

Cogitate

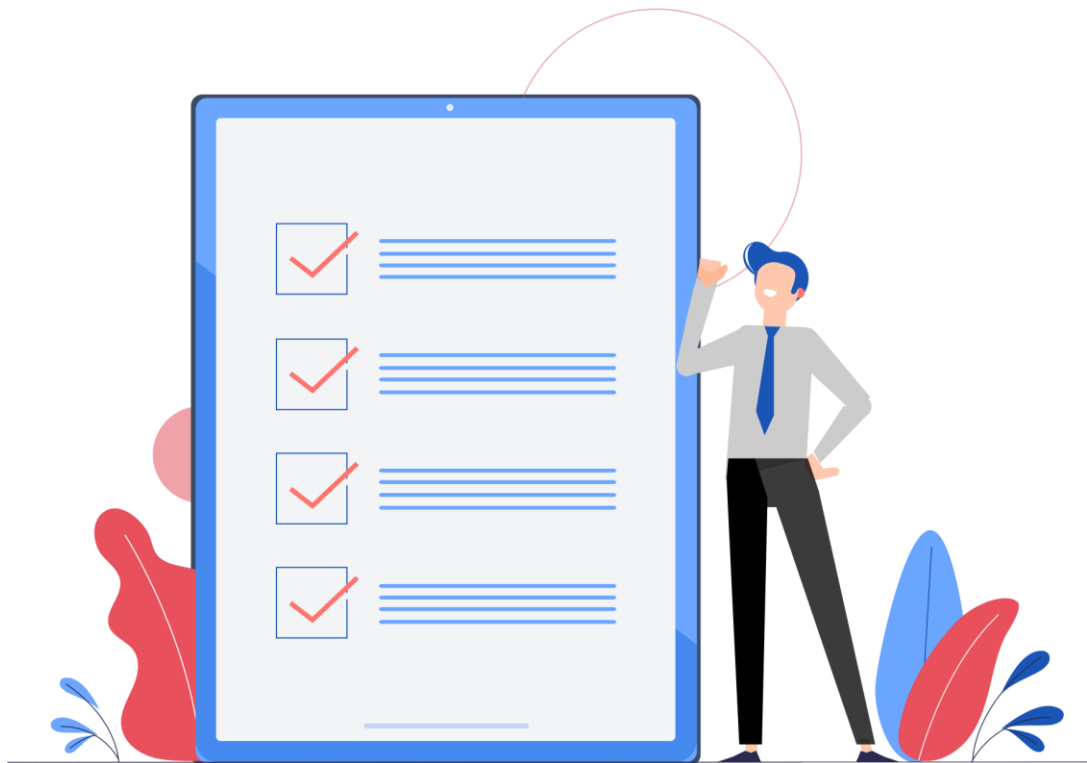
Digital Agency Appointment



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Cogitate Digital Agency Appointment is a modern, scalable application that enables MGAs and carriers to digitally appoint new agencies while significantly reducing the appointment time process. The Agency Appointment app resides on the MGA's or carrier's website. Agencies that are interested in working with the MGA or carrier are able to apply through their website by completing a simple online application form. On verifying the application, the agency can be onboarded within 24-48 hours to start producing business.

- Agency appointment timelines can be reduced to **24-48 hours**, compared to 7-10 days when processed manually
- Easy to use and navigate
- Prefilled forms avoid repetitive data entry
- Automatic notifications sent to the prospective agents and the MGAs/carriers regarding the application's progress
- Third-party integration with Interstate Background Research (IBR) used for rapid turnaround





Features

Quick and Easy Application Process

- Agents can submit an application in five easy steps
- All required forms are prefilled to avoid errors and reduce time spent re-entering the same data
 - W-9 Form: Request for Taxpayer Identification Number and Certification
 - Consumer Authorization Form
 - State-specific Criminal History Consent Form
 - E & O Declaration
- Built-in electronic signature for agencies before their information is submitted to the MGA or carrier
- Automatic updates to all stakeholders regarding application status

Integration with Interstate Background Research (IBR)

- Integrated with Interstate Background Research (IBR) for verification of an agent's criminal history
- Criminal History Consent Form sent automatically once the agent submits an application.
- Verification report from IBR directly populated in the DMS

CRM and Document Management System (DMS) Integration

- API-based integration with MGA's or carrier's DMS to easily store and retrieve applications for viewing
- Integrated with MGA's or carrier's CRM to complete an agent's appointment with the click of a button

