



DeepThought

Producer Portal & IMS Integration

A branded producer portal wired live to your IMS. Real IMS-rated quotes in seconds, bind to a real policy number, and no second system to reconcile.

CAPABILITIES OVERVIEW · 2026

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Every capability at a glance, tap any line to jump straight to it.

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Dynamic application, ~20 field types, rules & validation	

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The full lifecycle, written live to IMS	The complete capability set
One source of truth, no second system to reconcile	

What this is

Most producer portals are a form that emails a PDF, or a side database someone reconciles later. This one writes directly into your IMS. A broker completes a smart application, pulls a real IMS-rated quote, and binds to a real policy number, all in your policy system. Your team re-keys nothing.

This document is a **visual preview** of that product. Every screen shown is the real software running against a live policy system.

The shape of it: Producers work in a portal → submissions flow into the underwriting console → everything reads and writes to IMS as the system of record. Quote, bind, issue, endorse: one pipeline.

Part 1: The Producer Portal

The broker's experience: branded, secure, and built to take a submission all the way to a bound policy without a phone call or a spreadsheet.

1.1 · Branded sign-in & account security

Every MGA gets its own branded portal, on a dedicated subdomain by default, or its own custom domain via CNAME. Producers self-register, verify their email, and sign in, with **optional per-portal email one-time-passcode MFA** and automatic lockout protection.

SU

Summit Specialty Underwriters

Sign in

Email

Password

Forgot password?

Sign in

Don't have an account? [Create account](#)

Branded sign-in. The portal name, logo, and color are configured per MGA.

SU Summit Specialty Underwriters

Create your account

Email

Display name (optional)

Password

At least 12 characters with letters and a digit or symbol.

Confirm password

Create account

Already have an account? [Sign in](#)

Self-service registration with email verification.

SU Summit Specialty Underwriters

Enter verification code

We sent a 6-digit code to **jordan.brooks@summit-demo.com**. It expires in a few minutes.
6-digit code

Verify and sign in

[Send a new code](#)[Cancel](#)

Optional per-portal email one-time-passcode MFA.

Forgot-password and reset flows are included: account recovery without an admin ticket.

SU Summit Specialty Underwriters

Reset password

Enter your email and we'll send you a link to reset your password.

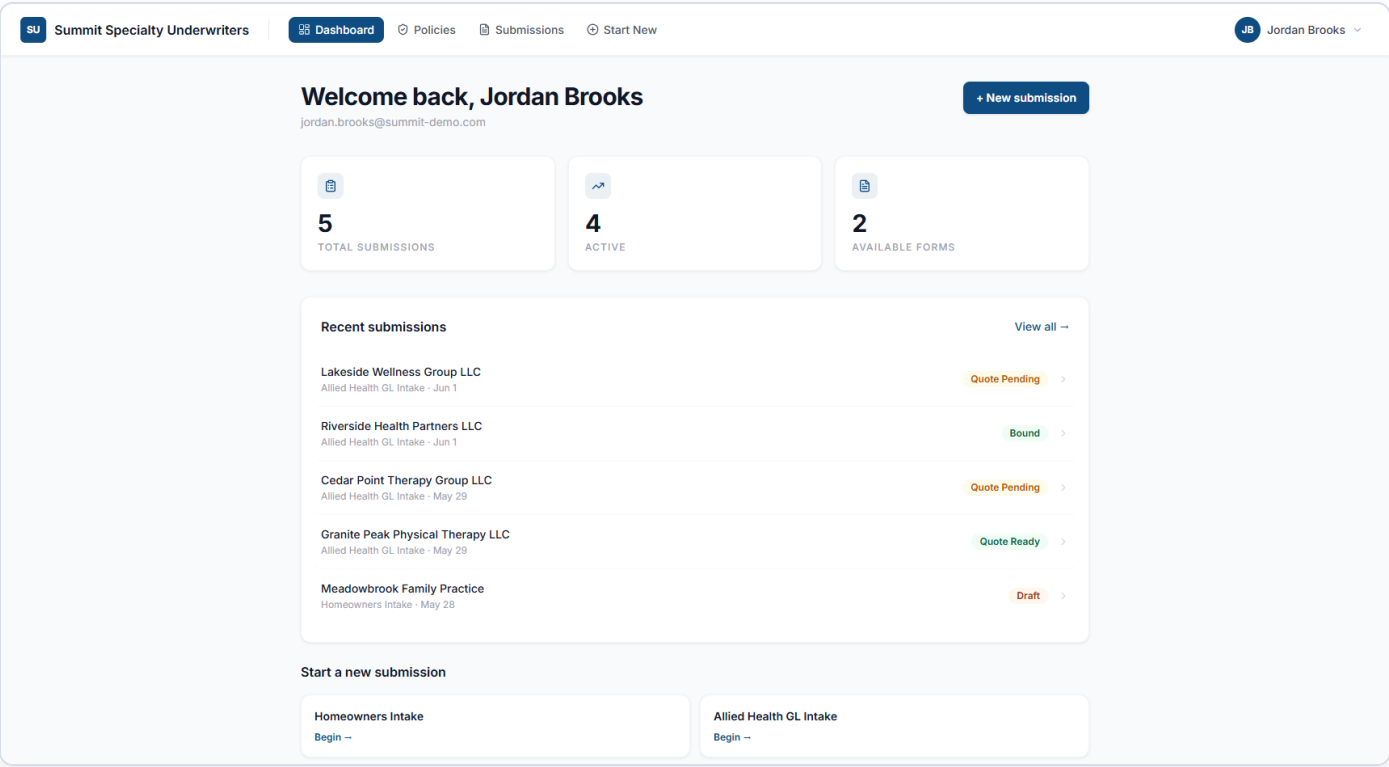
Email

Send reset link

[← Back to sign in](#)

1.2 · The producer dashboard

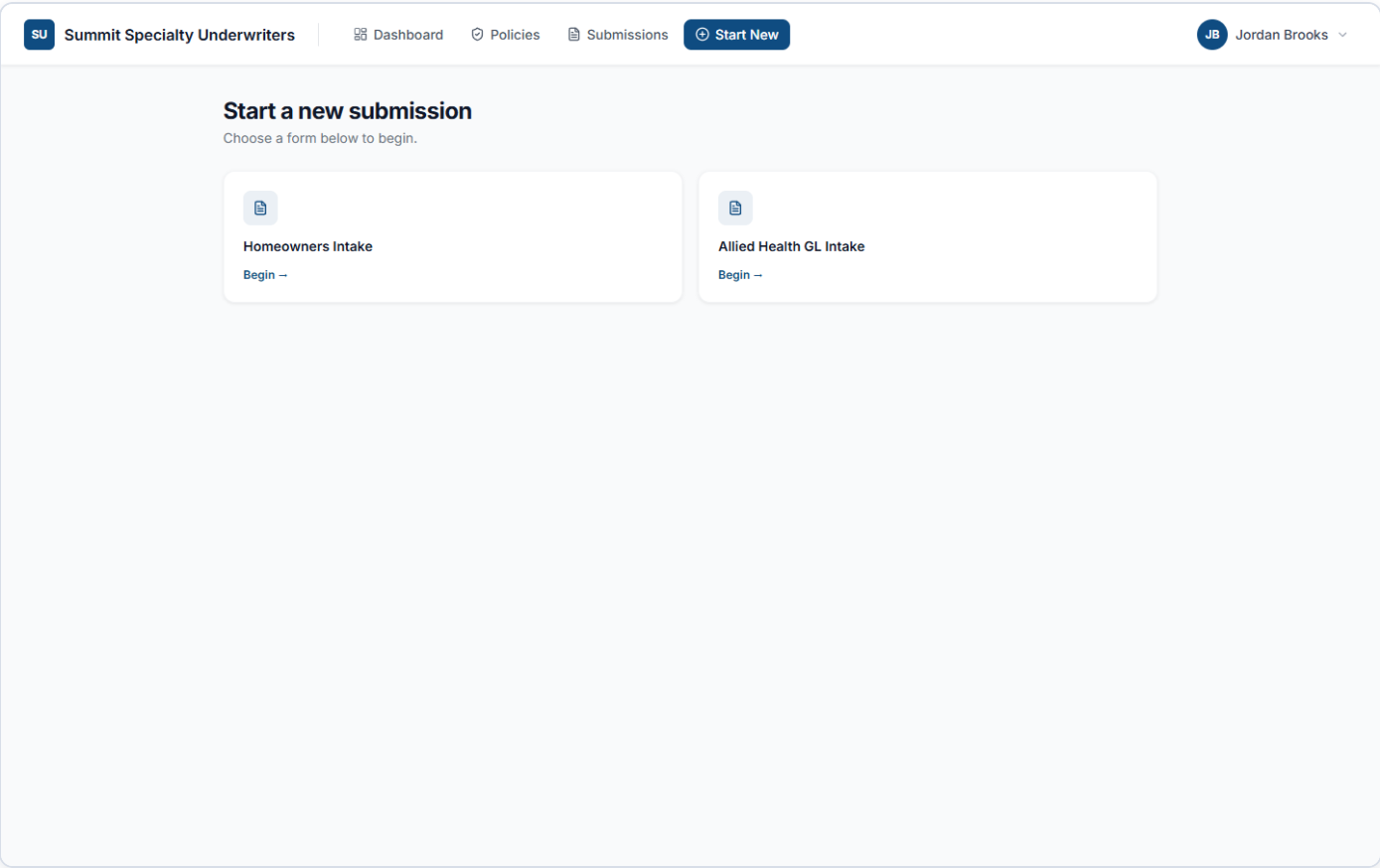
A clean home base: live submission counts, recent activity with real-time status, and one-click access to start a new submission.



Everything in flight at a glance: drafts, quotes, and bound policies, read live from your IMS.

1.3 · Smart intake

The heart of the portal. Producers pick a form, identify the insured, and complete a dynamic application, with guardrails that keep the data clean before it ever reaches underwriting.



Published intake forms; each tagged with a line of business and a kind (new business, endorsement, or renewal).

Insured pre-screen with live duplicate search

As the producer types the insured name, the portal searches the **live policy system** for existing matches, preventing duplicate insureds before a submission is created.

A screenshot of the 'Insured information' form. The form is titled 'Insured information' with a sub-header 'Tell us about the insured. This information will be used to create the submission record. You can update contact details later.' The form fields include: 'Business / Insured name*' (a text input with a placeholder 'Start typing the insured name...'), 'Business type*' (a dropdown menu with 'Select' as the selected option), 'EIN / FEIN' (a text input with '00-0000000'), 'MAILING ADDRESS' (a section with 'Address line 1*' as a text input, 'Suite / unit' as a text input, 'City*' as a text input, 'State*' as a dropdown menu, and 'ZIP*' as a text input), 'Phone' (a text input), and 'Contact email*' (a text input).

Capture the insured once; reuse everywhere.

A screenshot of the 'Insured information' form, similar to the previous one, but with the 'Business / Insured name*' field populated with 'Lakeside Wellness Group'. Below the input field, there is a message: 'No existing insured found -- a new one will be created.' The rest of the form fields are the same as in the previous screenshot.

Type-ahead checks IMS in real time, "new one will be created" when there's no match.

SU

Summit Specialty Underwriters

Dashboard

Policies

Submissions

Start New

JB

Jordan Brooks

Insured information

Tell us about the insured. This information will be used to create the submission record. You can update contact details later.

Business / insured name *

Lakeside Wellness Group LLC

No existing insured found — a new one will be created.

LLC

EIN / FEIN

47-2298104

MAILING ADDRESS

Address line 1 *

820 Lakeshore Drive

Suite / unit

City *

Madison

State *

WI

ZIP *

53703

Phone

(608) 555-0173

Contact email *

ops@lakeside-wellness.example

Clean, validated insured details, the foundation of the submission record.

AI document pre-fill + a dynamic application

Producers can **upload an ACORD or carrier application PDF and let AI pre-fill the matching fields**, then review and edit everything. The application itself is fully dynamic: ~20 field types (18 authorable in the visual builder), conditional logic, repeaters, computed values, and validation.

SU

Summit Specialty Underwriters

Dashboard

Policies

Submissions

Start New

JB

Jordan Brooks

Upload an ACORD or similar application — we'll pre-fill the matching fields for you. You can still review + edit everything before submitting.

Upload PDF

Application

Insured Information

Business / Organization Name *

Business Type *

— Select —

Federal EIN (FEIN)

XX-XXXXXXX

Street Address *

City *

State *

— Select —

ZIP Code *

Phone *

"Have an application PDF? We'll pre-fill the matching fields." Upload once, review, submit.

Review before submit

A final, friendly summary. Jump back to edit any section (answers are saved) before submitting.

SU

Summit Specialty Underwriters

Dashboard

Policies

Submissions

Start New

JB

Jordan Brooks

My Submissions

Review your submission

Please confirm your answers for Lakeside Wellness Group LLC before submitting. You can edit any section — your other answers are saved.

Insured

Business / Insured name

Lakeside Wellness Group LLC

Business type

LLC

EIN / FEIN

47-2298104

Address

820 Lakeshore Drive

City

Madison

State

WI

ZIP code

53703

Phone

(608) 555-0173

Contact email

ops@lakeside-wellness.example

Insured Information

Edit

Business / Organization Name

Lakeside Wellness Group LLC

Business Type

LLC

Federal EIN (FEIN)

47-2298104

Street Address

820 Lakeshore Drive

City

Madison

State

Washington

ZIP Code

53703

Phone

(608) 555-0173

Contact Email

ops@lakeside-wellness.example

Business Operations

Edit

Years in Business

9

Number of Employees

28

Annual Gross Revenue (\$)

2,150,000

Describe Operations

Outpatient behavioral health and wellness clinic offering counseling, physical therapy, and preventive care.

Coverage Requested

Edit

Requested Effective Date

Aug 1, 2026

GL Limit

\$1M / \$3M

Prior losses in past 5 years?

No

Loss History

Edit

Number of Prior Claims in the Last 5 Years

0

Document_upload

—

Back to form

Confirm and Submit

No surprises: the producer confirms every answer, organized by section.

1.4 · Live quoting, binding & the policy lifecycle

This is what sets DeepThought apart: the submission becomes a **real quote in the carrier's policy system**, rated by the live rater, then the producer can accept, bind, and receive a policy number, end to end. A producer binds only what you authorize. Anything outside their authority is submitted for a person to review, never bound automatically.

SU

Summit Specialty Underwriters

Dashboard

Policies

Submissions

Start New

JLB

Jordan Brooks

My Submissions

Quote Pending

Control #288143

Lakeside Wellness Group LLC

Submitted 6/1/2026, 3:04:27 PM

PrintRequest a change

Your underwriter is preparing a quote. This page checks for updates every 30 seconds.

QUOTE

Premium being calculated by underwriter...

EFFECTIVE

EXPIRATION

IMS STATUS

Jun 1, 2026

Jun 1, 2027

Submitted

APPLICATION

Refresh from IMS

Insured Information

Business / Organization Name

Lakeside Wellness Group LLC

Business Type

LLC

Federal EIN (FEIN)

47-2298104

Street Address

820 Lakeshore Drive

City

Madison

State

Washington

ZIP Code

53703

Phone

(608) 555-0173

Contact Email

ops@lakeside-wellness.example

Business Operations

Years in Business

9

Number of Employees

28

Annual Gross Revenue (\$)

2,150,000

Describe Operations

Outpatient behavioral health and wellness clinic offering counseling, physical therapy, and preventive care.

Coverage Requested

Requested Effective Date

Aug 1, 2026

GL Limit

\$1M / \$3M

Prior losses in past 5 years?

No

Loss History

Number of Prior Claims in the Last 5 Years

0

Document_upload

—

DOCUMENTS

No documents yet — they will appear here once your underwriter generates them.

Ask a question about this submission

Quick answers about form fields, your submission's status, and what's next. I'm read-only — I can't submit, bind, or issue for you; use the action buttons above for that.

e.g. why was this referred?

Ask

All submissions

Start new submission

The submission detail page, live IMS status, the full application, and a read-only AI assistant that answers "what's the status and what happens next?"

A real, bound policy, created in IMS

After the quote is accepted and bound, the producer sees the **live premium, IMS control number, and a real policy number**, all generated in the policy administration system.

SU

Summit Specialty Underwriters

Dashboard

Policies

Submissions

Start New

JB

Jordan Brooks

My Submissions

Bound

Control #288141

Policy SSU-0100000236-00

Riverside Health Partners LLC

Submitted 6/1/2026, 1:05:36 PM

PrintRequest a change

Your policy is bound. Policy documents will appear below as they become available.

QUOTE

\$4,475.00

total

Premium

\$4,475.00

Total

\$4,475.00

EFFECTIVE

EXPIRATION

IMS STATUS

Jun 1, 2026

Jun 1, 2027

Bound

Issue Policy

APPLICATION

Refresh from IMS

Insured Information

Business / Organization Name

Riverside Health Partners LLC

Business Type

LLC

Federal EIN (FEIN)

88-1234567

Street Address

1450 Magnolia Avenue

City

Riverside

State

California

ZIP Code

92501

Phone

(951) 555-0142

Contact Email

underwriting@riversidehp.example

Business Operations

Years in Business

12

Number of Employees

45

Annual Gross Revenue (\$)

3,200,000

Describe Operations

Outpatient physical therapy and occupational health clinic serving the Inland Empire region.

Coverage Requested

Requested Effective Date

Jul 1, 2026

GL Limit

\$2M / \$4M

Prior losses in past 5 years?

No

Loss History

Number of Prior Claims in the Last 5 Years

0

Document_upload

—

DOCUMENTS

No documents yet — they will appear here once your underwriter generates them.

Ask a question about this submission

Quick answers about form fields, your submission's status, and what's next. I'm read-only — I can't submit, bind, or issue for you; use the action buttons above for that.

e.g. why was this referred?

Ask

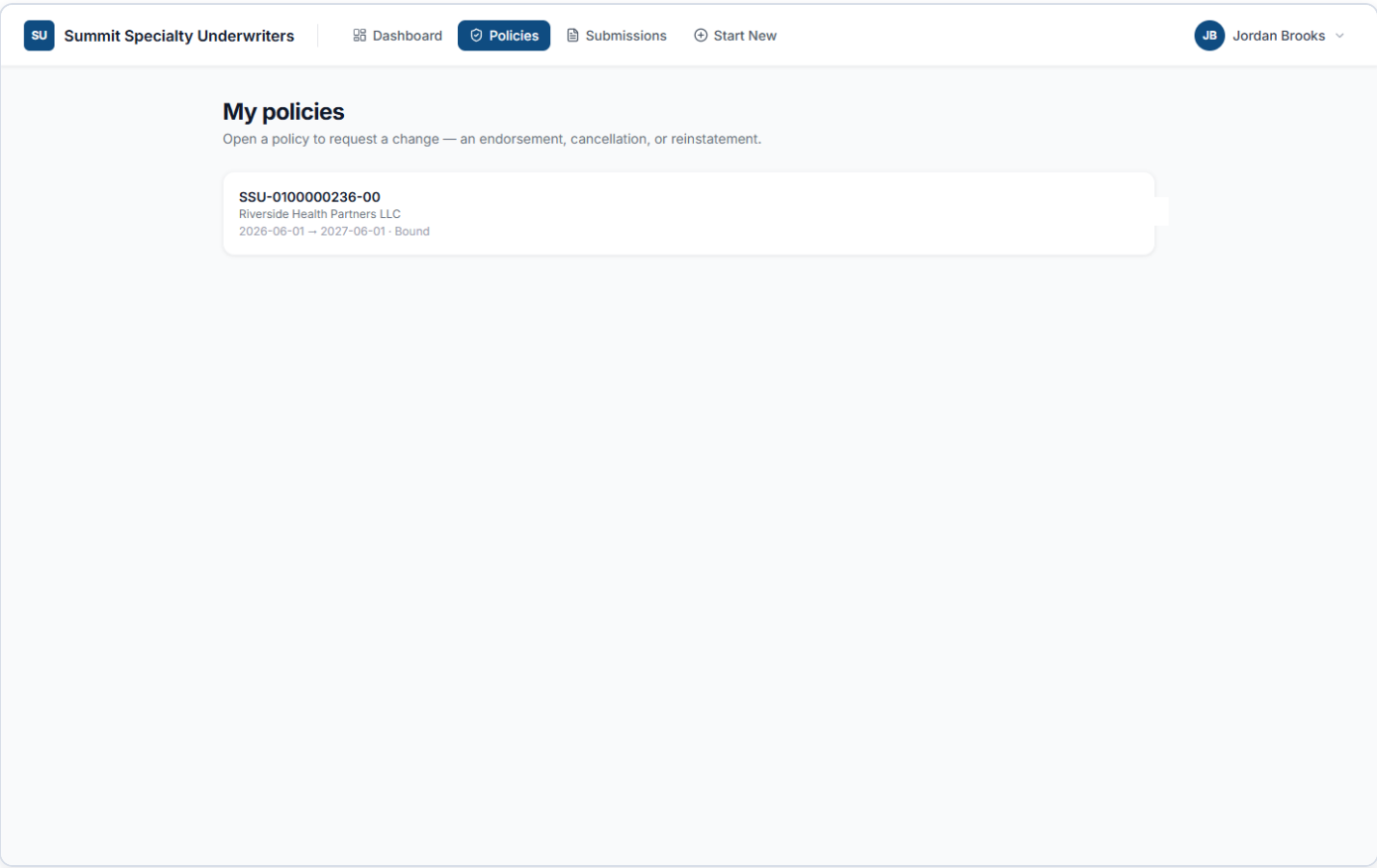
All submissions

Start new submission

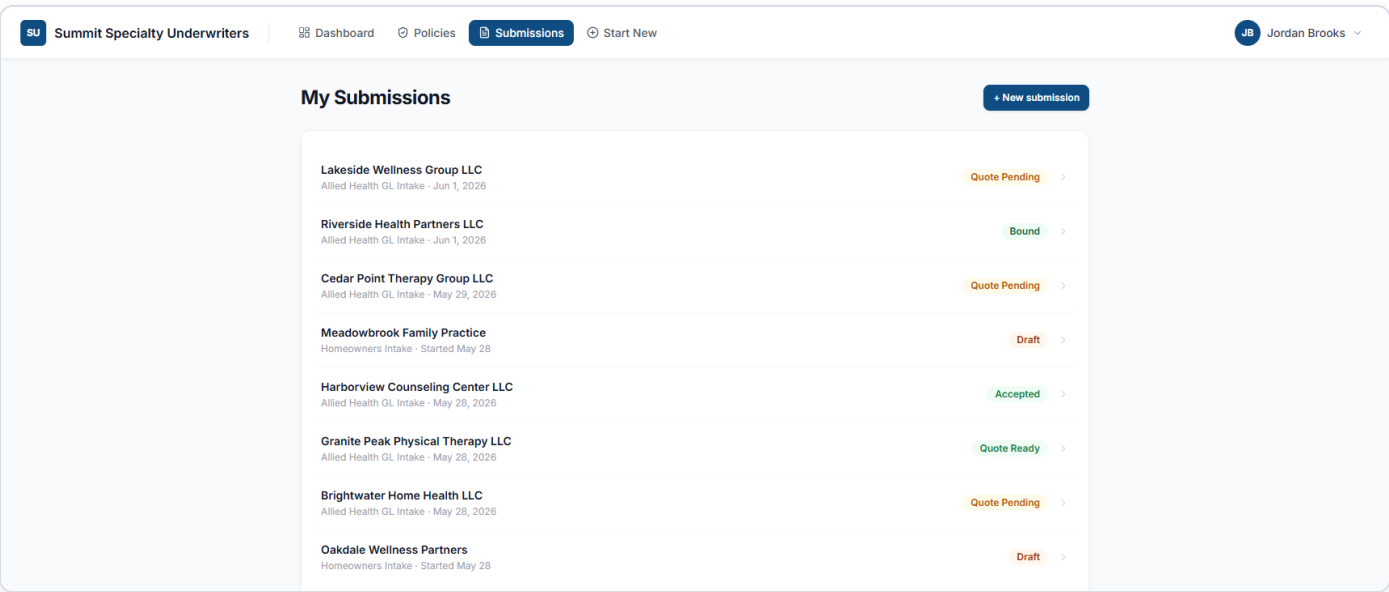
A real \$4,475 premium from the live rater, bound to a real IMS policy number. The broker never left the portal, and nobody on your side re-keyed a thing.

1.5 · Policies & self-service servicing

Producers see their **book of policies pulled live from IMS**, and can **initiate** mid-term changes (endorsements, cancellations, reinstatements) from a policy. The portal opens the right action for the policy's live status; an underwriter then prices and finalizes the change in IMS.



Bound policies, live from the policy system, with a path to request changes.



Every submission in one list, color-coded by lifecycle stage: Draft → Quote → Bound.

1.6 · Producer profile

Each portal has its own URL and its own session, so a producer signs in to the specific MGA portal they're working in, and manages their display name and password there.

Brokers who place business with more than one MGA on the platform can be granted access to several portals. An **optional shared-identity layer** adds single sign-on across them: one login, a tile picker of the portals they're approved for, and a hand-off into each without re-entering a password.

The screenshot displays the 'Summit Specialty Underwriters' (SU) interface. At the top, a navigation bar includes the SU logo, a menu with 'Dashboard', 'Policies', 'Submissions', and 'Start New', and a user profile for 'Jordan Brooks'. The main content area features a profile card for 'Jordan Brooks' with the email 'jordan.brooks@summit-demo.com'. Below the profile card are two form sections. The first section, 'Display name', contains a text input field with 'Jordan Brooks', a small instruction 'How your name appears on submissions.', and a 'Save name' button. The second section, 'Change password', contains three text input fields: 'Current password', 'New password', and 'Confirm new password'. A note below the 'New password' field states 'At least 12 characters with letters and a digit or symbol.' A 'Change password' button is located at the bottom of this section.

Self-service account management, no admin involvement required.

Part 2: The Admin Console

The MGA's back office. Operations staff configure portals, design intake forms with no code, manage producers, and govern compliance, all without a developer.

2.1 · Forms: list & kinds

Producer Portals

Summit Specialty Underwriters

summit-specialty

PublishedUnpublishArchive

Dashboard

Producers

Submissions

Forms

Settings

Notifications

Renewals

Intake forms

All

Create a new form

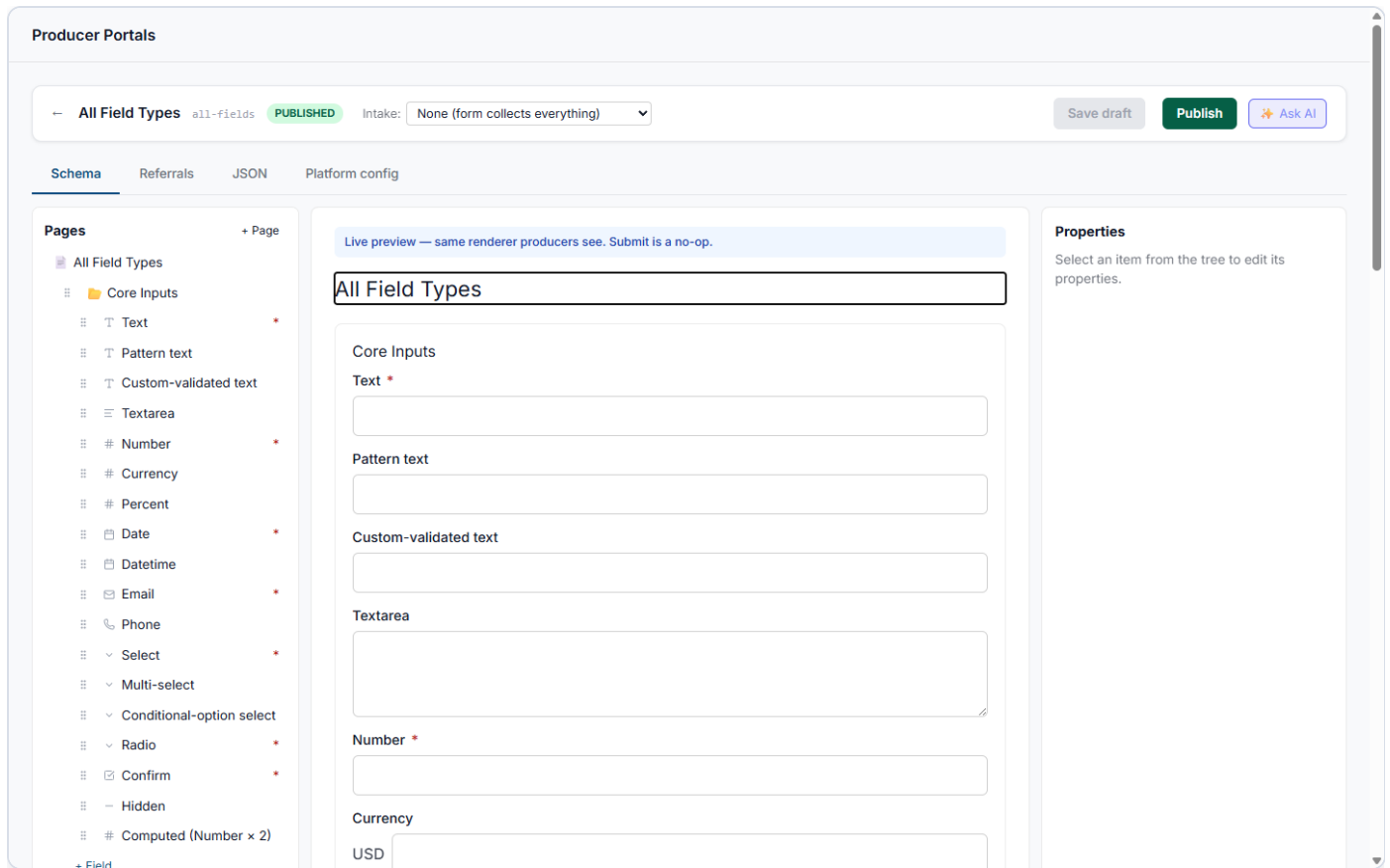
commercial-autoCommercial Auto IntakeLine GUID (optional)New businessCreate form

Name	Slug	Kind	Line	Status	Access	Updated
Homeowners Intake	homeowners	New	—	Published	Open	5/28/2026
Allied Health GL Intake	allied-health-gl	New	—	Published	Open	5/29/2026

Every intake form, with its slug, kind, and publish status. New-business, endorsement, and renewal kinds are all supported.

2.2 · The visual form builder

A **no-code, three-pane form designer**: a field tree on the left, a live preview in the center (the exact renderer producers see), and a property editor on the right. 20 field types, drag-to-reorder, and an **"Ask AI" button that generates a form from a description**.



Design once; the live preview is pixel-identical to the producer experience.

Per-field rules & conditional logic

Every field has a property panel: label, help text, validation, **conditional "visible-when" / "required-when" rules** built visually, and endorsement-scoping. No code required.

The screenshot shows the 'Producer Portals' configuration interface. At the top, there's a header with 'Producer Portals' and a navigation bar with 'All Field Types', 'Referrals', 'JSON', and 'Platform config'. Below the header, there's a status bar showing 'all-fields', 'PUBLISHED', and 'Intake: None (form collects everything)'. There are buttons for 'Save draft', 'Publish', and 'Ask AI'. The main content area is divided into three panels. The left panel, titled 'Pages', shows a tree view of field types: 'All Field Types', 'Core Inputs', 'Text', 'Pattern text', 'Custom-validated text', 'Textarea', 'Number', 'Currency', 'Percent', 'Date', 'Datetime', 'Email', 'Phone', 'Select', 'Multi-select', 'Conditional-option select', 'Radio', 'Confirm', 'Hidden', and 'Computed (Number x 2)'. The middle panel, titled 'All Field Types', shows a 'Live preview' and a list of field types: 'Core Inputs', 'Text', 'Pattern text', 'Custom-validated text', 'Textarea', 'Number', 'Currency', and 'USD'. The right panel, titled 'Properties', shows the configuration for the 'f_select' field. It includes fields for 'Field id', 'Type', 'Label', 'Help text', 'Required' (checked), 'Required only when (optional)' (with a condition), 'Visible when (optional)' (with a condition), 'Editable on changes' (set to 'Inherit form default'), and 'Applies to form kinds'.

Point-and-click conditional logic and validation per field.

Mapping the form into IMS

Forms route into the policy system through a configuration panel: line of business, carrier, locations, underwriter, and producer-contact mapping.

Producer Portals

← Allied Health GL Intake

allied-health-gl

PUBLISHED

Intake: IMS — standard insured pre-screen

Save draft

Publish

Ask AI

Schema

Referrals

JSON

Platform config

IMS Integration

Configure how submissions route into IMS — routing, rater, and lifecycle toggles.

Load from IMS

✓ Loaded 132 lines · 111 locations · 190 underwriters

ROUTING

Line of Business

Allied Healthcare

✓ Allied Healthcare

Company / Carrier

— select —

IstCompanies.CompanyGUID

Locations

Quoting Location

b69f47c4-a6a8-455c-8552-7a709537d9d3

Rating office (also used as the quote's company location)

Issuing Location

b69f47c4-a6a8-455c-8552-7a709537d9d3

Policy issuance office

PEOPLE

Default Underwriter

Jordan Avery

✓ Jordan Avery

Producer Contact

85f70787-d43f-425c-8c42-76fd6f20b334

Default — overridable per producer in the Producers tab

Underwriter and Producer Contact are defaults. The underwriter can be reassigned by Dynamic Routing Rules; the producer contact falls back to each producer's own IMS contact.

Connect a form to IMS routing without touching code.

2.3 · Portal settings & compliance

One settings page governs branding, signup mode, portal-wide producer permissions (submit / quote / bind / issue), and **OFAC sanctions screening**. Every insured is checked against the live Treasury SDN + Consolidated lists, and matches above the threshold are held for review. Screening is deliberately conservative, and nothing is auto-declined. A match holds the file for a person.

Producer Portals

Summit Specialty Underwriters

summit-specialty

PublishedUnpublishArchive

Dashboard

Producers

Submissions

Forms

Settings

Notifications

Renewals

Portal settings

Platform: ims IMS instance: b596f59a...

DISPLAY NAME

SIGNUP MODE

BRAND COLOR

Summit Specialty Underwriters

Open (anyone can sign up)

LOCKOUT AFTER N FAILED LOGINS

LOCKOUT DURATION (MINUTES)

10

15

☐ Require admin approval on signup

☒ MFA required (email OTP)

☐ AI assistant enabled

DEFAULT PRODUCER GRANTS

☒ submit

☐ quote

☐ bind

☐ issue

OFAC SANCTIONS SCREENING

Screens each insured against the Treasury SDN + Consolidated lists on submission. A match at or above the threshold holds the submission for compliance review before a quote is created.

REVIEW THRESHOLD (0-100)

RE-SCREEN ENDORSEMENTS

☒ Enable OFAC screening

70

All endorsement transactions

19014 SDN + 442 consolidated entries loaded · updated 5/29/2026

Refresh sanctions list now

INSURED SEARCH SCOPE

Controls which existing insureds a producer can find and attach to when starting a new submission. The whole-instance dedup check still runs on submit either way — this only governs what the typeahead reveals.

PRODUCER TYPEAHEAD SHOWS

Their own book only (recommended)

FALLBACK PRODUCER CONTACT

Optional. When set, submissions from producers whose email doesn't match any active IMS contact are attributed to this catch-all contact (audited as fallback). When unset, those submissions hard-fail so the producer is told to contact their admin.

Load IMS contacts

Save settings

Domains

Hostname	TLS	Primary
producers.summit-specialty.com	active	★
summit-specialty.42ims.com	active	
submit.acmeqa.com		

Add custom domain

API Keys

Generate API keys so DeepThought or other integrations can access the portal admin API without a browser session. Store keys securely — they are shown only once.

Key name (e.g. DeepThought)

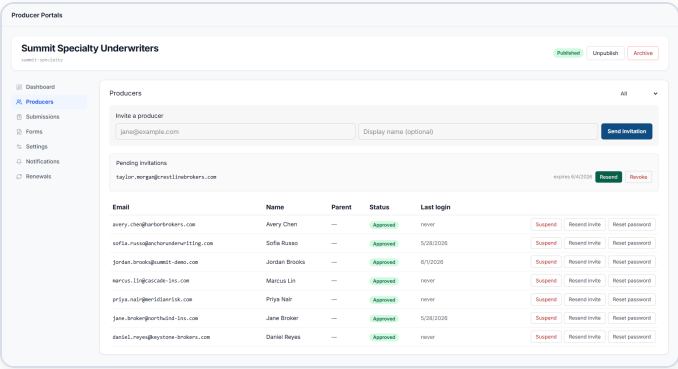
Generate key

Name	Prefix	Created	Last used	
Summit Specialty Underwriters	pak_6c6e82d6...	5/27/2026	Never	Revoke
DeepThought (reconnect)	pak_40f67965...	5/27/2026	5/27/2026	Revoke
DeepThought (auto)	pak_e871706c...	5/27/2026	Never	Revoke

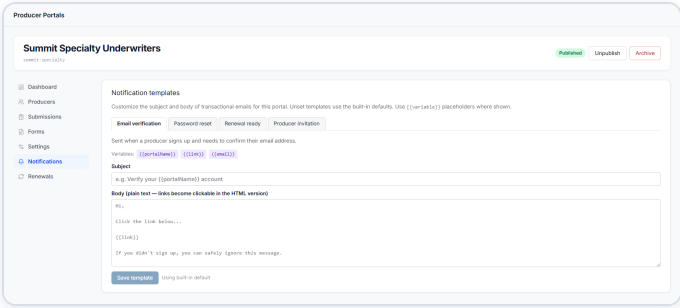
Using this key in DeepThought: Go to Settings → Connections → Producer Portal. Enter this portal's URL and paste the API key. Once configured, the portal admin panel opens automatically with single sign-on.

OFAC screening against the live Treasury sanctions lists (~19k entries, refreshed daily) · portal-wide producer permissions · custom domains · integration API keys.

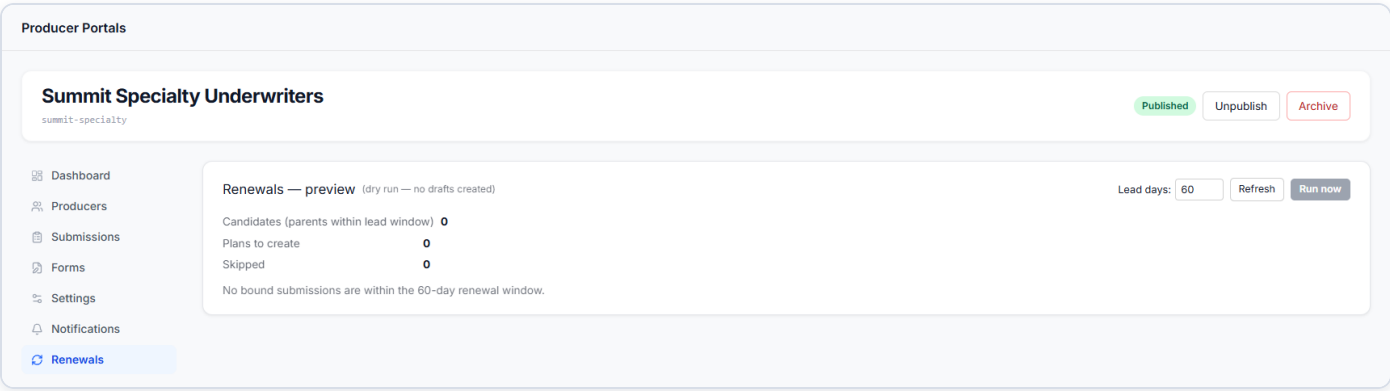
2.4 · Producers, notifications & renewals



Invite, approve, suspend, and reset producers, with parent/child relationships.



Branded, editable transactional emails with merge variables.



A renewal scheduler that previews bound submissions due for renewal before creating renewal drafts.

Part 3: How it connects to IMS

Everything above is real because the portal is **deeply integrated with the policy administration system (IMS)**, not a side database that someone reconciles later.

Across the submission lifecycle, DeepThought:

1. **Creates the insured** in IMS (with live duplicate clearance).
2. **Creates the submission and quote**, routed to the right line, carrier, and office.
3. **Runs the live IMS rater** to produce a real premium (where a rater is configured for that line/carrier).
4. On the producer's action (subject to underwriting gates), **binds and issues** through the policy system's native methods, returning a real policy number it reads back from IMS to confirm.
5. **Reads policies, premiums, and documents back** from IMS, so the portal always shows the system of record.
6. **Screens for OFAC** and routes referrals (re-screening on endorsement transactions).

It drives the same IMS engine an **underwriter's workbench drives** (the same SOAP methods, rater import, and policy-transaction procedures), so the portal is the broker-facing front door to it. A producer self-serves the parts an MGA wants to delegate; the underwriting team keeps full control in IMS for everything else.

The portal reads and writes your IMS directly across the lifecycle, with no side database and no reconciliation step. New business, endorsements, cancellations, and renewals all write back to IMS as the system of record.

Day one, your team maps IMS fields with us and sets the rules. Day fifty, the work is approvals and appetite, not babysitting a system.

One source of truth. Because the portal reads and writes IMS directly, there is no second system to reconcile. What the broker sees is what the carrier system holds.

What you get

One platform takes a broker from sign-in through a bound, issued, and serviced policy, with your underwriting team in control the whole way.

Capability	Status
Branded per-portal sites, producer accounts, optional email one-time-passcode MFA	Live
No-code form builder: 20 field types, conditional logic, AI form generation	Live
AI ACORD and PDF application pre-fill	Live
Live insured duplicate search against IMS	Live
New business: create the insured, quote, and a real rated premium from your IMS	Live
Accept, bind, and issue to a real IMS policy number	Live
Mid-term servicing: endorsements, cancellations, and reinstatements	Live
Renewals: scheduler, preview, and write-back to IMS	Live
Policies, premiums, and documents read live from IMS	Live
OFAC sanctions screening with a review queue, plus referral and routing rules	Live
Read-only producer AI assistant	Live
Branded notification templates	Live
Cross-MGA producer single sign-on	Live

Every screen in this document is the live product, captured against a real policy system.