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YOUR
POSSIBLE.

SIRCON FOR CARRIERS

Adding and Searching for Producers

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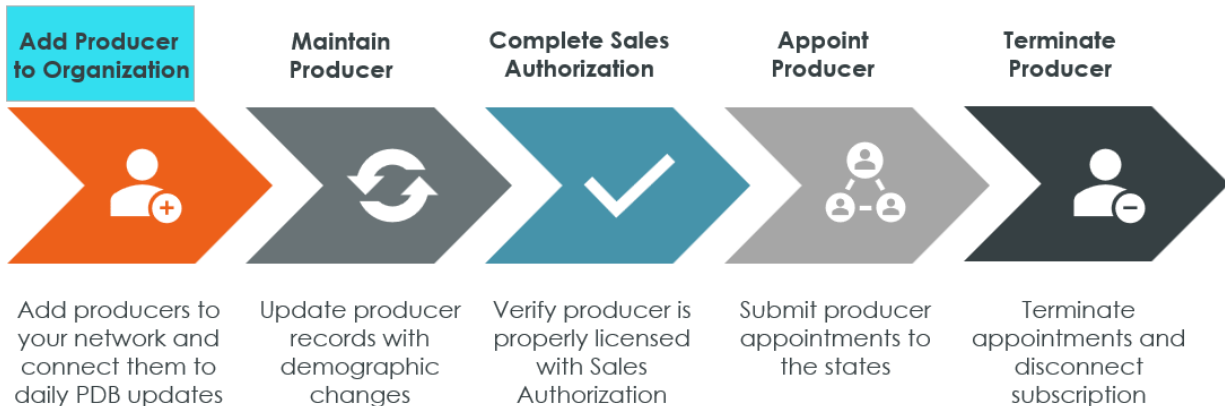
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Overview

In this quick guide, we will review how to add and search for producers/firms in Sircon for Carriers.

Producer Lifecycle Management



The first step to manage your producers is to add producers to your organization. You can add individual licensees (such as producers and adjusters) or firms (such as agencies and securities firms).

When you add a producer to your network, Producer Central will create a **Producer Record** and will connect the producer to your account. A producer record stores all the relevant licensing and compliance information in one location. Here you can see information like:

- Producer Demographics
- Licenses
- Lines of Authority / Qualifications
- Appointments
- Employment History

When a producer is connected to your account, Producer Central will sync with the Producer Database (PDB) daily to keep the producer record up to date.

You only need to add a producer once. After they are added to your network, you can disconnect the producer from your organization to stop receiving PDB updates.

Note: Your organization is charged based on the number of connected producers you maintain in Sircon for Carriers.

Section: Overview

Once you add a producer to your organization, you can:

- View their Producer Record
- Search for the Producer
- Add Appointments
- Assign the producer to Business Units and Cost Centers

In this quick guide, we will review how to:

1. Add Producers to Producer Central
2. Search for Producers
3. Tour the Producer Record

Note: Additional quick guides will cover how to [maintain producer records](#), [complete sales authorizations](#), and [complete appointments and terminations](#).

Section: Add Producers to your Organization

Add Producers to your Organization

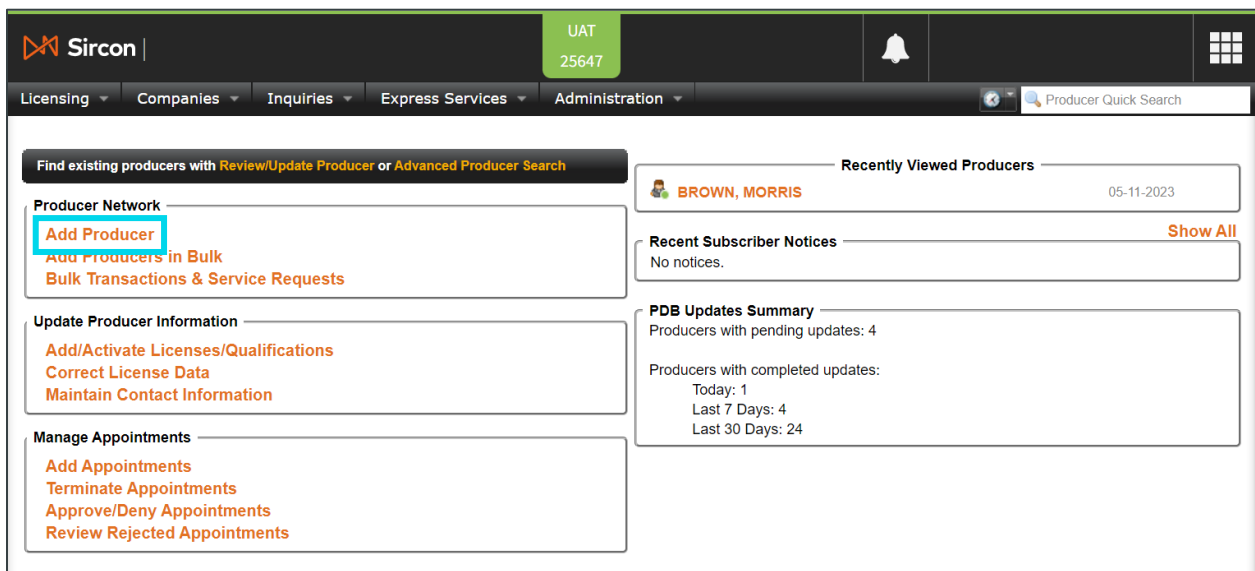
In this section, we will learn how to add producers to your organization. There are two different ways you can add producers:

- Add a Single Producer
- Add Multiple Producers in Bulk

Add a Single Producer

Use this process to add a single producer to your organization. Follow these steps if you have a small number of producers you need to add to your account.

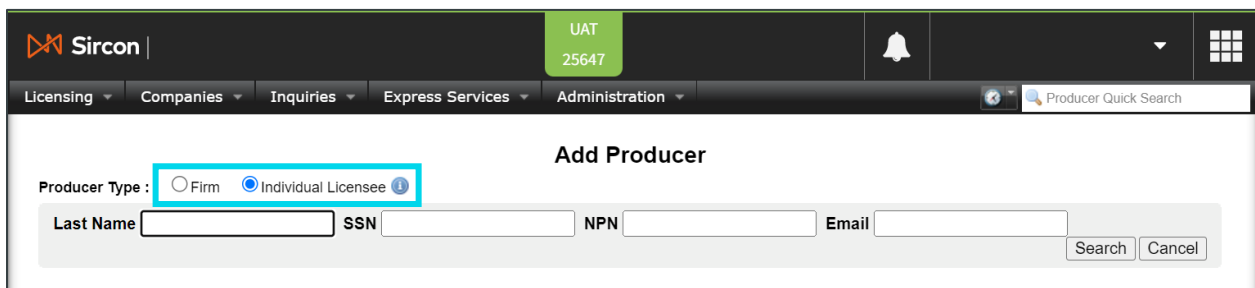
1. Start by clicking the **Add Producer** button under the **Producer Network** section of the main page of Producer Central.



The screenshot shows the Sircon Producer Central dashboard. The top navigation bar includes the Sircon logo, a user profile (UAT 25647), a notification bell, and a grid icon. Below the navigation bar are tabs for Licensing, Companies, Inquiries, Express Services, and Administration. The main content area is divided into several sections:

- Producer Network:** Contains the **Add Producer** button (highlighted with a red box), **Add Producers in Bulk**, and **Bulk Transactions & Service Requests**.
- Update Producer Information:** Contains **Add/Activate Licenses/Qualifications**, **Correct License Data**, and **Maintain Contact Information**.
- Manage Appointments:** Contains **Add Appointments**, **Terminate Appointments**, **Approve/Deny Appointments**, and **Review Rejected Appointments**.
- Recently Viewed Producers:** Shows a producer named **BROWN, MORRIS** with a date of 05-11-2023.
- Recent Subscriber Notices:** Shows "No notices." with a **Show All** link.
- PDB Updates Summary:** Shows "Producers with pending updates: 4" and "Producers with completed updates: Today: 1, Last 7 Days: 4, Last 30 Days: 24".

2. From the **Producer Type** field, select either **Individual Licensee** or **Firm**. The criteria you need to enter will change depending on this field.



The screenshot shows the "Add Producer" form in the Sircon Producer Central dashboard. The form is titled "Add Producer" and includes the following fields:

- Producer Type:** A radio button selection with **Firm** and **Individual Licensee** options. The **Individual Licensee** option is selected and highlighted with a red box.
- Last Name:** A text input field.
- SSN:** A text input field.
- NPN:** A text input field.
- Email:** A text input field.
- Search** and **Cancel** buttons.

Section: Add Producers to your Organization

ADD AN INDIVIDUAL LICENSEE

You can add producers to your network using their **NPN** number or their **SSN** number.

Note: The business rules set up by your organization determine whether you add producers with their **SSN** or **NPN**. If you aren't sure which information to use, contact your local administrator.

Add Producer with an Existing NPN Number

1. To add an individual licensee that has an **NPN**, start by entering the **Last Name** of the producer then type their full **NPN** number. You can also narrow down the search by including the **Email**.
2. Click **Search**.

Add Producer

Producer Type : Firm Individual Licensee ⓘ

Last Name SSN NPN Email

3. Producer Central will compare your search criteria with the information available on the PDB. If a record is found, you will see the details on the screen.
4. Click **Add Producer**.

Add Producer

Producer Type : Firm Individual Licensee ⓘ

Last Name SSN NPN Email

1 PDB entry was found:

Name	Birth Date	Resident State	Last Updated
<input checked="" type="radio"/> Easley, Cora	12/23/1961	Virginia	05-17-2023

5. You will receive a message that the producer is connected to Producer Central. Sircon will compare data with the PDB and will refresh the producer record.
6. Click **Review this producer** to view the producer record or click **Add another producer** to return to the previous screen to add a new producer.

Add Producer

✔ **Cora Easley** has been connected to Producer Manager.
Sircon will begin refreshing producer data within a few moments.

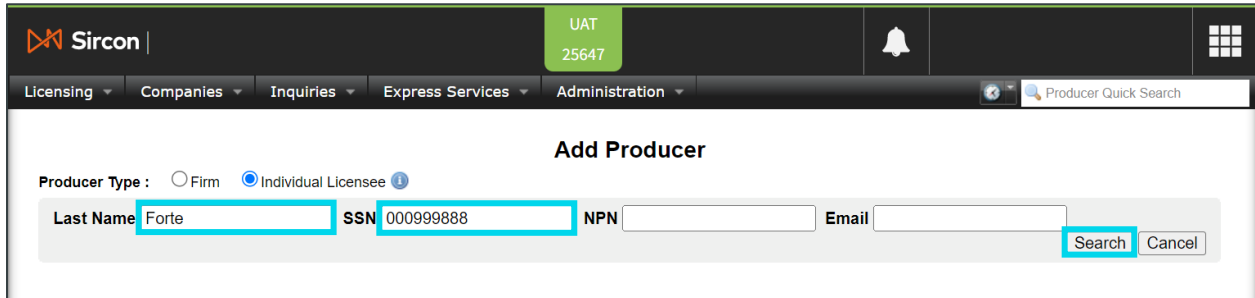
NEXT

OR

Section: Add Producers to your Organization

Manually Add a Producer with an SSN Number

1. If the producer does not have an **NPN** number, you can manually add the producer by entering their **Last Name** and **SSN**.
2. Click **Search**.

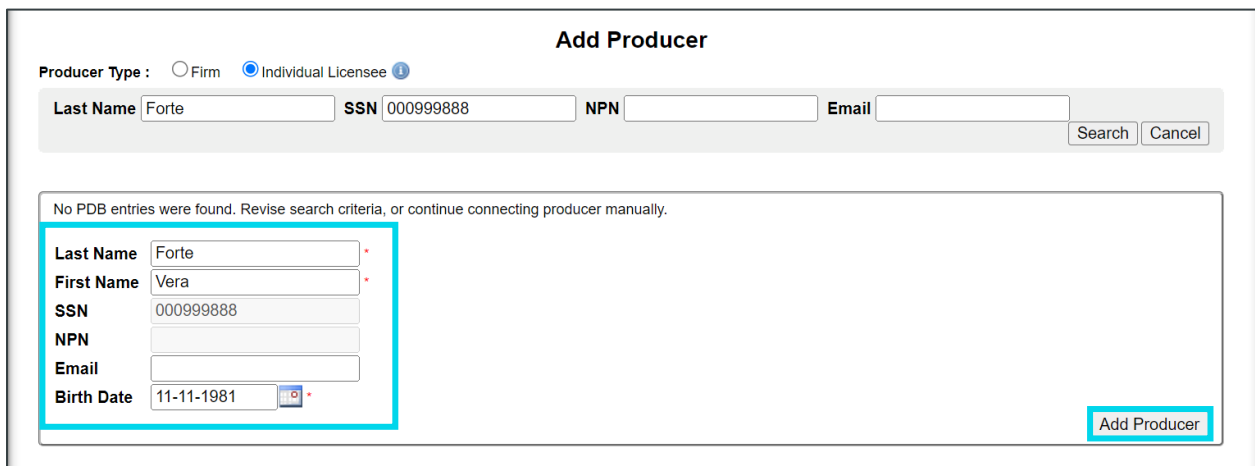


3. You will receive a message that says “No PDB entries were found. Revise search criteria or continue connecting producer manually.”

Note: When you see this message, it means that the producer was not found on the PDB and will not receive PDB updates. Manually creating a record is a viable way to add a producer who may not have an NPN or be licensed yet, but the producer will not receive PDB updates until the individual is found on the PDB.

If the producer should be on the PDB, review the search criteria to make sure the data is accurate.

4. Fill out the producer's **Last Name**, **First Name**, and **Birth Date**. You can also enter their **Email** (this field is optional).
5. Click **Add Producer**.



Section: Add Producers to your Organization

- You will receive a message that the producer is connected to Producer Central.
- Click **Review this producer** to view the producer record or click **Add another producer** to return to the previous screen to add a new producer.

Add Producer

✔ **Vera Forte** has been connected to Producer Manager.

NEXT [Review this producer](#)

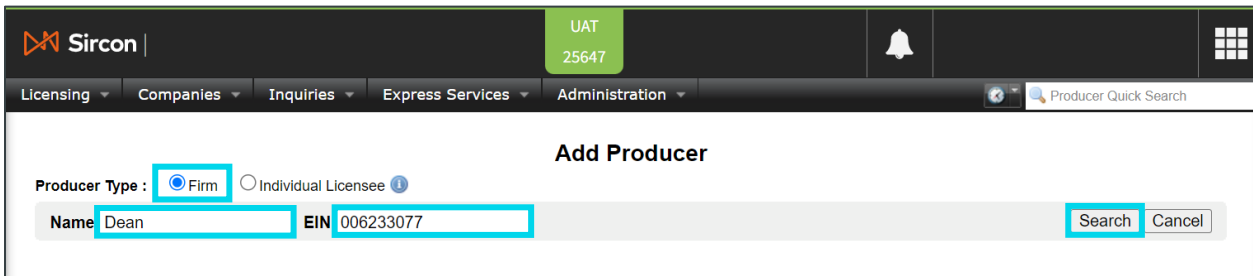
OR [Add another producer](#)

ADD A FIRM

- Select **Firm** from the **Producer Type**.
- Type the **Name** of the firm and the **EIN** number.

Note: You don't need to type the entire firm **Name**. If you enter at least two characters of the name, Producer Central can find the firm.

- Click **Search**.




Add Producer

Producer Type: Firm Individual Licensee ⓘ

Name: EIN:

- Producer Central will compare your search criteria with the information available on the PDB. If a record is found, you will see the details on the screen.
- Click **Add Producer**.



Add Producer

Producer Type: Firm Individual Licensee ⓘ

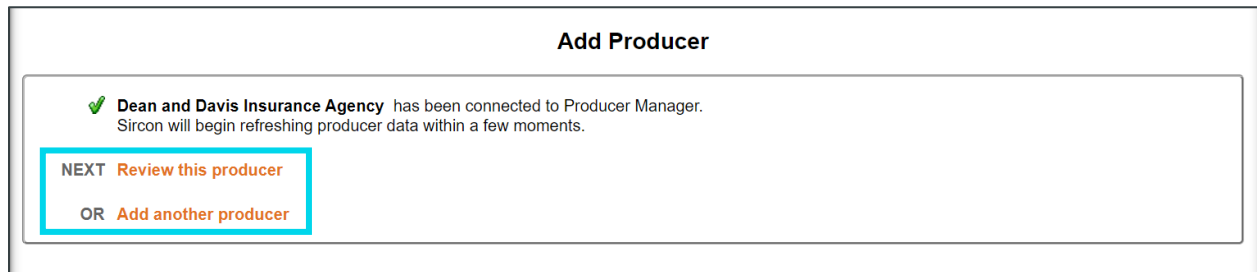
Name: EIN:

1 PDB entry was found:

Name	Resident State	Last Updated
<input checked="" type="radio"/> Dean and Davis Insurance Agency	Pennsylvania	05-17-2023

Section: Add Producers to your Organization

6. You will receive a message that the firm/agency is connected to Producer Central. Sircon will compare data with the PDB and will refresh the producer record daily if it finds changes.
7. Click **Review this producer** to view the producer record or click **Add another producer** to return to the previous screen to add a new producer.

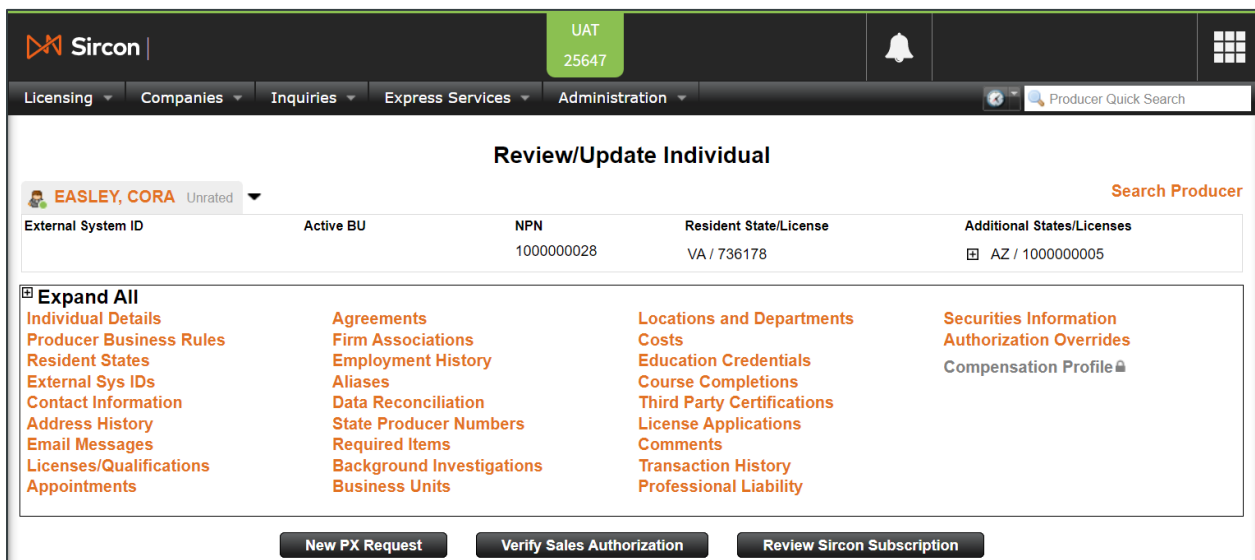


Producer Connections Explained

When a producer is successfully added, their record is connected to your Sircon for Carriers account. If producers have a record in the PDB, they will receive updates from the Daily PDB Sync. Once you add a producer to your organization, you can:

- View their Producer Record
- Search for the Producer
- Add Appointments
- Assign the producer to Business Units and Cost Centers

The image below displays the Producer Record for an individual named Cora Easley. Later in this training, we will take a [Tour of the Producer Record](#).



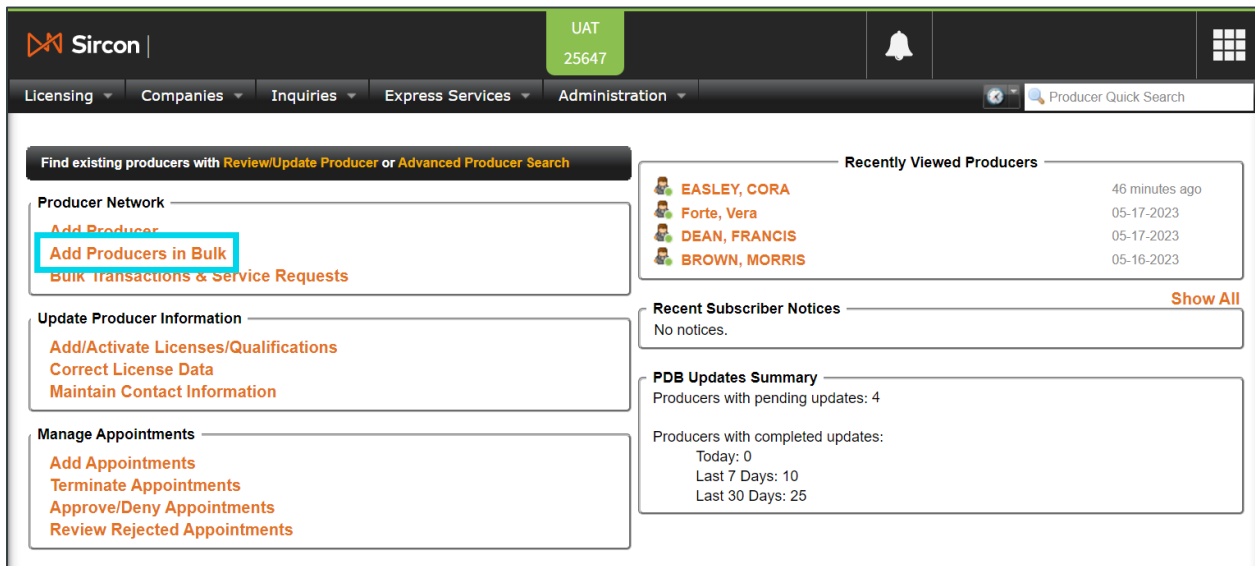
Section: Add Producers to your Organization

Add Multiple Producers in Bulk

At times, you may need to add a batch of producers to your account. You can use this feature during the initial setup of Producer Central or during a merger/acquisition.

On these occasions, you can upload a file to Producer Central containing basic information about the producers you want to add. Producer Central will then check the National Producer Database (PDB) for data on the producers listed in the file. If information matches, it will retrieve the data, and automatically create producer records in Producer Central based on the retrieved information.

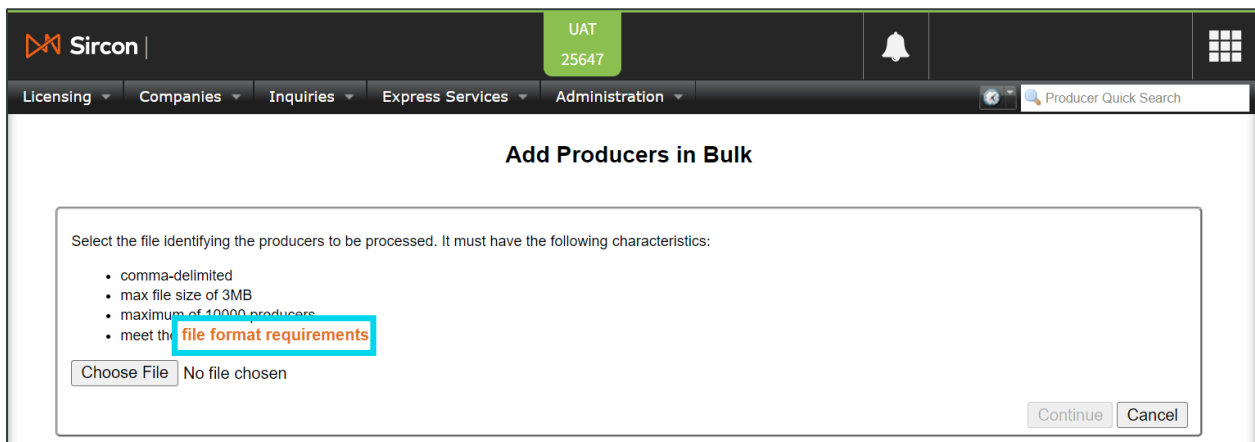
1. Start by clicking the **Add Producers in Bulk** option from the main page.



The screenshot shows the Sircon Producer Central main page. The navigation bar includes 'Licensing', 'Companies', 'Inquiries', 'Express Services', and 'Administration'. The user is logged in as 'UAT 25647'. The main content area is divided into several sections:

- Find existing producers with Review/Update Producer or Advanced Producer Search**
- Producer Network**: Includes 'Add Producer' and 'Add Producers in Bulk' (highlighted with a red box), and 'BULK Transactions & Service Requests'.
- Update Producer Information**: Includes 'Add/Activate Licenses/Qualifications', 'Correct License Data', and 'Maintain Contact Information'.
- Manage Appointments**: Includes 'Add Appointments', 'Terminate Appointments', 'Approve/Deny Appointments', and 'Review Rejected Appointments'.
- Recently Viewed Producers**: Lists producers like EASLEY, CORA (46 minutes ago), Forte, Vera (05-17-2023), DEAN, FRANCIS (05-17-2023), and BROWN, MORRIS (05-16-2023).
- Recent Subscriber Notices**: Shows 'No notices.' with a 'Show All' link.
- PDB Updates Summary**: Shows 'Producers with pending updates: 4' and 'Producers with completed updates: Today: 0, Last 7 Days: 10, Last 30 Days: 25'.

2. To add a batch of producer records to Producer Central, you must create a properly formatted **comma-delimited** (CSV) data file and then upload the file to the system. You can add a maximum of 10,000 producers at one time.
3. Click the **File Format Requirements** to learn how to format the CSV file.



The screenshot shows the 'Add Producers in Bulk' page. The main heading is 'Add Producers in Bulk'. Below it, there is a text box that says 'Select the file identifying the producers to be processed. It must have the following characteristics:' followed by a bulleted list:

- comma-delimited
- max file size of 3MB
- maximum of 10000 producers
- meet the **file format requirements** (highlighted with a red box)

Below the list is a 'Choose File' button and the text 'No file chosen'. At the bottom right, there are 'Continue' and 'Cancel' buttons.

Section: Add Producers to your Organization

4. You can now see the requirements to upload producers in bulk. The **File Instructions** show the required layout of the CSV file.
5. To create the load file, start by creating a spreadsheet using a program like Excel or Google Sheets.
6. The letters A-H represent the column headers in the file.
7. Depending on the **Producer Type**, the required fields will change.

Note: The required fields may also change depending on whether your organization uses SSN numbers or NPN numbers to track producers. This is controlled by the INDV_REQUIRED_IDENTIFIERS business rule set.

File Instructions
Required fields are based on the current configuration.

The following values are accepted (in order):

- A. Producer Type (IL or AGY)
- B. Name (last name or firm name)
- C. TIN
- D. External System ID Type Code
- E. External System ID
- F. Business Unit Short Name
- G. Cost Center Name
- H. National Producer ID (NPN)

* Required Fields

	A	B	C	D	E	F	G	H
1	IL	Smith	123-45-6789	ATJ	123456	BUONE		656565
2	IL	Green						112233
3	AGY	P & J Firm	09-8765432	VEN	AJ3290	BU TWO		

Note: To add records that do not already exist, you must either enter Name and TIN or Name and NPN for all individuals included in the file. For firms, Name and TIN must be provided to add new records. Optionally, you may enter a Business Unit and External System ID information, which will be added to the new record.

INDIVIDUAL LICENSEE REQUIRED FIELDS

If you have the **National Producer ID (or NPN)** number for the individual licensee, the required fields are:

Column	Field Name	Description
A	Producer Type	Use "IL" to indicate individual licensee
B	Name	Type the Last Name of the producer
H	National Producer ID (NPN)	Type the full NPN number of the producer

Note: In the illustration below, we are including a column header as a reference. Column headers **must be deleted** before creating the final CSV file.

Section: Add Producers to your Organization

A	B	C	D	E	F	G	H
Producer Type	Name	TIN (SSN)	External System ID Type Codes	External System ID	Business Unit Short Code	Cost Center Name	NPN
IL	Shelby		DEFAULT	852008	LIFE		1100000028

If you have the **Social Security Number (or SSN)** for the individual licensee, the required fields are:

Column	Field Name	Description
A	Producer Type	Use “IL” to indicate individual licensee
B	Name	Type the Last Name of the producer
C	TIN (Taxpayer ID)	Type the 9-digit SSN of the producer (with or without dashes)

Note: In the illustration below, we are including a column header as a reference. Column headers **must be deleted** before creating the final CSV file.

A	B	C	D	E	F	G	H
Producer Type	Name	TIN (SSN)	External System ID Type Codes	External System ID	Business Unit Short Code	Cost Center Name	NPN
IL	Jones	999111000	DEFAULT	341032	PC		

AGENCY/FIRM REQUIRED FIELDS

The required fields for agencies or firms are:

Column	Field Name	Description
A	Producer Type	Use “AGY” to indicate agency/firm
B	Name	Type the Firm Name
C	TIN (Taxpayer ID)	Type the 9-digit Employer Identification Number or EIN of the firm (with or without dashes).

Note: In the illustration below, we are including a column header as a reference. Column headers **must be deleted** before creating the final CSV file.

A	B	C	D	E	F	G	H
Producer Type	Name	TIN (EIN)	External System ID Type Codes	External System ID	Business Unit Short Code	Cost Center Name	NPN
AGY	Dean and Davis Insurance Agency	00-6233077					

Section: Add Producers to your Organization

OPTIONAL FIELDS

Note: The required fields listed above are mandatory.

It is generally recommended that you **only input the required fields into the file**. All the producer data you add to the file must match the producer record in Producer Central. If any of the fields are inaccurate, the file will fail.

Column	Field Name	Description
D	External System ID Code	<p>Use this field along with the External System ID (Column E) to assign a writing number, producer code, or any other identifier of the producer that corresponds with your company's internal systems.</p> <p>Case sensitive.</p> <p>Value must exactly match an external system type code value that is already configured in Producer Central in the Code Type Indicators.</p>
E	External System ID	<p>Use this field along with External System Type Code (Column D) to assign a writing number, producer code, or any other identifier of the producer in another of your company's internal systems.</p> <p>10 character maximum.</p> <p>* Required only if you are assigning an external system type code to a producer in the field above.</p>
F	Business Unit Short Name	<p>In order to submit transactions for a producer, they need to be assigned to a business unit and cost center. Use this field to associate the producer with a particular business unit.</p> <p>Case sensitive.</p> <p>Must exactly match the short name of a business unit that is already configured in</p>

Section: Add Producers to your Organization

		<p>Producer Central. You can check the list of the business units by following the Administration > Configure System > Maintain Business Unit menu path.</p>
G	Cost Center Name	<p>In order to submit transactions for a producer, they need to be assigned to a business unit and cost center. Use this field to assign the fee to a cost center.</p> <p>Case sensitive.</p> <p>Must exactly match the name of a cost center that is already configured in Producer Central. You can view a list of the cost centers by following the Administration > Configure System > Maintain Business Unit Cost Center menu path.</p>

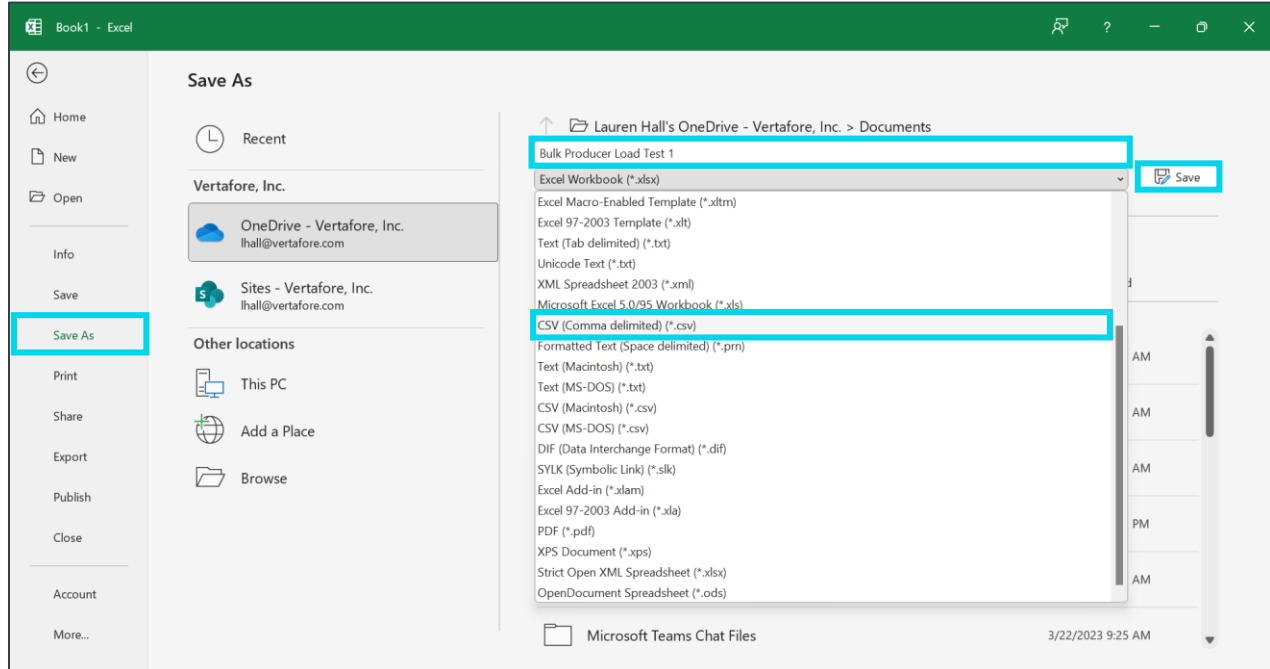
- Add the required information to your spreadsheet. When you are finished, you should have a spreadsheet that looks something like the following illustration:

	A	B	C	D	E	F	G	H
1	AGY	Dean and Davis Insurance Agency	00-6233077					
2	IL	Shelby		DEFAULT	852008	LIFE		1100000028
3	IL	Jones	999111000	DEFAULT	341032	PC		

Note: If you inserted a header row containing the field names to guide your data entry, you must **delete the header** before moving on to the next step.

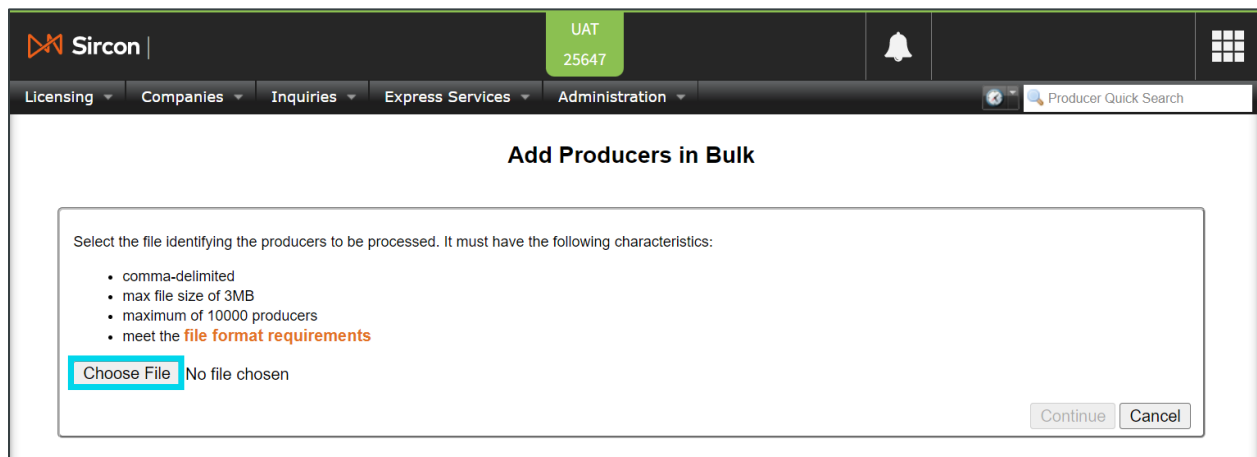
- When you are finished, from the **File** menu, select **Save As**.
- The Save As window will open. From the Save As Type drop-down menu, select **CSV (Comma Delimited) (*.csv)**. In the **File Name** field, enter a name for the producer file.
- Click **Save**.

Section: Add Producers to your Organization



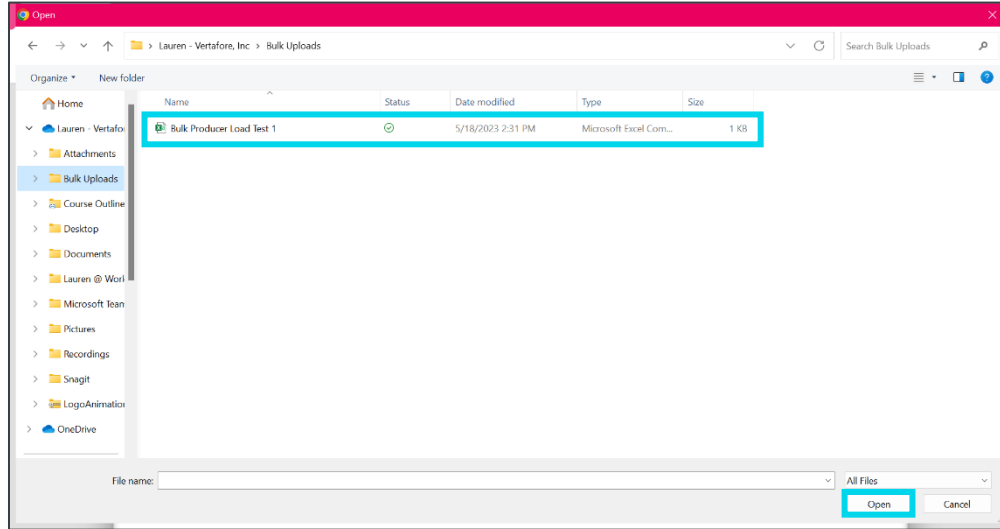
12. Your file is now saved in a comma-separated format and is ready for upload to Producer Central.

13. From the Add Producers in Bulk screen, click the **Choose File** button.



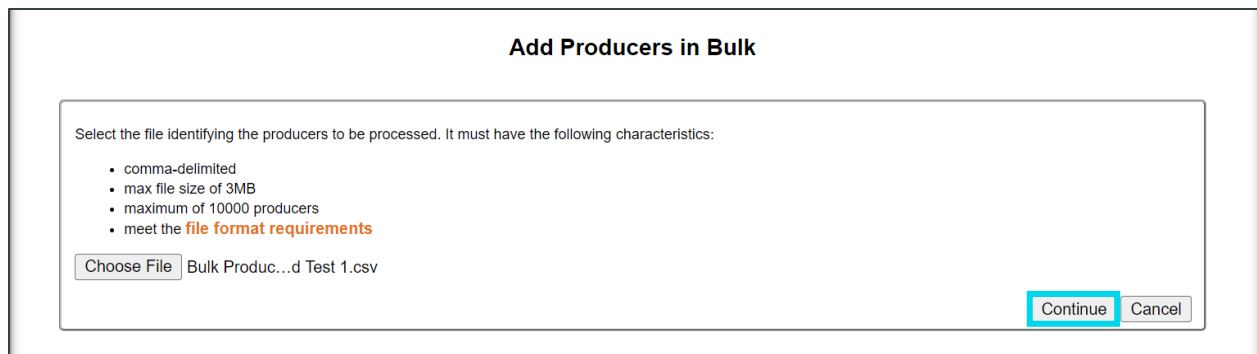
14. Use the navigation options on the **Choose File** dialog box to locate the upload file (*.csv) on your system.

15. When the correct file name appears in the **File Name** field, click the **Open** button.

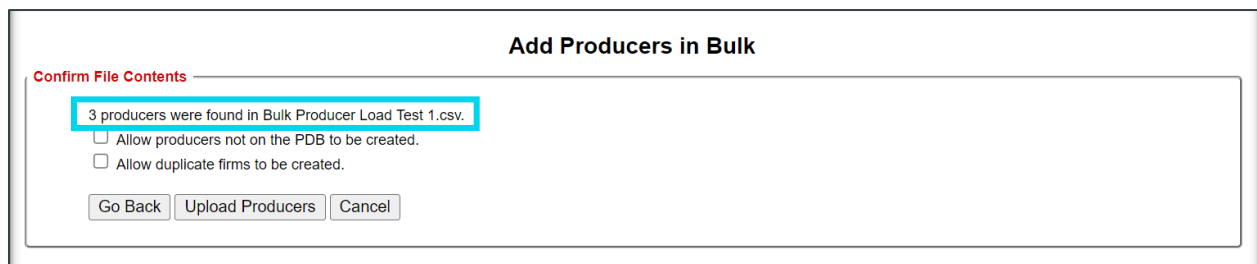
Section: Add Producers to your Organization


16. The file name will appear next to the **Choose File** button.

17. Click **Continue** to submit the file.



18. You will receive a message that says the number of producers found on the spreadsheet.



19. You will also see two checkboxes:

- **Allow producers not on the PDB to be created** – If you select this checkbox, you will create producer records for any producers that were not located on the PDB. It is recommended to leave this option unchecked unless you are loading producers that are yet to be added to the PDB.

Section: Add Producers to your Organization

- **Allow duplicate firms to be created** – If you check this option, you will create multiple duplicate firm producer records. It is recommended that you leave this option unchecked unless you need to perform branch office syncing.

20. Click **Upload Producers** to finish adding the producer records.

Add Producers in Bulk

Confirm File Contents

3 producers were found in Bulk Producer Load Test 1.csv.

Allow producers not on the PDB to be created.

Allow duplicate firms to be created.

21. You will receive a message that the file was loaded into our system. Depending on the size of the file, the amount of time it takes to complete the processing will vary. Click **View current processing status** of this file to see the load status.

Add Producers in Bulk

✔ The file Bulk Producer Load Test 1.csv was loaded into our system. Siron will begin refreshing producer data within a few moments.

NEXT View current processing status of this file.

OR I want to [load another file.](#)

22. You will now see the processing results. If a producer record was created successfully, you will see the name of the Producer is highlighted in **orange**. The **Status** of the item will show **Processed**.

All Reports Recent Reports Add Producers in Bulk

Processing Results

Processing results for the selected producer data source:

Filename	Source	Status	Run Date	Staff Member
Bulk Producer Load Test 1.csv	Bulk Add Producers	Processed	05-18-2023	Lauren Hall

Clear

Filter Criteria

Producer Type Last Name/Firm Name Status

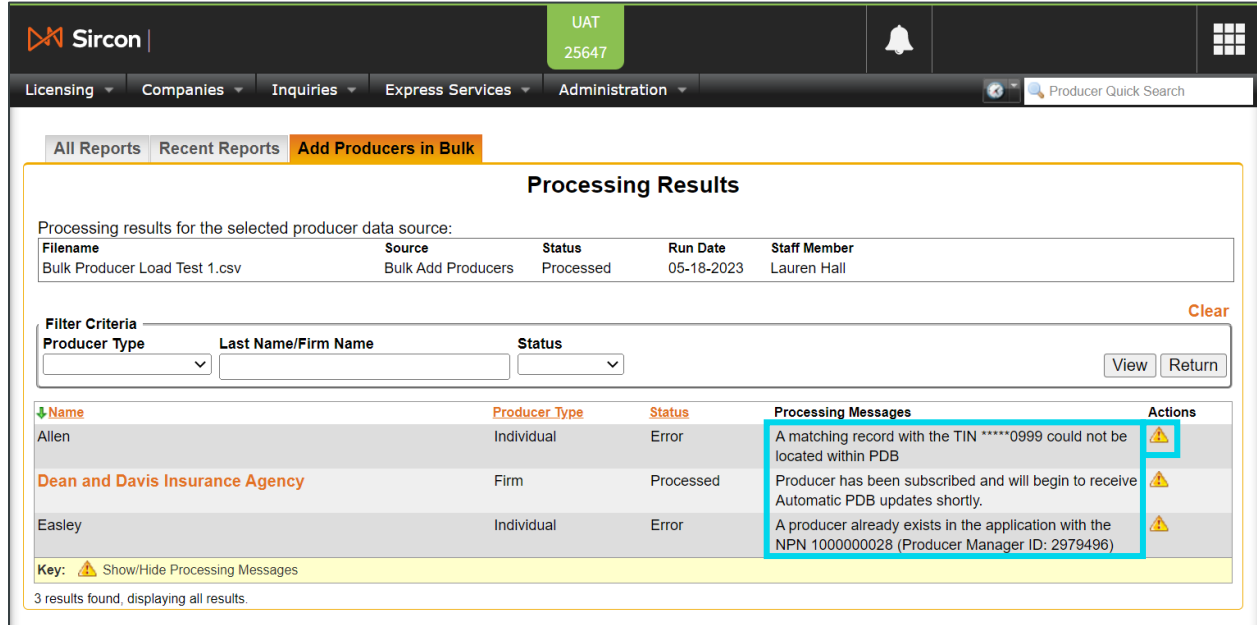
Name	Producer Type	Status	Processing Messages	Actions
Allen	Individual	Error	1 message	⚠
Dean and Davis Insurance Agency	Firm	Processed	1 message	⚠
Easley	Individual	Error	1 message	⚠

Key: ⚠ Show/Hide Processing Messages

3 results found, displaying all results.

23. If any of the producer records failed to load, the **Status** will show **Error**. You can click the **Show Processing Messages** button (⚠) to display a message about why the data load failed.

Section: Add Producers to your Organization






Processing Results


Processing results for the selected producer data source:

Filename	Source	Status	Run Date	Staff Member
Bulk Producer Load Test 1.csv	Bulk Add Producers	Processed	05-18-2023	Lauren Hall

Filter Criteria: Clear

Producer Type: Last Name/Firm Name: Status:
View Return

Name	Producer Type	Status	Processing Messages	Actions
Allen	Individual	Error	A matching record with the TIN *****0999 could not be located within PDB	
Dean and Davis Insurance Agency	Firm	Processed	Producer has been subscribed and will begin to receive Automatic PDB updates shortly.	
Easley	Individual	Error	A producer already exists in the application with the NPN 100000028 (Producer Manager ID: 2979496)	

Key:  Show/Hide Processing Messages

3 results found, displaying all results.

24. Review the Processing Messages to troubleshoot how to resolve each error. In the example above, we received two error messages:

- A matching record for TIN could not be located in within the PDB.
- A producer already exists in the application with the NPN.

25. Review the information submitted and determine if you need to correct any of the data inputted into the application.

Search for Producer Records

Before you can manually modify any producer information in Producer Central, you must first identify the producer record that contains the information you want to work with. This involves searching for the record and then opening either the record itself or a maintenance page that allows you to update the record once it has been identified.

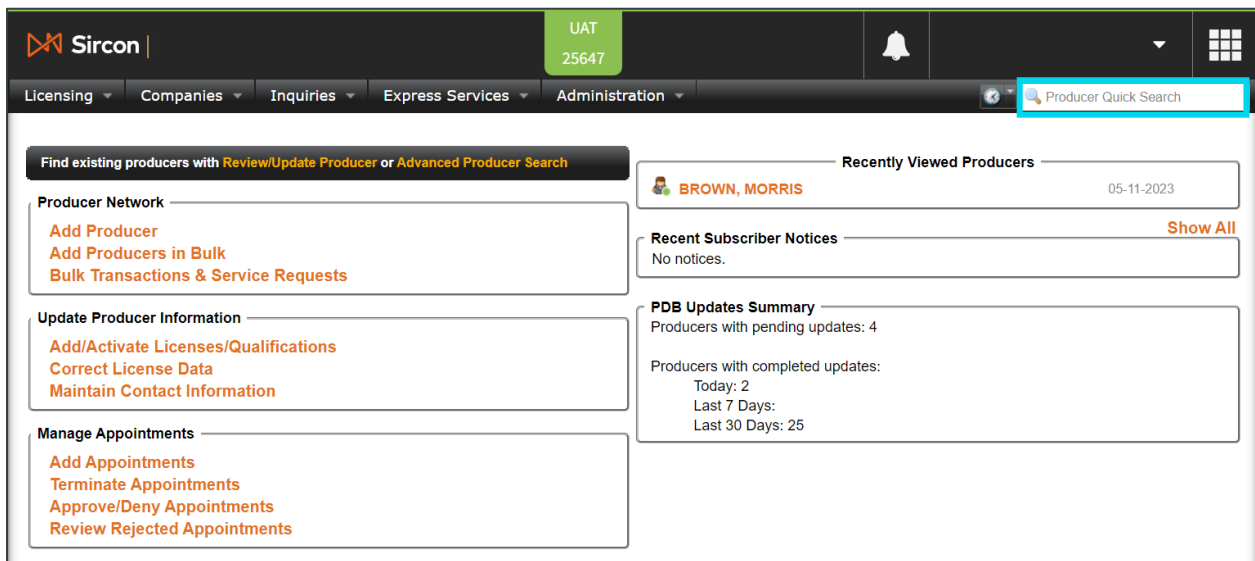
Producer Manager offers the following methods for searching for producer records:

- Classic Producer Quick Search
- Sircon for Carriers Quick Search
- Basic Producer Search
- Advanced Producer Search

Classic Producer Quick Search

Use the **Producer Quick Search** from any page within Producer Central to find a producer record quickly and easily. This functionality allows you to search for producers by their:

- Name
- Alias
- EIN
- Full or partial SSN
- NPN
- License Number
- External System ID

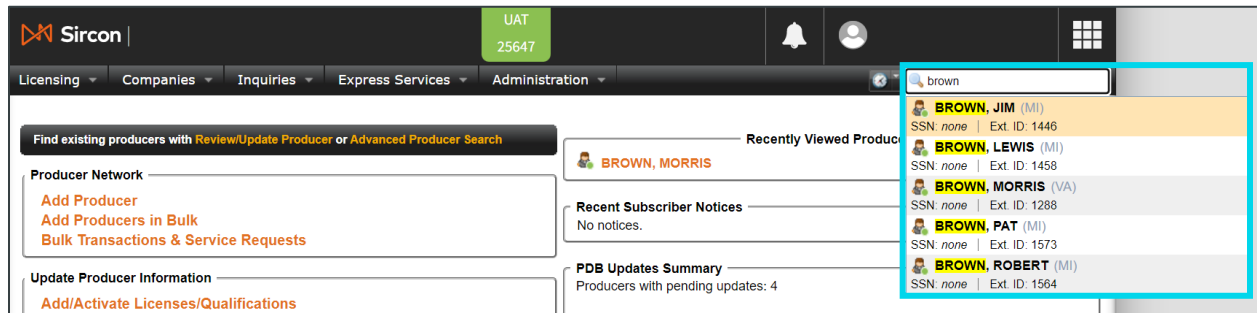


The screenshot shows the Sircon web application interface. At the top, there is a navigation bar with the Sircon logo, a user profile section for 'UAT 25647', and a search bar containing 'Producer Quick Search'. Below the navigation bar, there are several menu items: Licensing, Companies, Inquiries, Express Services, and Administration. The main content area is divided into several sections:

- Find existing producers with Review/Update Producer or Advanced Producer Search**: A section with a dark background and white text.
- Producer Network**: A section with a white background and orange text, containing links for 'Add Producer', 'Add Producers in Bulk', and 'Bulk Transactions & Service Requests'.
- Update Producer Information**: A section with a white background and orange text, containing links for 'Add/Activate Licenses/Qualifications', 'Correct License Data', and 'Maintain Contact Information'.
- Manage Appointments**: A section with a white background and orange text, containing links for 'Add Appointments', 'Terminate Appointments', 'Approve/Deny Appointments', and 'Review Rejected Appointments'.
- Recently Viewed Producers**: A section with a white background and orange text, showing a producer named 'BROWN, MORRIS' with a date of '05-11-2023'.
- Recent Subscriber Notices**: A section with a white background and orange text, showing 'No notices.' and a 'Show All' link.
- PDB Updates Summary**: A section with a white background and orange text, showing 'Producers with pending updates: 4' and 'Producers with completed updates: Today: 2, Last 7 Days: 25, Last 30 Days: 25'.

Section: Search for Producer Records

1. To search for a producer, simply begin typing any of the criteria listed below in the **producer quick search box** found in the upper-right corner of any Producer Central page. You will need to type at least two characters in this field to see results.
2. The list will update itself dynamically as you type. The 10 best matches are displayed in a selectable list.


PRODUCER NAME

You can search by **firm name** (e.g., typing "Ed" will match "Edward Jones, INC") or by **individual name** (Format: Last, First Middle).

When searching for an individual by name, you must type use the **LAST NAME, FIRST NAME** formatting. If a comma is missing between the last name and first name, the search will produce no results. Do not use a comma between first name and middle initial.

Instead of this...	Search for this...
John Smith	Smith, John
O Connell, Holly	O'Connell, Holly
Forte, Vera, E	Forte, Vera E

TIN (TAXPAYER ID NUMBER)

Observe the following guidelines:

- Search by complete **EIN**
- Search by complete **SSN**
- Search by partial **SSN** (last four digits)

Note: If you have masked SSNs turned on in the security role assigned to you, then only the last four digits of the **SSN** will display in the search results.

Section: Search for Producer Records

EXTERNAL SYSTEM ID

Observe the following guidelines:

- Search by exact-match **External System ID**
- Search by **External System ID** without leading zeroes (of the Preferred External System ID Type)

Note: In the search results Producer Central displays the producer's default **External System ID**. This means that if you are searching by an External System ID other than the default ID associated with the producer then the search results displayed may be correct, but may not contain the search criteria you used.

ALIAS

Observe the following guidelines:

- Search by **Individual Alias**
 - Uses the same rules as Individual Name searching
 - The Alias Name will only show up in the search results if that search result was added to the result set due to an Alias search
- Search by **Firm Alias**
 - Uses the same rules as Firm Name searching
 - The Alias Name will only show up in the search results if that search result was added to the result set due to an Alias search

NATIONAL PRODUCER NUMBER (NPN)

Observe the following guidelines:

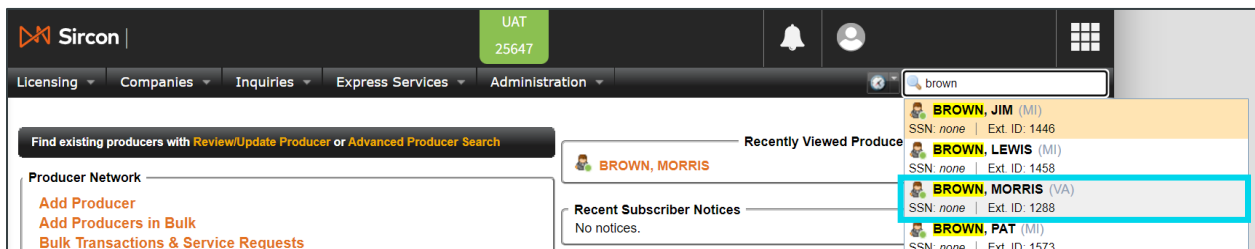
- Search by exact-match **NPN** (firm or individual)

LICENSE NUMBER

Observe the following guidelines:

- Search by exact-match **License Number** (firm or individual)

- Once you have found the producer whose record you wish to view, click that **producer's name** to open up the record in the **Review/Update Producer** page.



The screenshot shows the Vertafore Producer Central interface. At the top, there is a navigation bar with the Sircon logo, a user profile for 'UAT 25647', and a search bar containing 'brown'. Below the navigation bar, there are several sections: 'Find existing producers with Review/Update Producer or Advanced Producer Search', 'Producer Network' (with links for 'Add Producer', 'Add Producers in Bulk', and 'Bulk Transactions & Service Requests'), 'Recently Viewed Producers' (listing 'BROWN, MORRIS'), and 'Recent Subscriber Notices' (showing 'No notices.'). On the right side, a search results dropdown is visible, listing several entries for 'BROWN' with their respective states and SSN/Ext. ID information. The entry 'BROWN, MORRIS (VA)' is highlighted with a blue border.

Section: Search for Producer Records

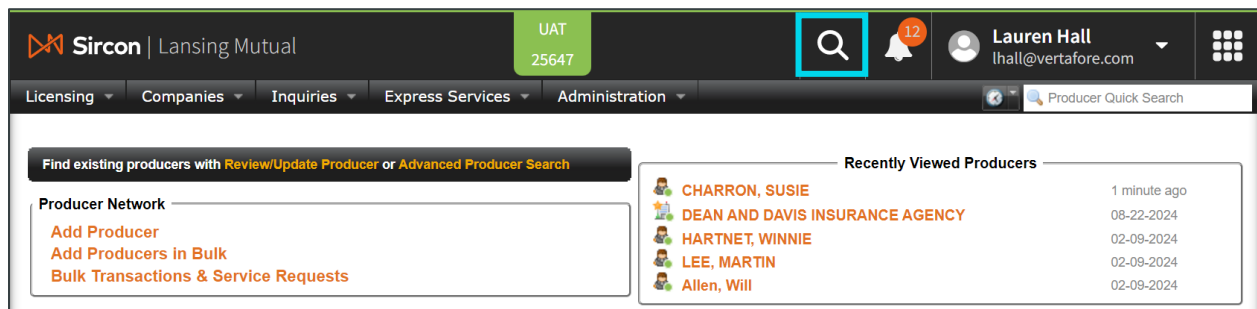
Sircon for Carriers Quick Search

Use the **Sircon for Carriers Quick Search** to locate a producer record from any application in the Sircon for Carriers suite, including:

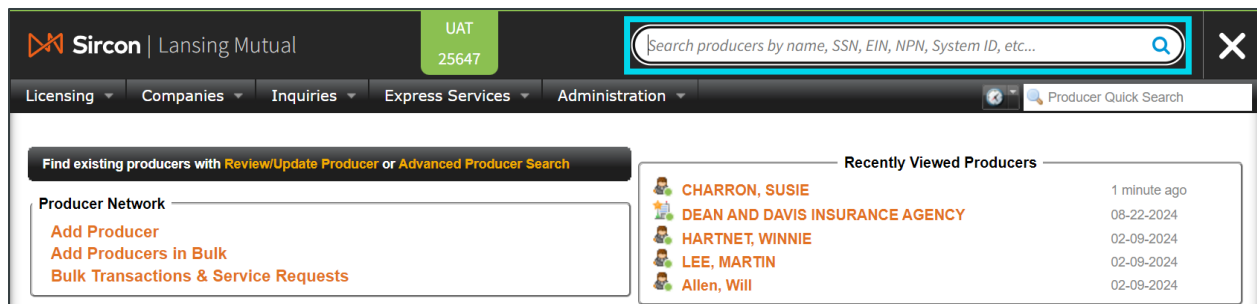
- Producer Administration
- Bulk Transactions & Service Requests
- Compensation
- Sircon Dashboard

To search for a producer across applications, follow the steps below:

1. Click the **Search** button at the top of the menu bar.

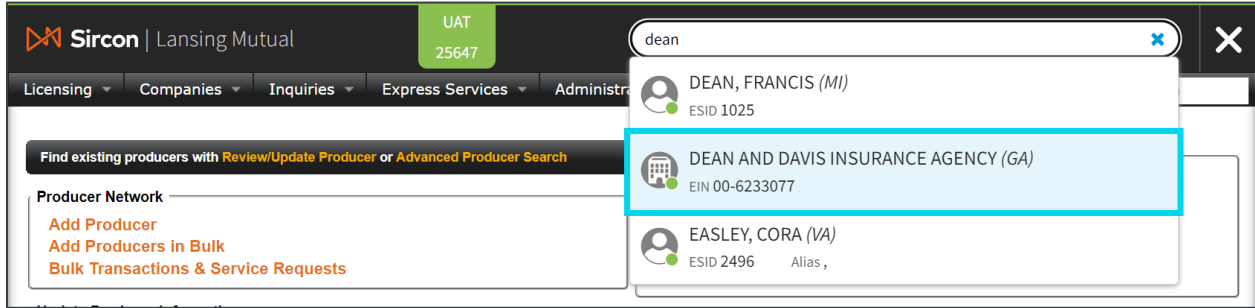


2. You can now see the search box. Type in your search criteria.
3. Like the Producer Quick Search, you can search for a producer using their **Name, Alias, SSN, NPN, EIN, External System ID, or License Number**. Type at least two characters to locate the producer records.

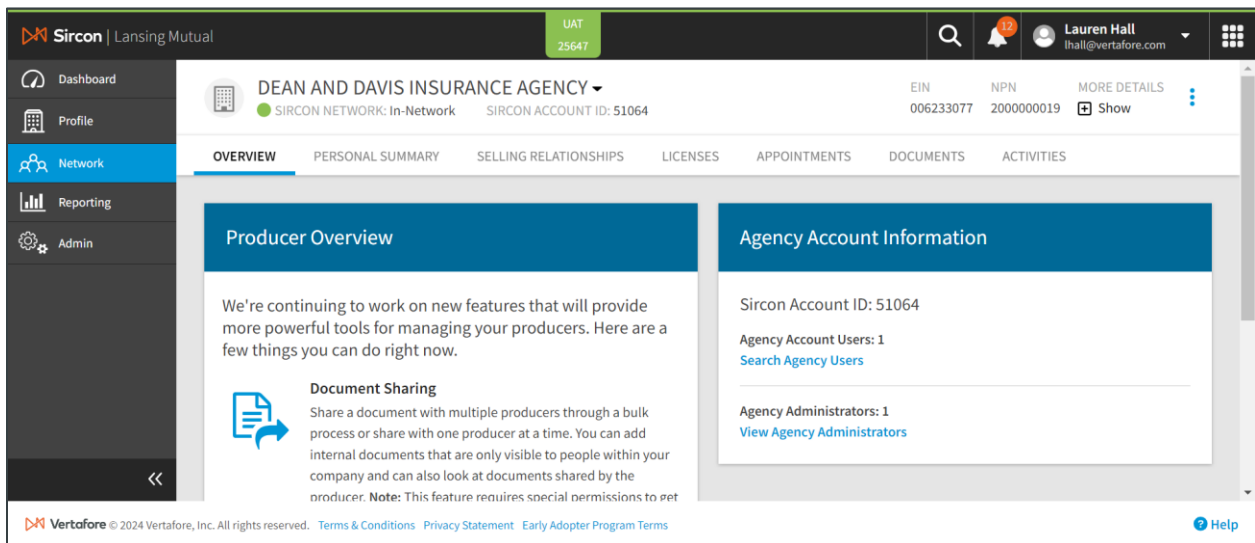


4. You will see a list of producer records that match your search criteria appear in the menu below.
5. Click on the **Producer Name** to view their record.

Section: Search for Producer Records



6. You can now see the producer's record.



Note: When you use the Sircon for Carriers Quick Search, you will see the new Producer Profile in the Sircon Dashboard. To see the classic profile, use the Producer Quick Search feature in Producer Central.

Section: Search for Producer Records

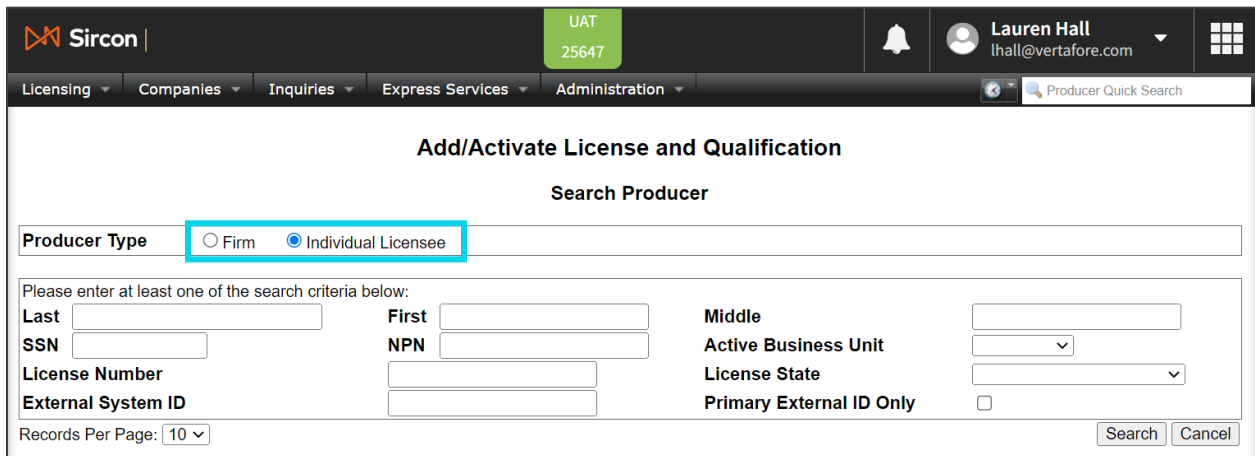
Basic Producer Search

Whenever you need to review or modify information in Producer Central, you must first identify the producer record that contains the information you want to work with.

The **Basic Producer Search** allows you to search for the producer record. After you locate the record, another page allows you to update the record once it has been identified.

In the example below, we are performing a basic producer search to add a license to a producer record.

1. First establish whether you are searching for an individual producer or an agency producer by clicking on either the **Individual Licensee** (the default selection) or **Firm** radio button in the **Producer Type** field.



The screenshot shows the 'Add/Activate License and Qualification' page in the Vertafore system. The 'Search Producer' section is active, and the 'Producer Type' is set to 'Individual Licensee'. Below this, there are several search criteria fields: Last, First, Middle, SSN, NPN, License Number, External System ID, Active Business Unit, License State, and Primary External ID Only. A 'Search' button and a 'Cancel' button are located at the bottom right of the search area. The 'Records Per Page' is set to 10.

SEARCH FOR AN INDIVIDUAL LICENSEE

2. You will see several search fields where you can enter different criteria. Examples of search fields under the **Individual Licensee** are:

- **Last Name**
- **First Name**
- **Middle Initial**
- **SSN**
- **NPN**
- **License Number**
- **External System ID**

Section: Search for Producer Records

Search Producer

Producer Type Firm Individual Licensee

Please enter at least one of the search criteria below:

Last <input type="text"/>	First <input type="text"/>	Middle <input type="text"/>	
SSN <input type="text"/>	NPN <input type="text"/>	Active Business Unit <input type="text"/>	<input type="text"/>
License Number <input type="text"/>	<input type="text"/>	License State <input type="text"/>	<input type="text"/>
External System ID <input type="text"/>	<input type="text"/>	Primary External ID Only <input type="checkbox"/>	

Records Per Page: Search Cancel

3. The remaining fields are dropdown menus from which you can select menu choices. Use the dropdown menu selection in combination with other search criteria to further narrow down your search. Examples of dropdown fields are:

- **License State**
- **Active Business Unit**

Note: Business Unit cannot be the only search criteria entered for a search. You can, however, search for all producers in a given state using the **License State** dropdown.

Search Producer

Producer Type Firm Individual Licensee

Please enter at least one of the search criteria below:

Last <input type="text"/>	First <input type="text"/>	Middle <input type="text"/>	
SSN <input type="text"/>	NPN <input type="text"/>	Active Business Unit <input type="text"/>	<input type="text"/>
License Number <input type="text"/>	<input type="text"/>	License State <input type="text"/>	<input type="text"/>
External System ID <input type="text"/>	<input type="text"/>	Primary External ID Only <input type="checkbox"/>	

Records Per Page: Search Cancel

Note: If you do not make a selection from a dropdown menu field, the system will search based on all of the values in the list.

4. The system will only look for records that match **ALL** your search criteria. To eliminate the possibility of entering incorrect information, we recommend you search for producers using the **NPN** or **SSN** and then leave the other fields blank.

SEARCH FOR A FIRM

5. Examples of search fields under the **Firm** option are:

- **Firm Name**
- **EIN**
- **NPN**
- **License Number**
- **External System ID**

Section: Search for Producer Records

Search Producer

Producer Type Firm Individual Licensee

Please enter at least one of the search criteria below:

Firm Name	<input style="width: 100%;" type="text"/>		
EIN	<input style="width: 150px;" type="text"/>	NPN	<input style="width: 150px;" type="text"/>
License Number	<input style="width: 150px;" type="text"/>		Active Business Unit <input type="text" value="v"/>
External System ID	<input style="width: 150px;" type="text"/>		License State <input type="text" value="v"/>
			Primary External ID Only <input type="checkbox"/>

Records Per Page: Search Cancel

3. The remaining fields are dropdown menus which you can use to further narrow down your search. Examples of dropdown fields are:

- **License State**
- **Active Business Unit**

Search Producer

Producer Type Firm Individual Licensee

Please enter at least one of the search criteria below:

Firm Name	<input style="width: 100%;" type="text"/>		
EIN	<input style="width: 150px;" type="text"/>	NPN	<input style="width: 150px;" type="text"/>
License Number	<input style="width: 150px;" type="text"/>		Active Business Unit <input type="text" value="v"/>
External System ID	<input style="width: 150px;" type="text"/>		License State <input type="text" value="v"/>
			Primary External ID Only <input type="checkbox"/>

Records Per Page: Search Cancel

4. The system will only look for records that match **ALL** your search criteria. To eliminate the possibility of entering incorrect information, we recommend you search for producers using the **EIN** or **NPN** and then leave the other fields blank.

Search Rules

The following rules apply to a search:

- Enter at least **one search criteria**.
- **SSN** or **EIN** must be 9 digits (hyphens are not necessary)
- To search using **Last Name**, **Firm Name**, or **Company Name**, enter at least two characters in the field.
- Wildcard characters (such as *) are not allowed.
- When the **Producer Type** is **Individual Licensee**, the **Last Name**, **First Name**, and **Middle Name** fields cannot contain numeric or double quotation marks ("").
- Double quotation marks are also invalid when **Producer Type** is **Firm**, but the **Firm Name** field may contain numbers.
- **NPN** (National Producer Number) must be numeric.
- **Business Unit** cannot be the only search criterion.
- The default number of results displayed per page of results is 10. You can elect to view up to 50 results per page by selecting a different value in

Section: Search for Producer Records

increments of 10 from the **Records Per Page** dropdown menu below the search fields.

COMPLETE THE BASIC PRODUCER SEARCH

- Click the **Search** button to execute the search.

Search Producer

Producer Type Firm Individual Licensee

Please enter at least one of the search criteria below:

Last <input type="text" value="Brown"/>	First <input type="text" value="Morris"/>	Middle <input type="text"/>	
SSN <input type="text"/>	NPN <input type="text"/>	Active Business Unit <input type="text"/>	
License Number <input type="text"/>		License State <input type="text"/>	
External System ID <input type="text" value="1288"/>		Primary External ID Only <input type="checkbox"/>	

Records Per Page:

- To return to the Producer Central main page, click the **Cancel** button.

Tip: After performing a search, but prior to the information being retrieved, you can stop the search by pressing the **Esc** key on the keyboard.

SEARCH RESULTS

- If only one record met your search criteria, it will open up right away for your review or updates. However, if multiple records met your search criteria, a list of those records will appear in the **Search Results** section at the bottom of the page.

Search Producer

Producer Type Firm Individual Licensee

Please enter at least one of the search criteria below:

Last <input type="text"/>	First <input type="text"/>	Middle <input type="text"/>	
SSN <input type="text"/>	NPN <input type="text"/>	Active Business Unit <input type="text" value="LIFE"/>	
License Number <input type="text"/>		License State <input type="text" value="Florida"/>	
External System ID <input type="text"/>		Primary External ID Only <input type="checkbox"/>	

Records Per Page:

Displaying 1 - 10 (of 21 matching records) Page 1 of 3

Name ▲	License State/#	NPN	Active BU	City	State
ABEL, ALYSON J	FL W448056	1000000009	LIFE	RICHMOND	VA
BLUMENTHAL, JAMIE	FL 75365	34531060	LIFE	Michigan	MI
BOBEAN, MARGUS	FL FLW448056KP	1000000111	LIFE	Leesburg	VA
BROWN, MORRIS	FL W448056	1000000015	LIFE	Raleigh	NC
CLANCEY, JIM X	FL W448056JXC	1000000174	LIFE	Roanoke	VA
CLARK, MELISSA J	FL FL10U5996	1000000143	LIFE	Lansing	MI
COOK, MATTHEW J	FL W448056	1000000005	LIFE	East Lansing	MI
CUTLER, JEAN J	FL 111111	1000000020	LIFE	RICHMOND	VA
DATSYUK, PAVEL	FL KP843231234	1000000202	LIFE	Clawson	MI
Halfhand, Qhorin	FL E74Y87348	999888870	LIFE	city	AL

Displaying 1 - 10 (of 21 matching records) Page 1 of 3

Go To Page:

Section: Search for Producer Records

- The system displays every record that matches all of the search criteria you entered. The number of matching records found shows at the top and bottom of the search results.
- All records matching the search criteria display in the search results, along with values in the following columns: **Name**, **SSN** (or **EIN**), **License State/#**, **NPN**, **City** and **State** for individual and firm records, and **Company Name**, **EIN**, **NAIC ID**, **City**, and **State** for company records.

Note: The expandable **License State/#** column appearing in the search results and maintenance pages lists every state a selected producer is licensed in along with the corresponding license number.

If a producer is licensed in multiple states, click the plus button (+) to view the entire list of license numbers. Click it again to collapse the list.

Note: If a selected producer has more than one active business unit, you can show them all by clicking the plus button (+) in the **Active BU** column.

Displaying 1 - 10 (of 21 matching records)						Page 1 of 3
Name ▲	License State/#	NPN	Active BU	City	State	
ABEL, ALYSON J	FL W448056	1000000009	LIFE	RICHMOND	VA	
BLUMENTHAL, JAMIE	FL 75365	34531060	LIFE	Michigan	MI	
BOBEAN, MARGUS	FL FLW448056KP	1000000111	LIFE	Leesburg	VA	
BROWN, MORRIS	FL W448056	1000000015	LIFE	Raleigh	NC	
CLANCEY, JIM X	FL W448056JXC	1000000174	LIFE	Roanoke	VA	
CLARK, MELISSA J	FL FL10U5996	1000000143	LIFE	Lansing	MI	
COOK, MATTHEW J	FL W448056	1000000005	LIFE	East Lansing	MI	
CUTLER, JEAN J	FL 111111	1000000020	LIFE	RICHMOND	VA	
DATSYUK, PAVEL	FL KP843231234	1000000202	LIFE	Clawson	MI	
Halfhand, Qhorin	FL E74Y87348	999888870	LIFE	city	AL	

Displaying 1 - 10 (of 21 matching records)

Page 1 of 3

Go To Page:

- You must “drill down” to pinpoint the desired producer record. To do so, you can use the following techniques:
 - Click any of the column headings in the **Search Results** to re-sort the records in alphabetical or ascending to descending order.
 - Navigate to a specific page of results by selecting the page from the **Go To Page** dropdown menu and then clicking the **Go** button.
 - Change the number of pages to display in the **Records Per Page** dropdown menu, and then click the Search button again.
 - Enter additional search criteria in the search fields to narrow the search, and then run the search again.

Section: Search for Producer Records

Tip: If you hover your mouse pointer momentarily over a record's value in the **Name** column, you can view information about the record, such as the user who most recently updated the record and the timestamp of its most recent update.

- Once you have located the record you want to work with, click the record's value in the **Name** column. The producer record will open in a new page for review or updating.

Displaying 1 - 10 (of 21 matching records)						Page 1 of 3
Name ▲	License State/#	NPN	Active BU	City	State	
ABEL, ALYSON J	FL W448056	100000009	LIFE	RICHMOND	VA	
BLUMENTHAL, JAMIE	FL 75365	34531060	LIFE	Michigan	MI	
BOBEAN, MARGUS	FL FLW448056KP	1000000111	LIFE	Leesburg	VA	
BROWN, MORRIS	FL W448056	1000000015	LIFE	Raleigh	NC	
CLANCEY, JIM X	FL W448056JXC	1000000174	LIFE	Roanoke	VA	
CLARK, MELISSA J	FL FL10U5996	1000000143	LIFE	Lansing	MI	
COOK, MATTHEW J	FL W448056	1000000005	LIFE	East Lansing	MI	
CUTLER, JEAN J	FL 111111	1000000020	LIFE	RICHMOND	VA	
DATSYUK, PAVEL	FL KP843231234	1000000202	LIFE	Clawson	MI	
Halfhand, Qhorin	FL E74Y87348	999888870	LIFE	city	AL	

Displaying 1 - 10 (of 21 matching records)

Go To Page:

TROUBLESHOOTING BASIC PRODUCER SEARCHES

If **Search Results** do not appear, one of the following is likely:

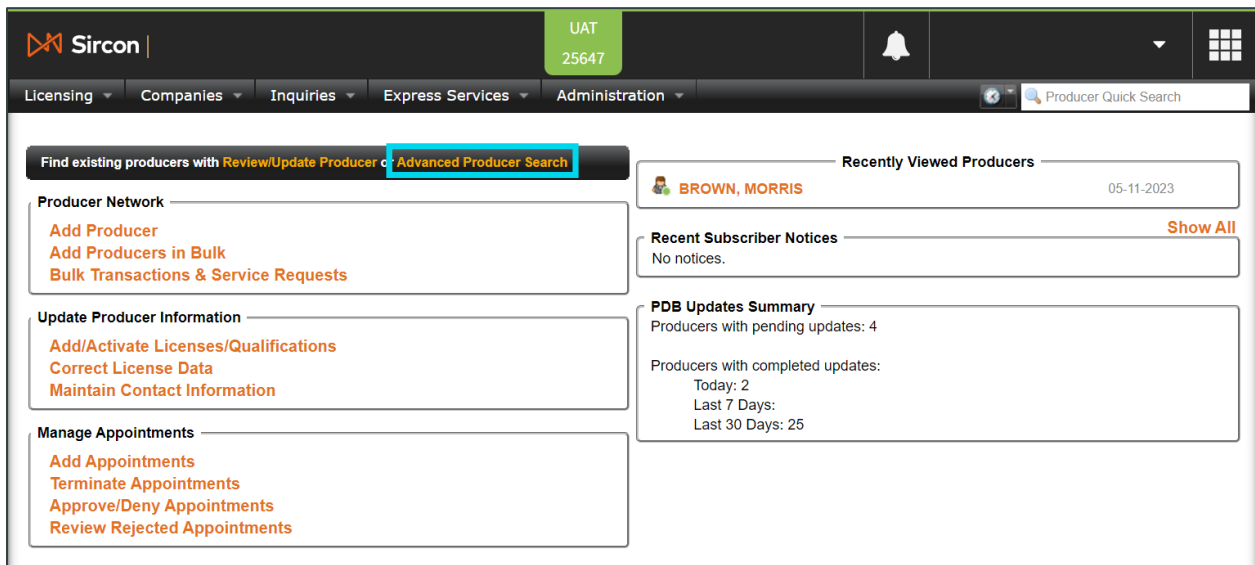
- If no match exists for the search criteria entered, the following message is returned:
 - “No Producer found matching the criteria.”
- If only one matching record is retrieved, the record will be open automatically thus skipping the Search Results.
- Messages in red letters appear when search criteria are invalid. When this happens, re-enter the information to fix the error in the message.

Section: Search for Producer Records

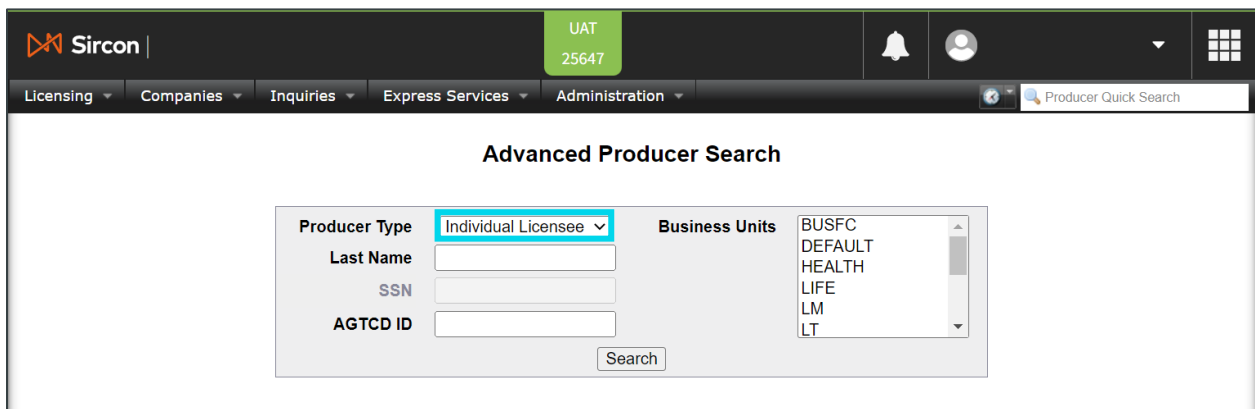
Advanced Producer Search

With the **Advanced Producer Search**, you can use a number of criteria (such as the **Producer Type**, **Last Name**, **SSN**, **External System ID**, or **Business Units**) to search for a producer.

1. Start by clicking the **Advanced Producer Search** link in the **Task Links** section of the **Home** page. This will take you directly to the Advanced Producer Search page.



2. On the **Advanced Producer Search** page, start by selecting the **Producer Type** from the dropdown menu. Select **Individual Licensee** to initiate a search for an individual producer record. Or select **Firm** to initiate a search for a firm producer record. The page will refresh to display unique firm producer Search Fields.



Section: Search for Producer Records

INDIVIDUAL LICENSEE

3. Under the **Individual Licensee** field, you can search using the following fields:
 - **Last Name:** To search for producers grouped by last name, enter a search string on individual producer last name. You may use as few as two characters in your search string. Wildcard characters are not allowed. May not contain numeric characters or double quotation marks ("").
 - **SSN:** To search for producers grouped by Social Security Number, enter the entire SSN string. Partial searches are not allowed. Maximum 9 characters without separating hyphens or 11 characters with two separating hyphens.

Note: Your organization may choose to disable the **SSN** search field. If so, you can use other fields to narrow down your search.

- **[PreferredExternalSystemType] ID:** To search for producers grouped by external system ID, enter the entire string value of a producer ID code in your company's preferred external system, including leading zeroes, either active or inactive. Partial searches not allowed. Maximum 50 characters.

Note: The **[PreferredExternalSystemType] ID** field is customizable. The variable in the label of the [PreferredExternalSystemType] ID field displays the external system that your company has chosen as the "preferred" system.

To make this work, your company's preferred external system type must first be configured in the **Code** field of the INTERFC_TYPE_CD Code Group on the **Maintain Codes** page. Then the value of the **Code** field for the preferred external system type must be Vertafore-configured in the PREF_INDV_INTRFC_CD and PREF_ORG_INTRFC_CD business rules.

- **Business Units:** To search for producers grouped by business unit, click to select the short names of one or multiple business units, either active or inactive. Press the CTRL key and click to select multiples.

4. Once you finish filling out the fields, click **Search**.

Advanced Producer Search

Producer Type	Individual Licensee ▾	Business Units	<div style="border: 1px solid black; padding: 2px;"> BUSFC DEFAULT HEALTH LIFE LM LT </div>
Last Name	<input style="width: 90%;" type="text"/>		
SSN	<input style="width: 90%;" type="text"/>		
AGTCD ID	<input style="width: 90%;" type="text"/>		
<input type="button" value="Search"/>			

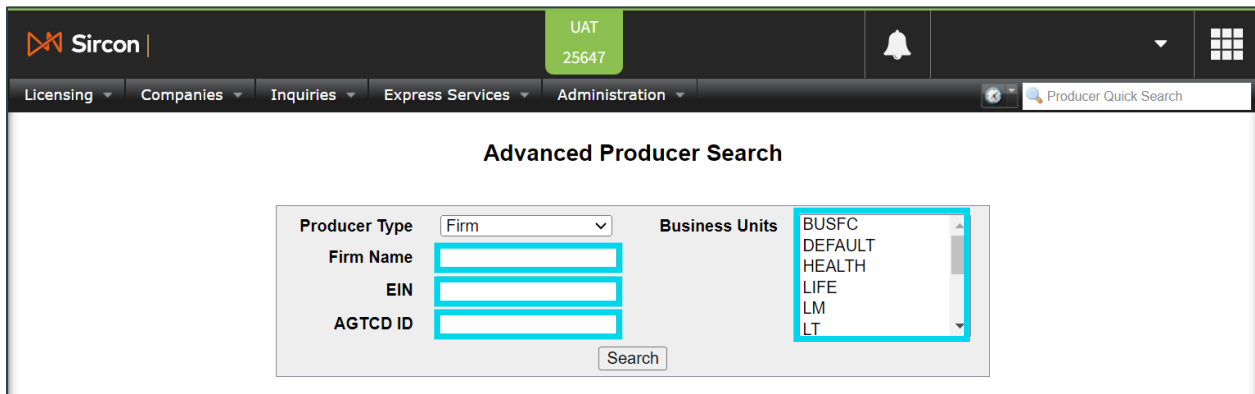
Section: Search for Producer Records

FIRMS

- Under the **Firm** option, you can search using the following fields:
 - EIN:** To search for producers grouped by Federal Employer Identification Number, enter an entire FEIN string. Partial searches not allowed. Maximum 9 characters without a separating hyphen or 10 characters with a separating hyphen.
 - Firm Name:** To search for producers grouped by firm name, enter a search string on firm name. You may use as few as two characters in your search string. May contain numeric characters. Wildcard characters are not allowed. May not contain double quotation marks ("").
 - [PreferredExternalSystemType] ID:** To search for producers grouped by the external system ID, enter the entire string value of a producer ID code in your company's preferred external system, including leading zeroes, either active or inactive. Partial searches not allowed. Maximum 50 characters.
 - Business Units:** To search for producers grouped by business unit, click to select the short names of one or multiple business units, either active or inactive. Press the CTRL key and click to select multiples.

Note: Because the system searches for records containing all—not just any—of the search criteria you enter, the more search criteria you enter, the greater the chance that the system won't find the record you are looking for. If you enter valid search criteria in every field except one, the system won't retrieve the record.

- Once you finish filling out the fields, click **Search**.



The screenshot displays the "Advanced Producer Search" interface. At the top, the Sircon logo and navigation menu are visible. The search form includes the following elements:

- Producer Type:** A dropdown menu currently set to "Firm".
- Business Units:** A dropdown menu that is open, showing a list of business unit codes: BUSFC, DEFAULT, HEALTH, LIFE, LM, and LT.
- Firm Name:** An empty text input field.
- EIN:** An empty text input field.
- AGTCD ID:** An empty text input field.
- Search:** A button located at the bottom right of the form.

Section: Search for Producer Records

SEARCH RESULTS








5. The results of your producer search will be listed alphabetically in descending order. The **Search Results** display the following fields:
- **Producer:** A producer name is displayed for each record. Click a desired producer hyperlink to open the producer's record in the Review/Update Producer page.
 - **SSN:** *Individual producers only.* The producer's Social Security Number is displayed if your company maintains this information.
 - **EIN:** *Firm producers only.* The producer's Federal Employer Identification Number is displayed for firms. Click a desired EIN hyperlink to rerun the search to display only producers with the selected Federal Employer Identification Number.
 - **Ext. ID:** The producer's ID code is displayed in your company's preferred external system as an orange hyperlink. Click a desired Ext. ID hyperlink to rerun the search to display only producers with the selected external system ID. Available only if an ID code for your company's preferred external system is recorded for a listed producer.
 - **BU:** The business units, active or inactive, that are associated with the producer are displayed. Click the Expand button (⊕) to display all the business units. Click again to collapse the information. Click a **BU** hyperlink to rerun the search to display only producers associated with the selected business unit. Available only if at least one business unit is recorded for a listed producer.
 - **Status:** For each producer record listed, this field displays a producer's record status: Pending, Active, or Inactive.
 - **Latest Reconciliation:** This field indicates the date on which the system most recently performed an automated data reconciliation on the record, to refresh it against regulatory data. Includes either manual or system-initiated automated data reconciliations. Here is a key of the different messages:
 - **Processed** (✓) indicates the automated data reconciliation is successful
 - **In Progress** (🔄) indicates the reconciliation is still on-going
 - **Error** (⚠) means an error occurred. Click to review the processing message.Click a desired **Latest Reconciliation Date** hyperlink to open the Data Reconciliation Details page to review information about the selected automated data reconciliation operation. Does not display if an automated data reconciliation has never been performed on the producer record.
 - **Latest PX Txn.:** Available only for Producer Express customers. For each producer record listed, this field shows the date on which the most recent Producer Express onboarding or maintenance transaction request was initiated on a producer's behalf.
 - **Processed** (✓) indicates the Producer Express request has processed successfully

Section: Search for Producer Records








- **In Progress** (🔄) indicates the transaction is in Pending or Open status
- **Error** (⚠️) indicates the transaction has been routed to the Producer Express Error Queue
- **Closed** (🛑) means the transaction has been manually stopped

Click a desired **Latest PX Txn.** date hyperlink to open the Producer Express request record for a selected producer. Does not display if a Producer Express onboarding or maintenance transaction request never has been initiated on the producer's behalf.

- **Missing Info:** This field displays whether or not the record currently is deficient of required information (i.e., data fields that have been configured in your company's instance of Producer Central to be required before compliance transactions, such as appointments, can be requested).
 - The presence of the **Missing Information** symbol (🚩) indicates that a producer record currently is missing required information; an absence of such as symbol indicates that the record currently contains all required information.


Producer	Status	Latest Reconciliation	Latest PX Txn.	Missing Info
 CHIN, CHARLIE (CA) Ext. ID: 1690 BU: PC	Pending	✔️ 2023-05-17	🛑 2022-12-20	
 CLARK, MELISSA (VA) Ext. ID: 1863 BU: LIFE	Active	✔️ 2023-04-20	✔️ 2023-04-20	
 COLE, LORETTA Ext. ID: 1917 BU: PC	Pending		🔄 2023-05-17	🚩
 DAVIDSON, ELLEN (VA) Ext. ID: 1736 BU: PC	Pending	✔️ 2023-02-09	🔄 2023-02-09	
 DJORDJEVIC, DRAGAN (VA) Ext. ID: 1396 BU: PC	Pending		⚠️ 2022-08-03	
 ENGELS, BETH Ext. ID: 1609 BU: PC	Pending		🛑 2022-11-16	🚩
 ENGELS, BETH (CT) Ext. ID: 1753 BU: PC	Pending		✔️ 2023-02-17	

6. Click on the name of your desired **Producer**.

Producer	Status	Latest Reconciliation	Latest PX Txn.	Missing Info
 CHIN, CHARLIE (CA) Ext. ID: 1690 BU: PC	Pending	✔️ 2023-05-17	🛑 2022-12-20	
 CLARK, MELISSA (VA) Ext. ID: 1863 BU: LIFE	Active	✔️ 2023-04-20	✔️ 2023-04-20	
 COLE, LORETTA Ext. ID: 1917 BU: PC	Pending		🔄 2023-05-17	🚩
 DAVIDSON, ELLEN (VA) Ext. ID: 1736 BU: PC	Pending	✔️ 2023-02-09	🔄 2023-02-09	
 DJORDJEVIC, DRAGAN (VA) Ext. ID: 1396 BU: PC	Pending		⚠️ 2022-08-03	
 ENGELS, BETH Ext. ID: 1609 BU: PC	Pending		🛑 2022-11-16	🚩
 ENGELS, BETH (CT) Ext. ID: 1753 BU: PC	Pending		✔️ 2023-02-17	


Section: Search for Producer Records

7. The producer's record will open in the **Review/Update Producer** page.



UAT

Licensing ▾ Companies ▾ Inquiries ▾ Express Services ▾ Administration ▾
Producer Quick Search


Review/Update Individual

 **COLE, LORRETTA J** Unrated ▾
Search Producer

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
1917	PC	1000000018	VA / 558987	AZ / 1000000018

 This producer has 1 active service request in Producer Express: 10172634

Expand All

<ul style="list-style-type: none"> Individual Details Producer Business Rules Resident States External Sys IDs Contact Information Address History Email Messages Licenses/Qualifications Appointments 	<ul style="list-style-type: none"> Agreements Firm Associations Employment History Aliases Data Reconciliation State Producer Numbers Required Items Background Investigations Business Units 	<ul style="list-style-type: none"> Locations and Departments Costs Education Credentials Course Completions Third Party Certifications License Applications Comments Transaction History Professional Liability 	<ul style="list-style-type: none"> Securities Information Authorization Overrides Compensation Profile 
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New PX Request
Verify Sales Authorization
Review Sircon Subscription

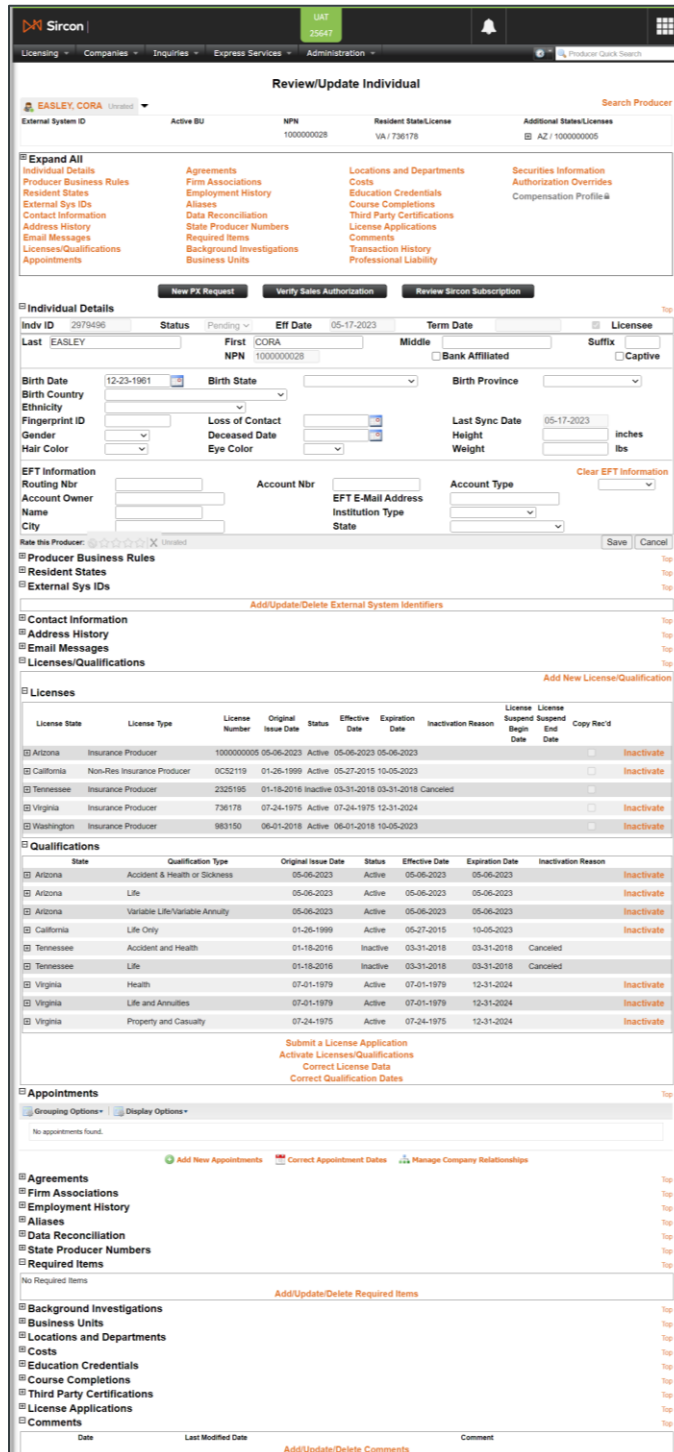
Individual Details Top

Indv ID	2979096	Status	Pending ▾	Eff Date	05-17-2023	Term Date		<input checked="" type="checkbox"/> Licensee
Last	COLE	First	LORRETTA	Middle	J	Suffix		<input type="checkbox"/> Bank Affiliated
		NPN	1000000018					<input type="checkbox"/> Captive

Section: Tour the Producer Record

Tour the Producer Record

Now that we've learned how to create and search for producer records, let's look at a producer record.



Review/Update Individual

External System ID: **EASLEY CORA** | Active BU: **100000028** | Resident State/License: **VA / 736178** | Additional States/Licenses: **AZ / 100000005**

Expand All

- Individual Details
- Producer Business Rules
- Resident States
- External Sys IDs
- Contact Information
- Address History
- Email Messages
- Licenses/Qualifications
- Appointments
- Agreements
- Firm Associations
- Employment History
- Aliases
- Data Reconciliation
- State Producer Numbers
- Required Items
- Background Investigations
- Business Units
- Locations and Departments
- Costs
- Education Credentials
- Course Completions
- Third Party Certifications
- License Applications
- Comments
- Securities Information
- Authorization Overrides
- Compensation Profile #

Individual Details

Indv ID: 2979496 | Status: Pending | Eff Date: 05-17-2023 | Term Date: | Licensee:

Last: EASLEY | First: CORA | Middle: | Suffix: | Bank Affiliated: | Captive:

NPN: 100000028

Birth Date: 12-23-1961 | Birth State: | Birth Province: | Birth Country: | Ethnicity: | Fingerprint ID: | Loss of Contact: | Deceased Date: | Last Sync Date: 05-17-2023 | Height: | Weight: | Hair Color: | Eye Color: | Gender: | Account Nbr: | Account Type: | EFT E-Mail Address: | Institution Type: | City: | State: | Save | Cancel

Licenses

License State	License Type	License Number	Original Issue Date	Status	Effective Date	Expiration Date	Inactivation Reason	License Begin Date	License End Date	Copy Rec'd
Arizona	Insurance Producer	100000005	05-06-2023	Active	05-06-2023	05-06-2023				Inactivate
California	Non-Res Insurance Producer	0052119	01-26-1999	Active	05-27-2015	10-05-2023				Inactivate
Tennessee	Insurance Producer	2325195	01-18-2016	Inactive	03-31-2018	03-31-2018	Canceled			
Virginia	Insurance Producer	736178	07-24-1975	Active	07-24-1975	12-31-2024				Inactivate
Washington	Insurance Producer	983150	06-01-2018	Active	06-01-2018	10-05-2023				Inactivate

Qualifications

State	Qualification Type	Original Issue Date	Status	Effective Date	Expiration Date	Inactivation Reason
Arizona	Accident & Health or Sickness	05-06-2023	Active	05-06-2023	05-06-2023	Inactivate
Arizona	Life	05-06-2023	Active	05-06-2023	05-06-2023	Inactivate
Arizona	Variable Life/Variable Annuity	05-06-2023	Active	05-06-2023	05-06-2023	Inactivate
California	Life Only	01-26-1999	Active	05-27-2015	10-05-2023	Inactivate
Tennessee	Accident and Health	01-18-2016	Inactive	03-31-2018	03-31-2018	Canceled
Tennessee	Life	01-18-2016	Inactive	03-31-2018	03-31-2018	Canceled
Virginia	Health	07-21-1979	Active	07-01-1979	12-31-2024	Inactivate
Virginia	Life and Annuities	07-21-1979	Active	07-01-1979	12-31-2024	Inactivate
Virginia	Property and Casualty	07-24-1975	Active	07-24-1975	12-31-2024	Inactivate

Appointments

No appointments found.

Agreements

- Firm Associations
- Employment History
- Aliases
- Data Reconciliation
- State Producer Numbers
- Required Items
- Background Investigations
- Business Units
- Locations and Departments
- Costs
- Education Credentials
- Course Completions
- Third Party Certifications
- License Applications
- Comments

Section: Tour the Producer Record

Once you have found a producer, the producer's record will display in the **Review/Update Producer** page. This page will contain information relevant to the producer of your choosing. You may find that there are many options on the page to consider and choose from. These options are contained within several different sections based on a variety of criteria.


In descending order, the sections included on the producer record page are as follows:

- Record Summary
- Quick Links
- Data Sections

RECORD SUMMARY



Contains overview information about the entity you are working with, including the:

- Name
- External System ID
- License State(s) and Number(s)
- Active BU (business unit)
- NPN
- Resident State

 EASLEY, CORA Unrated Search Producer			
External System ID	Active BU	NPN	Resident State/License
		1000000028	VA / 736178
		Additional States/Licenses	
		AZ / 1000000005	

QUICK LINKS

Quick Links allow you to navigate rapidly to the information in a particular **Data Section** on the page and the links expand the selection.

 Expand All			
Individual Details	Agreements	Locations and Departments	Securities Information
Producer Business Rules	Firm Associations	Costs	Authorization Overrides
Resident States	Employment History	Education Credentials	Compensation Profile 
External Sys IDs	Aliases	Course Completions	
Contact Information	Data Reconciliation	Third Party Certifications	
Address History	State Producer Numbers	License Applications	
Email Messages	Required Items	Comments	
Licenses/Qualifications	Background Investigations	Transaction History	
Appointments	Business Units	Professional Liability	
New PX Request Verify Sales Authorization Review Sircon Subscription			

For example: You can click the **Comments** link to navigate to and expand the **Comments** section; you can click the **Aliases** link to navigate to and expand the **Aliases** section, etc.

Section: Tour the Producer Record

Use **Quick Links** to navigate more rapidly around the page rather than using the vertical scroll bar.

Note: To expand all **Details Sections**, click the **Expand All** button (⊕), when available, in the Quick Links box. To close all sections, click the **Collapse All** button (⊞).

DATA SECTIONS

Data sections contain a record's essential information. Information is organized in collapsible and expandable panels to which you can navigate from the Quick Links box. (You may also navigate up or down the page using the vertical scrollbar.)

Click the **Top** text link opposite a Data Section name to navigate quickly to the top of the page. **Data Sections** may also offer links to other pages where you can maintain information or perform other related functions.

Individual Details Top			
Indv ID	2979496	Status	Pending ▾
Eff Date	05-17-2023	Term Date	
Last		EASLEY	
First	CORA	Middle	
NPN	1000000028	Bank Affiliated	<input type="checkbox"/>
		Captive	<input type="checkbox"/>
Birth Date	12-23-1961	Birth State	▾
Birth Country	▾	Birth Province	▾
Ethnicity	▾		
Fingerprint ID		Loss of Contact	<input type="checkbox"/>
Gender	▾	Deceased Date	<input type="checkbox"/>
Hair Color	▾	Eye Color	▾
Last Sync Date	05-17-2023	Height	<input type="text"/> inches
		Weight	<input type="text"/> lbs
EFT Information Clear EFT Information			
Routing Nbr	<input type="text"/>	Account Nbr	<input type="text"/>
Account Owner	<input type="text"/>	EFT E-Mail Address	<input type="text"/>
Name	<input type="text"/>	Institution Type	▾
City	<input type="text"/>	State	▾
Rate this Producer: ☆☆☆☆☆ X Unrated Save Cancel			

Note: We will cover how to [maintain producer records](#) in the next quick guide.

APPENDIX 1: Sircon for Carriers Help Resources

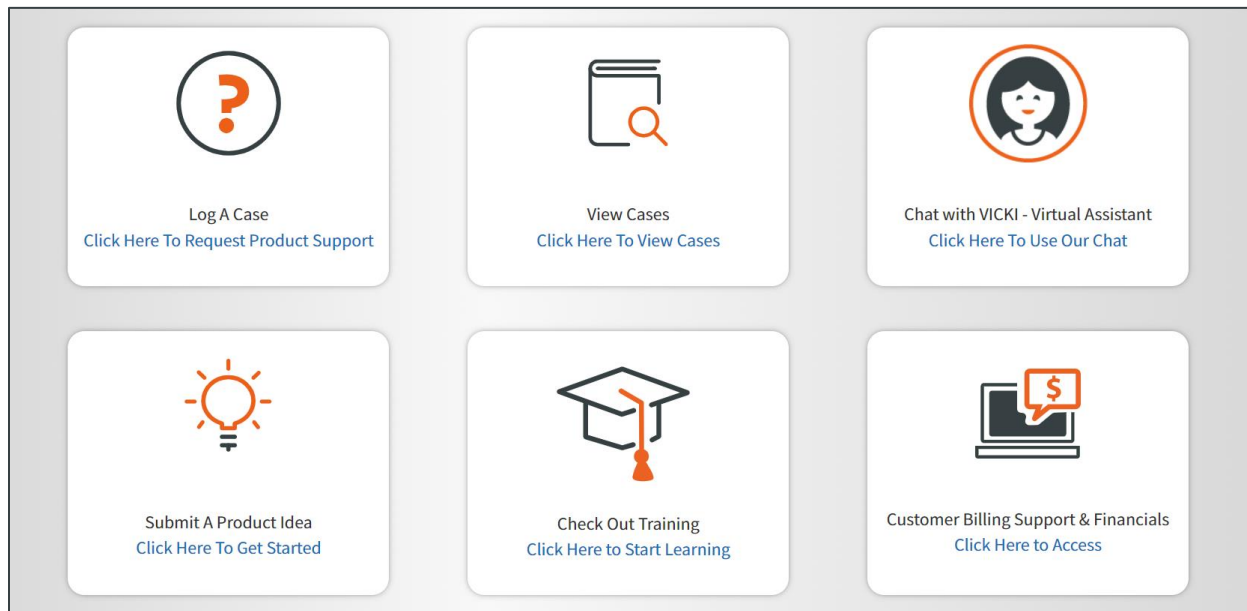
Help is just a click away. Vertafore has two resources available to support you 24/7:

- My Vertafore
- Sircon Support

My Vertafore

My Vertafore is our free online customer support portal and knowledge base. At [My Vertafore](#) you can:

- **Log a Case** – Cases are used to request product support
- **Submit Ideas** – Send Vertafore ideas for new product features or enhancements
- **Search Knowledgebase** – Search for detailed articles on the Sircon Knowledge Base



Note: Sircon does not use the Submit a Product Idea or Chat with VICKI functions.

Contact Vertafore Customer Support

Can't find what you are looking for at My Vertafore? Our Customer Support team is here to help. [Click here to email Support](#) or call 877-876-4430.

Section: APPENDIX 2: Document History

APPENDIX 2: Document History

Version	Revision Date	Revision Record
1.0	6/14/2023	Original Document



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