



Vertafore®

Vertafore for Education Providers

When your focus is educating professionals, it makes good business sense to lead by example.

You use the latest proven business practices and industry-leading tools to make the most of your resources and stay compliant. No doubt your clients want to learn from you.

Vertafore for Education Providers is the most powerful means available for maximizing your resources. It saves you time and money by electronically connecting you to state regulators—simplifying the administrative tasks required to manage education information. You can rely on our tools to help you quickly and efficiently file course approvals, offerings, completion rosters, and class schedules directly to state tracking systems.

Smart, Safe and Speedy Connections

Secure, direct connections to state insurance departments allow you to:

- Instantly add or modify offerings for approved courses
- Submit course rosters for individuals who have successfully completed a course (continuing education or pre-licensing where required) with a few simple clicks of the mouse
- Upload a file containing course rosters for individuals who have successfully completed a course (continuing education or pre-licensing where required)

Our toolkit for education providers also includes an online course application service, which allows you to submit an application for course approval in

one or more states. We support both home state approval applications and reciprocal approval applications based on the NAIC uniform continuing education reciprocity course filing form.

We also provide renewal services, which allow you to go to our website to retrieve a list of all your courses that are up for renewal in a particular state (or all states). You may then select which courses you'd like to renew, and we will collect the appropriate state fees electronically, and apply them to each course renewal invoice from the state.

You will have easy and immediate access to need-to-know real-time course approval status updates, and downloadable monthly billing files of all transactions processed through Vertafore.

Put Your Clients in the Know

Vertafore also provides your clients with easy access to business-critical information such as:

- Available classroom offerings
- Active courses approved by the state
- Active providers approved by the state
- Pre-licensing transcripts
- Continuing education transcripts.

Vertafore has a unique relationship with these states:

- Arizona
- Colorado
- Connecticut
- Georgia
- Idaho
- Indiana
- Minnesota
- Mississippi
- Nevada
- North Carolina
- Pennsylvania
- South Dakota
- Texas
- Utah
- Vermont
- Virginia
- West Virginia
- Wisconsin
- Wyoming



Education Services

Vertafore offers the following educational services available in individual states

Education Service	AZ	CO	CT	GA	ID	IN	MN	MS	NC	NV	PA	SD	TX	UT	VA	VT	WI	WV	WY
Classroom Offering	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
CE Course Completions	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
PE Course Completions		✓		✓		✓	✓	✓		✓	✓			✓			✓		
CE Completion Certificates	✓		✓		✓	✓		✓	✓			✓	✓	✓	✓	✓	✓	✓	
PE Completion Certificates						✓		✓		✓						✓			
Course Applications	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Course Renewals	✓	✓	✓		✓	✓	✓	✓			✓	✓	✓		✓		✓		✓
Course Assignments													✓						
Provider Applications		✓						✓			✓		✓				✓		✓
Provider Renewals							✓						✓						
CE Course Transcript	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
PE Course Transcript		✓		✓		✓	✓	✓		✓	✓			✓			✓		
Approved Provider Inquiry	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Approved Course Inquiry	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Classroom Offering Inquiry	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
CE Exemption Request													✓						

For more information about Vertafore for Education Providers, please contact us at 800.444.4813 or visit vertafore.com.



Vertafore delivers software and services that transform the business of insurance. Unique to the industry, more than 20,000 customers rely on Vertafore to provide integrated technology that connects the entire industry with the most complete source of solutions—agency management, rating and connectivity, content management and workflow, research solutions and producer lifecycle management—so their businesses run better and are more profitable. For more information about Vertafore, please visit vertafore.com.



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