



PRODUCERMAX FAQ

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CHUM IT LLC

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What is ProducerMAX?

ProducerMAX is an easy-to-use CRM and Commissions tool designed for health insurance agents by integrating their data from carrier portals into the agent’s device using advanced encryption standards.

What are the major features of ProducerMAX?

- Import your Book of Business provided in carrier websites with a few clicks
- Capture client documents (like Medicare card, SOA) from your mobile app
- Encrypt your client data and documents per HIPAA and NAIC standards
- Forecast future earnings of Medicare plans
- Manage your licenses, certifications, contracts, appointments

How do I load my data?

You can download your Book of Business from carrier websites, and ProducerMAX team can help you to load your data.

What is unique about ProducerMAX from other CRMs?

- Customized for Health insurance agents with support to more than 100 carriers
- Unifies your Book of Business from carrier websites with just a few clicks
- Works on your device. No Cloud. No Internet
- Forecasts your Medicare commissions with basic information
- Track initial commissions and renewals on one screen

Why should I consider a CRM?

ProducerMAX keeps all your client information in your mobile so that you can give instant answer to your client queries. Also, ProducerMAX integrates all your clients across all carriers.

What subscriptions are available?

Basic	Standard	Premium
\$10 per month	\$25 per month	\$50 per month
✓ Computer app	✓ Computer app	✓ Computer application
✓ Technical Support	✓ Technical Support	✓ Technical Support
	✓ Mobile App - multiple devices	✓ Mobile App - multiple devices
	✓ Software training	✓ Software training
	✓ Data import assistance	✓ Data import assistance
		✓ Commission Projection module
		✓ Ongoing Support & Assistance

Will ProducerMAX track my commissions?

Yes. ProducerMAX automatically forecasts your Medicare monthly commissions. It helps you to quickly audit your commission statement to find unpaid or less paid clients.

Where will my data be stored? Will it be safe?

ProducerMAX stores your data and documents in your computer and mobile devices by using advanced encryption algorithms. It keeps you compliant with HIPAA and NAIC cybersecurity regulations.

Is there a trial version?

Yes, you can enjoy 1-month free trial version. The mobile app can be downloaded from the appstore Search for ProducerMAX (a single word). The ProducerMAX team helps you to install computer app on registering in their website or sending a trial request mail to sales@chumit.com

Can I see a video instead of attending the webinar?

Yes. Search for ProducerMAX (single word) in Youtube, or we can send you link <https://www.youtube.com/channel/UCY3pTjK7wWvWgFym3ImBvOA>

Are there training documents I can view?

You can find links of User guide within the respective computer/mobile app. If needed, we can email the document



ProducerMAX_MobileApp_UserGuide.pc

Mobile user guide →



ProducerMAX_UserGuide.pdf

Computer user guide →

Will I get training?

ProducerMAX team gives you a one-on-one training session until you feel comfortable with the software. Also, you will get training material for future reference

Do I need to sign any contract?

No. Similar to other software, you need to agree to the End User License Agreement (EULA). HIPAA BAA agreement can be provided based on request.

Can I access my data from a website?

No. ProducerMAX is available in Desktop and Mobile apps.

What are the limitations of the trial version?

During the trial period, you can get a Standard plan so that you can explore features of both computer and mobile apps. However, you will be restricted to move data between computer and mobile. Also, you won't be having full access to the Commissions module.

Does ProducerMAX support the Spanish language?

No. ProducerMAX comes in English only.

How do I move from another CRM tool?

We know moving your data from the current CRM tool is overwhelming and we will help you in the data migration.

What if I want to discontinue or unsubscribe?

You are the owner of your data. You can export data to Excel at any time or uninstall the app from all of your devices. If you are unsatisfied due to any issues in ProducerMAX, you will get a refund on a prorated basis.

What devices do you support?

Supports:

Windows – Windows 7 and above operating system

Apple – iOS 10.0 or later of iPhone and iPad

Android – Android 5.0 or later of Mobile and Tablet

Doesn't support:

MAC Computer and Windows mobile

Can I change my plan?

Absolutely. You can switch your plan at the beginning of every month.

Who can I contact for issues or support?

You can send email to support@chumit.com or call @502-836-6470