to create PERS in My Vertafore:
 - a) Log on to My Vertafore (support.vertafore.com). The Welcome to Agency Support page appears.



- b) On the Welcome to Agency Support page, click the **PERS** tab. The PERS home page appears.

Welcome to PERS

Browse PERS content

Ask a Question

Enter questions, specific terms, or Document ID's?

Search

All Content

ID	Title
PER84	test pers one
PER2	Claims download
PER1	Claims download
PER80	"When adding a new account in BenefitPoint the system prompts "Does account already exist in AMS 360?" and provides 3 options: Yes No Don't Know. When selecting "Don't Know" the system queries AMS to determine if the account exists. However if the client already exists in both BenefitPoint and AMS the search feature does not return the client as a match. This leads to potential duplication of clients in both systems."
PER79	Would like to associate plans from BP with customers in AMS360 in a different division but still maintain all financial data for those plans in a separate division.
PER83	Carrier statements - add a column so can see both the pol# and alt id came may be sending or adding a check box option that allows to see one or the other.
PER70	No cash flow statement in AMS 360
PER78	Benefit point Account summary and Plan Info screens do not mirror Sagitta Basic Client and Basic Policy screens. There are fields in Sagitta and we would like to make required but can't because there is no place to put info in Benefit Point. This will cause errors and users will have to manually input in Sagitta - double entry
PER81	On the Producer Commission Detail Report we would like to have an output option for Statement Office.
PER72	Cannot change the type of business once a line of business has been added to the system.

ID	Title
PER2	Claims download
PER80	"When adding a new account in BenefitPoint the system prompts "Does account already exist in AMS 360?" and provides 3 options: Yes No Don't Know. When selecting "Don't Know" the system queries AMS to determine if the account exists. However if the client already exists in both BenefitPoint and AMS the search feature does not return the client as a match. This leads to potential duplication of clients in both systems."
PER1	Claims download
PER84	test pers one
PER78	Benefit point Account summary and Plan Info screens do not mirror Sagitta Basic Client and Basic Policy screens. There are fields in Sagitta and we would like to make required but can't because there is no place to put info in Benefit Point. This will cause errors and users will have to manually input in Sagitta - double entry
PER74	The ability to confirm insureds data when reporting claim to agency while they are on the phone. We are in the data sections of 360 (rather than the ACCORD Form) and it would be nice to confirm: Phone Numbers Emails Drivers License numbers Dates of Birth Loss Payees etc. I hate gathering info then go to the eForm and data needs to be updated or corrected after we have already hung up with insured and we have to call back.
PER57	WHEREVER the BenefitPoint integration allows inclusion of the Broker of Record Date to the New BOR date on Policies in Sagitta we need to have a Firm Choice for Benefitpoint - Sagitta Firms
PER77	When a prospect is created in BenefitPoint and it integrates to Sagitta the Source Date is populated with the date the prospect was created. We need the source date to be updated when the prospect is changed to a client in BenefitPoint.
PER79	Would like to associate plans from BP with customers in AMS360 in a different division but still maintain all financial data for those plans in a separate division.
PER59	There are no payroll functions in AMS 360. All journal entries for deductions and taxes have to be calculated and entered manually.

Welcome
Vertafore Agency

- My Subscriptions
- My Recommendations

Additional Assistance

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- Vertafore University
- User Group
- My Vertafore

2. Use one of the following methods to search for a PERS item:

- Search for PERS items from the My Vertafore home page
 - In the **Ask a Question box**, enter the information you want to find.
 - Press the **Search** button.
 - When you select an item to view from the search results the PERS page automatically opens if the item is a PERS entry.
- In the Ask a question section on the Welcome to PERS page, enter the information about the PERS item for which you are searching, and then click the **Search** button. You will receive search results in which you can filter by product or other key terms. These filters are located under filters on the left side of the Find Answers window to find the PERS item for which you are searching.

3. To enter a new PERS item, follow these steps:

- Use one of the methods in step 2 of this document to make sure that there is not an existing PERS item that is the same as the one that you want to create. In other words, please search first for your PERS idea.
- If the PERS item does not exist. On the Find Answers page, click the **Enter PERS** link.

Find Answers

Enter PERS

Filters

Libraries

PERS

Ask a Question

test pers search

- c) In the Title section of the Create new PERS Request page, enter a descriptive title for the PERS that you are creating.
- d) In the Business Justification section, enter the business need that the PERS item solves, the Vertafore Product it is associated with, and what the solution is for your business problem. Be sure to include any workflow steps, and then click the **Submit** button.



4. Use one of the following methods to vote on an existing PERS item:
 - a) Click the **Vote On PERS** link that is on the **PERS Detail** page.

[Back](#)
[★ Vote On PERS](#)
[Add My recommendation to this PERS](#)

- b) Scroll to the bottom of the screen, and then click one of the five options to select the one that best represents the PERS impact to your business.

Please vote on this enhancement request

- ☐ 1. This change would cause extreme difficulties in my agency day to day operations
- ☐ 2. I do not agree
- ☐ 3. Nice for Agency day to day operations
- ☐ 4. Important to Agency operations
- ☐ 5. Critical to Agency operations

Rate Content

5. If you found a PERS item during the search that you performed in step 3 of this document to which you want to suggest changes or additional information, you have the option to add this information. To suggest a change or additional information to an existing PERS item, follow these steps:

- a) On the PERS Detail page, click the **Add My recommendation to this PERS** link. The Content Change Recommendation for PERXX page appears.

Note The PERS number is based on the PER item to which you are making changes.

[← Back](#) [★ Vote On PERS](#) [Add My recommendation to this PERS](#)

- b) On the Content Change Recommendation for PERXX page, enter your suggestions to the existing PERS item for review by the R&D Committee in the Business Justification section, and then click the **Submit** button.

Home > PERS > Content Recommendation

Content Change Recommendation for PER82

[← Back to Details](#)

Recommendation

(* required field)

Title*

RE: Policies go for 12 months + 1 day. so the eff date is 1/1 and the EXP date is 1/1. Application of commission must be prevented from being applied to the Month of the last day of the policy if it is the

Business Justification

(Please include product version and why this is important. Include exact steps in your workflow) *

B I U ul x x' []

Submit

Cancel

6. The PERS system has a unique feature that sends you an email when a new PERS item has been published or when an existing PERS item has been updated. However, you must subscribe to this functionality. To receive an email notification when PERS items are published or updated, follow these steps:

- a) On the Welcome to PERS page, click the **Browse PERS content** link. The PERS page appears.

Welcome to PERS


[Browse PERS content](#)

[Ask a Question](#)

- b) On the PERS page, double-click the **Products** folder in the Available Categories section. A list of products appears.

Home > PERS

PERS

 Your subscription to PERS will expire in **2 days** (Renew). To cancel this subscription, click (

 Enter PERS

Available Categories

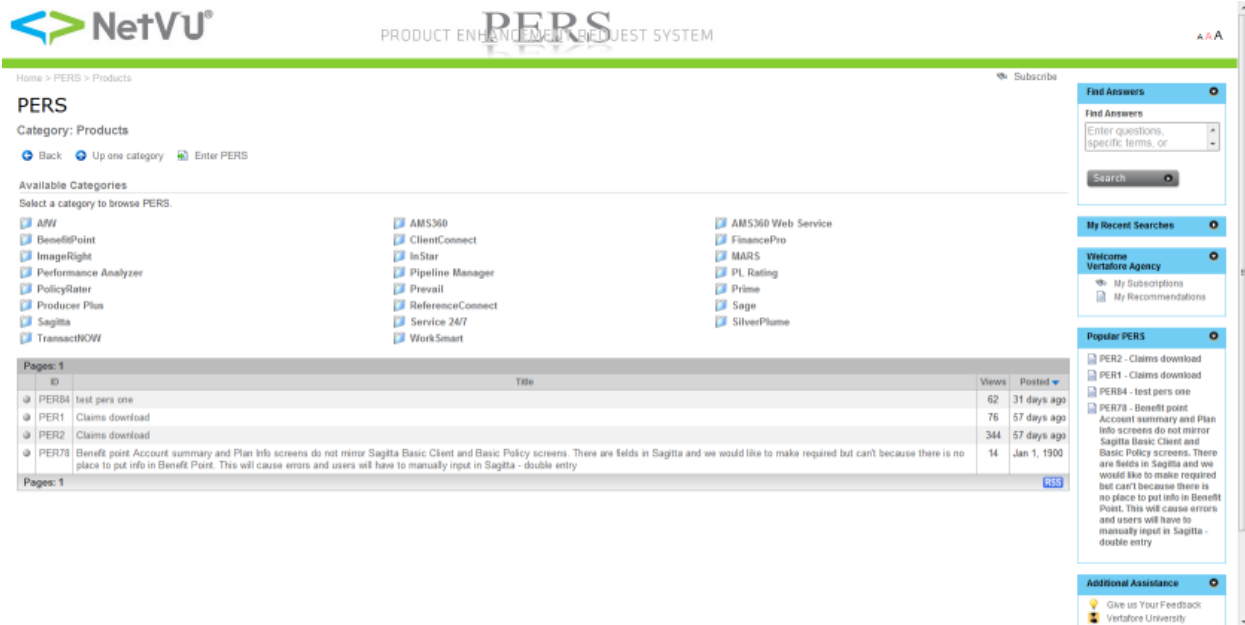
Select a category to browse PERS.

 Area

 **Products**

 Document Type

- c) Double-click the product from which you want to receive PERS alerts under the Available Categories section of the PERS page.



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Home > PERS > Products

PERS
Category: Products

Back Up one category Enter PERS

Available Categories
Select a category to browse PERS.

APW BenefitPoint ImageRight Performance Analyzer PolicyRater Producer Plus Sagitta TransactNOW	AMS360 ClientConnect InStar Pipeline Manager Preval ReferenceConnect Service 24/7 WorkSmart	AMS360 Web Service FinancePro MARS PL Rating Prime Sage SilverPlume
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ID	Title	Views	Posted
PER84	test pers one	62	31 days ago
PER1	Claims download	76	57 days ago
PER2	Claims download	344	57 days ago
PER78	Benefit point Account summary and Plan Info screens do not mirror Sagitta Basic Client and Basic Policy screens. There are fields in Sagitta and we would like to make required but can't because there is no place to put info in Benefit Point. This will cause errors and users will have to manually input in Sagitta - double entry	14	Jan 1, 1900

Pages: 1

PER2 - Claims download
PER1 - Claims download
PER84 - test pers one
PER78 - Benefit point Account summary and Plan Info screens do not mirror Sagitta Basic Client and Basic Policy screens. There are fields in Sagitta and we would like to make required but can't because there is no place to put info in Benefit Point. This will cause errors and users will have to manually input in Sagitta - double entry

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d) In the upper-right side of the page, click the **Subscribe** link to subscribe to the product.



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PRODUCT ENHANCEMENT REQUEST SYSTEM

Home > PERS > BenefitPoint

PERS
Category: BenefitPoint

Back Up one category Enter PERS

Subscribe

Find Answers
Find Answers
Enter questions, specific terms, or
Search

My Recent Searches

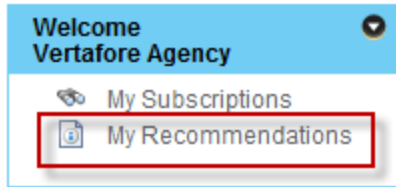
Welcome Vertafore Agency
My Subscriptions
My Recommendations

Additional Assistance
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My Vertafore

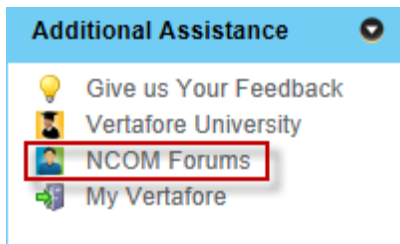
NetVU - Network of Vertafore Users | 800.456.7799 | www.netvu.org | info@netvu.org

- On the right side of the screen under the **Welcome** box, the **My Recommendations** link contains a list of PERS recommendations and changes to existing PERS that you have submitted. This page allows you to track the progress of your recommendations.

You can receive feedback on the disposition of your requests. To access your recommendations, click the **My Recommendations** link under the **Welcome** box on the right side of the page.



8. To access NCOM (NetVU Community), click the NCOM Forums link on the **Additional Assistance** menu on the right side of your screen.



9. To navigate back to My Vertafore, click the **My Vertafore** link on the **Additional Assistance** menu on the right side of your screen.

