

# SmartOffice 2009 BGA Webinar Series

## Pre BGA Client Partner Conference Wish List Review

*Welcome!*

*This Webinar will  
be approximately 30 minutes in length.*

# Agenda

AGENDA		
August 27, 2009	Topic	Approx. Time
	<b>Pre BGA Client Partner Conference Wish List Review</b>  Sherri Isaacson Product Manager E-Z Data	25 minutes
	<b>Comments / Questions</b>	5 minutes

# Review of Enhancement Requests

Sherri Isaacson  
Product Manager  
E-Z Data

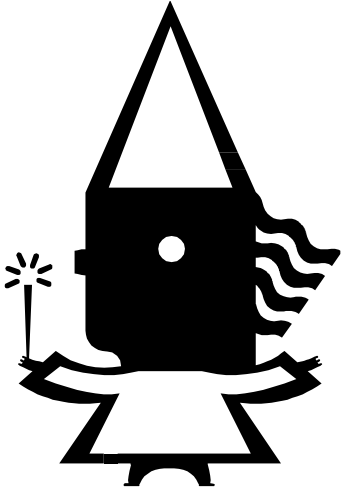
# Priority

- Essential
- High Impact
- Valuable
- Interesting
- Low Impact
- Not Applicable

# Office Feedback

- > Do your homework
- > Come prepared to vote!

# The Requests



# General

- > I want SmartOffice to READ MY MIND AND DO MY WORK FOR ME!
- > UNDO Button

# General

- > Ability to open multiple browser windows of SmartOffice at the same time
- > Have the ability to assign security on certain fields
- > In the last version of SO you could type in the first letter of the word you wanted and it would pre-fill the word. Once the current version was introduced that ability was removed

# General

- > Bring back Auto-refresh! For example, when something in HO Status is Processed have the system auto-refresh the screen instead of having to click the Refresh button
- > SmartOffice times out too quickly and causes our computers to freeze up
- > Tabbing through data entry screens – too many clicks for tabbing through non-important fields (such as the customize choice buttons)

# General

- > Improve Correspondence Load Time!
- > Run Correspondence in the background so it does not hold up moving to another screen.

# Activity/Calendar

- > The ability to copy an existing activity using a button similar to 'copy an existing user'
- > Create a functionality that would allow follow-up appointments, etc to be made with specific agents, etc

# Correspondence

- > Intellisys Bar code that generates for the 2nd insured for LTC and Survivorship application
- > More functionality with who status correspondence goes to - for instance, if we want to send manually generated status to one person but have the weekly status go to another, we would like that option.

# Correspondence

- > When sending out an email we would like to be able to attach it to the agent's "Request / Requirements" (for example: attach an email sent to Banner for an agent's appointment request. Right now we can attach to an agent, contact or case, but not to the agent's specific request from the "Request / Requirements" tab
- > Option to Re-send Letters that are in the agent or case smart pad notes.

# Correspondence

- > Be able to attach a document AFTER you have edited the letter so in case you forget you don't have to cancel and start all over, and once we have closed out of the letter be able to go back in to the letter to add something we may have forgotten instead of canceling and starting all over.
- > Make Letter selection and method of sending easier (email vs print)
- > Default the available letters by Status of the case

# Email

- > When using the reply and forward e-mail features from the Smart Pad. The stamp that includes who the original e-mail was sent to, the subject line, and the date & time sent is *not placed into the new message*. The lack of this information results in our staff having to manually input it which takes longer than the time savings offered by this feature.

# Mass Correspondence

- > Quicker process for sending out letter blasts to all agents on file....It takes in excess of 2 hours to send out a letter with a couple attachments, to 200 agents. The letter allows us to personalize, so we prefer this method over sending an email

# Reporting / Filters

- > Reports. When you copy a report and use it to change something, the original changes too
- > Report Development Wizard
- > Automatic E-mail Reporting is a great tool but it currently has a big limitation. As it stands you cannot specify a time for the reports to run
- > Automatic E-mail Reporting needs an option for no end date rather than a specific end date or an unlimited number of occurrences.

# Dynamic Reporting

- > Make sure Days in Underwriting is correct especially if the case is closed and reopened.
- > We need the ability to Filter by Risk Class in all Dynamic Reports
- > Include Policy Office Expiration & Carrier Expiration dates to Dynamic Reports
- > Multi-life reporting to include filters for Parent vs Child

# Dynamic Reporting

- > Allow reporting on Impairments
- > Reporting on POS – Requirements just like Pending Case – Requirements
- > Allow reporting on the Broker Dealer data in Advisor
- > Security to grant access only to select Dynamic Reports and not all Dynamic Reports

# Telephony

- Telephony Integration When phone rings, SmartOffice pops client
- Telephony Integration, click on phone number in record to dial.

# Advisor

- > Make Effective date of a state license optional and not mandatory
- > Enterprise View – Allow me to see the office on the Advisor screens.
- > When showing phone, fax and cell numbers for agent, use abbreviations like Bus:, Res, Cell, fax. (We need more Space!)

# Advisor

- > Allow PaperClip integration from all tabs of the Advisor
- > Rework the Continuing Education section to be more a Compliance section.
- > Open the fields for Broker Dealer and CRD # so I do not have to add the Broker Dealer as a Contact. Just make it free form.

# Production Dashboard

- > Agent Production Summary by Supervisor versus just the advisor record

# Proposal Tracking

- > We would like to be able to break out target/excess/1035 premiums.
- > We need the ability for the Proposals that are entered into SmartOffice to be assigned to another user and have the proposal activity added to the appropriate calendar.
- > We need the ability to launch to the contact from the Proposal.

# Advisor / Cases / Contacts

- > Enterprise View – Allow me to change the office assignment of Advisors / Cases etc
- > It would be helpful to be able to Merge Advisor and Contact records. We place most of our records in the Advisor section but SmartOffice seems more Contact oriented

# Follow-ups

- > Control over scheduling when follow ups appear. We would like to be able to schedule follow ups to pop up at certain times during the day, versus when we log into SmartOffice for the first time.
- > Have an easy way to clear requirements from the follow-up list (clear follow-up date without changing the status)

# Follow-ups

- > Make the Follow-up system Case based and not requirement based.
- > Have the follow-up date based on Business Days and not Calendar Days. So if the follow-up cycle is two days and today is Thursday it will show on Monday and not Saturday.
- > Prompt for letters if a requirement was changed.

# Pending Case

- > SO to generate an appointment requirement to the case when the advisor is not appointed
- > When you have a requirement outstanding carrier and you change the status, SO should not change from whom it is outstanding back to advisor
- > An easy way to get to the advisor's contracting screen from the pending case

# Pending Case

- > In a pending case, have the ability to adjust the size of the data window boxes because there's a LOT of space not being utilized on the screen
- > We would like to be able to change the Plan type after the case has been added.
- > Duplicate a plan design for Tracking for a spouse with ability to edit it

# Pending Case

- > Allow users to control defaults that show up in a record like entering plan design. Annual, tax qualified, Comprehensive, non-tobacco
- > Add Insurance Type of “settlements” to the current list of Life, Annuity, LTC etc.
- > Allow for two unique case records for SUL’s but link them together. This also will allow us to have two different paperclip files which we currently cannot.

# Pending Case

- > Does anyone use FILE LOCATION under important contacts and/or any of the information in Policy Relationship List on the detail page? We need more room on the detail page (to make important case notes or add who the agency marketing person is for this agent, etc) and the above two fields don't seem as important in case management
- > Can PENDING be an option for the status that is listed on detail page of pending case? Can we customize any of those listed statuses? Reason: we would like the status to show PENDING until we send case to carrier then change it to SUBMITTED. In this way the start date of the case will still show on the detail page

# Pending Case

- > The ability to track Annual Premium without entering a modal factor at the product level.
  - users should not be required to update product modal factor to display the correct Annual Premium
- > Add a status for Appeal (Appealing the underwriting decision)
- > Have a feature to automatically prompt to save age (if within a certain date)

# Pending Case

- > Put checks in place so a user cannot select an Inactive advisor
- > Allow the Case Manager to be linked to the Advisor and auto assign in pending case

# Requirements

- > When changing the status on a requirement to anything other than Received (which automatically assumes it's completed), we would like the option of clicking a completed box so that the requirement complete itself and removes the follow up date
- > Allow required of to be defined by Requirement (Service Provider, Advisor etc) during setup as well as if this requirement should be visible to the Advisor on correspondence and via SmartView for Advisor

# Requirements

- > Add a consolidated note feature so I can see all the notes for all the requirements in one click.
- > Add a column in Requirements for days pending (for reporting and visual purposes)

# Riders / Impairments

- > There are too many steps for assigning Riders to a case during case entry. Give me a pick list so I can pick several at the same time while still in the application entry screen. (Similar to selecting requirements)
- > Give me a flag there are riders on the case
- > Include Impairment selection during the add of a pending case.

# Status History

- > Allow the Remarks Column to be editable

# New Workflows

- > Have a Postponed Workflow
- > Have a Declined/Closed Workflow to prompt why a case was declined/Closed.
- > Have a Principal Review workflow
- > Allow a joint case to be split should one of the insureds be declined
- > Have a new Advisor Workflow to include licensing, E&O etc.

# New Workflows

- > Have a new Application Submission workflow
- > Integrate Proposal Tracking with the Pending Case Add Workflow
- > Introduce a follow-up period for Proposal Tracking
- > Have a workflow to change a declined Formal to an Informal

# Workflows

- > The Informal Application process needs to be reworked
- > The Proposal Tracking workflow process needs to be reworked
- > Remove Requirements with a status of For Your Records from the Follow-up workflow
- > Add Continuing Education as a Pending Case verification check

# Policy

- > The ability to store ancillary benefit data by line of coverage and class under the policy without utilizing the group plan screen/fields. Note: there should be enough room for multiple classes to include class definition, benefit, age reduction, and any other discrepancies (i.e. own occ. info on LTD)
- > Scheduled Premiums: We wish we could track premiums in years 2-10 or even 20

# General Policy

- Enhance LTC
- Enhance for Life Settlements
- Enhance DI
- Enhance Group Benefits
- Enhance Annuity
- Include Critical illness as a Policy type

# POS

- > Develop a POS workflow similar to Pending Case Workflows

# SmartPad

- > In the notes field, show to whom the note/email has been sent
- > Post an Email and have the option to exclude signature and/or disclaimer
- > Posting Emails should have the option to post to the case only and not the advisor, carrier, staff person etc.

# Carrier / Products etc

- > The ability to copy Carrier Underwriters and Home Office reps to another Carrier. For example, where ING has three Carriers identified I have to enter the information three times
- > Add the administrative ability to expire an underwriting classification within a carrier file so that it does not show up as a choice in the class list – just like expiring products in a carrier file

# Carrier / Products etc

- > Have an Interest Rate repository
- > Give an option to hide Inactive Carriers / Products from the list and from Dynamic reports

# Quick Search

- > Search Drop Down Box: We would like there to be more identifiers in the drop down. In instances where we have a contact or advisor with the same first and last name, you do not know which one is the correct one

# Mass Modify

- > The ability to mass modify contact information such as address, phone number, and email
- > An easier method to Mass Reassign Advisors – From → To and all information such as contracts, change commissions etc.

# Labels

- > Agent Daily Labels. It would be nice to have the ability to print them in the order they were entered ( for daily mail) – to speed up the mailroom process.

# Import

- > When importing lists, show duplicates before import is complete to avoid having to delete duplicates later
- > Policy Import from Excel for All Policy Types
- > When loading documents into SmartOffice (or any excel template, comma delimited file etc) remember the last folder you were in and begin in that same folder. Also allow multiple files to be brought into SmartOffice at the same time.

# CTM – Speed Receipt Entry

- > Allow child offices to view and run reports based on commission transactions entered on their behalf at the Parent level (speed receipt entry)
- > In relation to Premium Banding aka Graded Scale commissions we need the ability to process both incoming commissions and outgoing commissions via SRE.
- > Have one default commission dictionary to use for all carriers

# CTM

- > We have a need for a quick and easy way to update group commission projections
- > Commission Module: in carrier posting, for carriers who have several entries, when you hit NEXT, it only brings up one additional entry
- > Project about a month out on commission module posting, because some cases get paid before the policy date and you have to manually do each of them, and then every statement you get past that you have to do that as well.

# CTM

- > The ability to mass modify Advanced Commission Payouts (split) and have the modified split automatically update the Open Expected Commissions

# SmartView for Advisor

- > Allow my Advisors to see Proposals
- > Allow more control over what an advisor sees based on Requirement Sub-type vs having to individually select
- > Allow some reporting to be given to the advisor

# Citrix / Virtualization

- > Add Full Citrix support - EZ Data has many clients that use a Citrix environment to conduct business remotely on a daily basis. Smart Office often experiences reduced reliability and stability problems running in a Citrix environment. EZ-Data should adopt Citrix Support and have Citrix be a supported platform for the software so customers can receive software support on the Citrix platform.

# Virtualization

- > Full virtualization support. Virtualization has become mainstream. Most large organizations use virtualization to consolidate hardware, reduce costs, ETC. Currently EZ-Data does not support virtualization. EZ-Data should fully support and embrace server virtualization.

# ***Further Questions?***

***How Can We Be a Better  
Business Partner?***

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**Phone: (626) 585-3505 x7366**

*Thank you for your time and your business.*

# See you Soon!

