

# V3locity – A Cloud-based Platform for Administration, Engagement & Analytics

Success in today's world of increasing customer expectations, unbounded technology options, and relentless cost pressure requires unprecedented vision, agility, and near flawless execution. Your organization must get out and remain ahead of your customers' demands, your competitors' offerings, and your industry efficiency benchmarks. This means continually crafting and implementing new strategies, offerings, capabilities, and operating models.

Through effective leverage of cloud advantages, continuous innovation, and an accelerated delivery approach, Vitech helps organizations rise to this challenge and unleash their organizations' true potential. We deliver revolutionary capabilities and low-code configurability that enable agility, speed, and an effortless customer experience, all while reducing risks, simplifying operations, containing costs, and unleashing innovation and growth.

## V3locity Platform

V3locity®, Vitech's cloud-based administration, engagement, and analytics platform, is a transformative suite of complementary applications that offers full life cycle business functionality and robust enterprise capabilities. It marries core administration with a revolutionary digital experience. Its modular design enables flexible, agile deployment strategies. V3locity employs an advanced, cloud-native architecture that leverages the unique capabilities of AWS to deliver a solution with unparalleled security, scalability, and resiliency. V3locity's suite of applications includes CoreAdmin, DigitalCenter, DocsCenter, SalesCenter, ClaimsCenter and CampaignCenter.

### “SaaS” Simplicity

V3locity is a fully managed, “SaaS” style, zero-footprint solution. It offers 24/7 operations, vast scalability and high availability, all backed by industry leading SLA's.

### The Power of AWS

V3locity is underpinned by the power of AWS, leveraging a growing array of advantageous AWS technologies. This helps ensure that V3locity delivers ongoing innovations and improvements. V3locity is available in US, Canadian and European AWS regions.

### Componentized Architecture

A powerful, cloud-native microservice architecture makes V3locity extremely flexible, resilient, agile and scalable. Its various applications and capabilities can be used in almost any combination, and can be deployed using almost any roadmap strategy.

### Continuous Innovation

Vitech's relentless investment in V3locity's capabilities, technologies, accelerators and partner network ensures that V3locity is a vibrant, living solution that offers your organization opportunities for continuous innovation and improvement.

## The Applications of the V3locity Platform

V3locity is a suite of complementary applications, which includes CoreAdmin, DigitalCenter, DocsCenter, SalesCenter, ClaimsCenter and CampaignCenter. These applications can be used in almost any combination and can be deployed in almost any roadmap strategy.

### V3locity CoreAdmin

V3locity CoreAdmin is the heart of the suite. It offers extensive capabilities for group and individual benefit and investment administration. It is suitable for use by insurance, retirement, and investment organizations in support of a very broad range of products and offerings across the business life cycle. From quote to claim, from enrollment to retirement, from fund closing to final distribution... V3locity CoreAdmin offers the administrative capabilities you need to transform your organization.

An innovative and unique "World" model allows all members, employers, participants, investors, sponsors, funds, dependents, beneficiaries and providers to be maintained in a single repository where they are all transacted with in a similar fashion. This makes the solution incredibly effective to use, and extremely easy to learn. More importantly, it ensures that the solution is built on customer-first principles from the ground up.

#### Insurance Administration

V3locity is a powerful insurance administration solution that offers group, voluntary, worksite, and individual insurance capabilities in a single, powerful, integrated, cloud-based platform. V3locity's extensive core admin functions, advanced digital features and fluid configurability makes it a truly transformative solution. V3locity CoreAdmin addresses the full spectrum of policy administration needs ranging from onboarding, enrollment, and underwriting to commissions, billing, amendments and renewals. DigitalCenter, SalesCenter, ClaimsCenter, DocsCenter and CampaignCenter make V3locity a complete Quote to Claim insurance solution.

#### Retirement Administration

V3locity is a fully integrated, highly scalable solution that addresses the complex needs of Public Pension, Taft Hartley, Canadian, and Pension Risk Transfer plans. CoreAdmin addresses the full spectrum of requirements, including contracting, rates, enrollment, wage and contributions reporting, billing and collections, service credit purchases, refunds and buybacks, loans, plan rule definition, benefit estimate and calculations, and benefits payroll. DigitalCenter, DocsCenter and CampaignCenter make V3locity a complete pension solution.

#### Investment Administration

V3locity is a powerful solution for alternative asset, fund, and investment administration. CoreAdmin addresses the full spectrum of requirements, including fund setup, allocations, investor management, investment management, unitized pricing, contributions, distributions, liquidity rules, KYC/AML support and much more. DigitalCenter, DocsCenter and CampaignCenter make V3locity a complete investment administration solution.

## V3locity DigitalCenter

Offering a truly effortless customer experience and harnessing the benefits of straight-through processing requires outstanding digital capabilities that put administration and servicing features online in the hands of your customers and constituents. V3locity DigitalCenter, a persona-based self-service digital solution seamlessly integrated with CoreAdmin, delivers. It is a highly configurable, brandable, low-code, responsive self-service solution that runs on desktop, tablet, and mobile devices.

V3locity DigitalCenter offers personalized experiences for employers, employees, members and participants, investors, fund sponsors, brokers, and providers. It is WCAG compliant, low bandwidth optimized, and extremely secure. It optimizes the digital experience with an array of service capabilities channels including chat, secure message, knowledge base, and natural language service requests.

## V3locity ClaimsCenter

ClaimsCenter is a complete claims solution seamlessly integrated with CoreAdmin and DigitalCenter. It can be used stand-alone or as part of a complete, straight-through solution. ClaimsCenter supports a broad range of claims and product types including: Life, Disability, Health, Dental and Vision, Accident, Critical Illness, Hospital Indemnity and Credit Protection.

ClaimsCenter supports electronic, file-based, online and manual claims entry. It can achieve extremely high auto-adjudication rates for health and supplemental health claims. It includes an advanced provider master subsystem and fraud detection features. Claim risk rating and automated routing streamline internal processes. Good order rules, automated documentation requests and submission capabilities streamline external processing. True multi-tasking allows a claims operator to work with multiple claims at once while also accessing employer, provider, participant or plan data as needed. The system supports CPT, ICD, and custom coding. In combination with CoreAdmin, DocsCenter and DigitalCenter, it is a complete, end-to-end claims solution.

## V3locity SalesCenter

Quote, Rate and Propose with unprecedented speed, flexibility, and accuracy. V3locity Sales Center unleashes a fluid quoting process with flexible plan designs, automated rating calculations, powerful underwriting capabilities, presentation quality output and advanced process management features. Integrated digital capabilities offer a powerful, self-service "store front" experience for your brokers, producers and even individual customers. Dashboard, workflow, and task management tools streamline the end-to-end process and create a seamless transition from sold-case to onboarding. SalesCenter supports a broad range of products including: Life, Disability, Health, Dental and Vision, Accident, Critical Illness, Hospital Indemnity, Annuities and Structured Settlements, and Credit Protection.

## V3locity CampaignCenter

Proactive, targeted customer communications are paramount for success in a digital era. It can also be critical for regulatory compliance, renewal rates, participant education and general customer satisfaction. V3locity CampaignCenter is a complete, bi-directional, omnichannel communication and engagement solution.

V3locity CampaignCenter targets the right content, the right participant or customer, at the right time, using automated, configurable rules and logic. Any number of campaigns for an almost limitless number of purposes can be in process at the same time. Embedded analytics provide real-time campaign dashboarding, reporting and traceability. Seamless integration with CoreAdmin and DocsCenter creates a complete communication solution.

## V3locity DocsCenter

V3locity DocsCenter is an enterprise correspondence, forms and content solution that helps organizations deliver accurate, standardized, presentation quality communications. It is a cloud-native application for the creation, management, distribution and storage of template-based documents, letter, forms and other materials. Document templates are created using MS Word with a friendly and powerful V3locity plug-in. Templates are stored, managed and versioned in DocsCenter.

Document generation can be triggered directly by business users or automatically as part of an outreach campaign, batch process, or other event-based triggers. Document generation can occur asynchronously and supports an array output formats. Seamless integration with CoreAdmin, DigitalCenter and CampaignCenter makes DocsCenter a complete communication solution.

DocsCenter is suitable for documents including, but not limited to: contracts, certificates, retirement estimates, benefit booklets, proposals, quotations, letters & notices, and much more.

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## About Vitech

Vitech is a global provider of cloud-based benefit and investment administration software. We help our clients expand their offerings and capabilities, streamline their operations, gain analytical insights, and transform their engagement models. Vitech employs over 1,200 professionals serving over 100 of the world's most successful insurance, retirement and investment organizations. An innovator and visionary, Vitech has been recognized by Celent as a three-time XCelent award winner.

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