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# SIRCON FOR CARRIERS

## Producer Central Administration Guide

**Table of Contents**

<b>Overview .....</b>	<b>2</b>
<i>Introduction and Background.....</i>	<i>2</i>
Code Groups .....	2
Code Use Indicators .....	3
<i>What will be covered? .....</i>	<i>4</i>
<i>Who should use this document? .....</i>	<i>4</i>
<i>When should you use this document? .....</i>	<i>4</i>
<b>Maintain Codes.....</b>	<b>5</b>
<i>View Codes Groups .....</i>	<i>5</i>
<i>Add New Codes.....</i>	<i>7</i>
<i>Edit Existing Codes .....</i>	<i>9</i>
<b>Code Use Indicators .....</b>	<b>11</b>
<i>View Code Use Indicators .....</i>	<i>12</i>
Filter Results.....	14
Sort Results .....	16
Page Controls .....	17
<i>Requesting Code Use Indicator Updates .....</i>	<i>18</i>
<b>Sircon Notifications .....</b>	<b>19</b>
<b>APPENDIX 1: Sircon for Carriers Help Resources .....</b>	<b>22</b>
My Vertafore.....	22
Contact Vertafore Customer Support.....	22
<b>APPENDIX 2: Document History.....</b>	<b>23</b>

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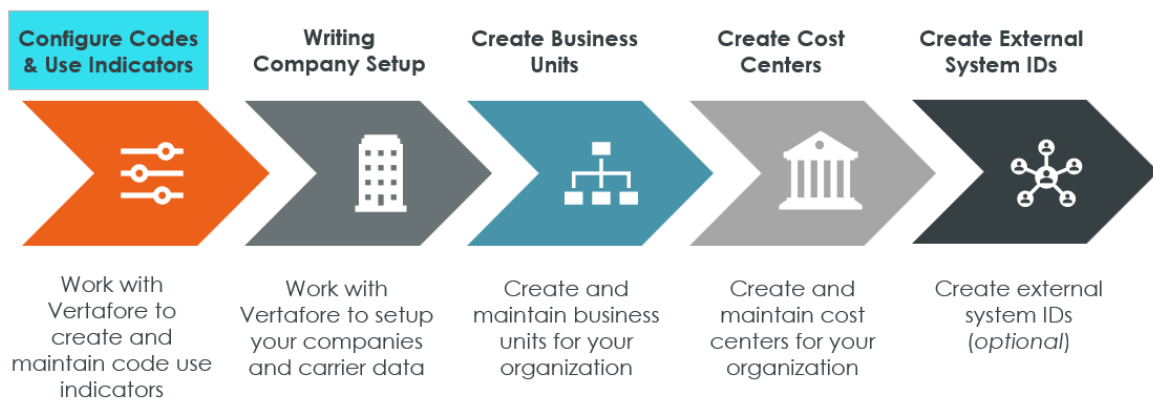
## Overview

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### Introduction and Background

Before you add producers to your organization and set up business units and cost centers, you must first configure codes and code use indicators. In Producer Central, you can configure the system to more closely conform with your organization's business rules or practices.

### Initial Sircon Administration Process



There are two different types of codes:

1. **Code Groups**
2. **Code Use Indicators**

#### CODE GROUPS

Code groups, or code domains, are values that appear in the dropdown menus or combo box fields in Producer Central. Code groups correspond to a particular field in Producer Central, while the actual codes represent the different values that are available within the field.

Producer Central comes with a standard list of Code Groups that are pre-configured with a default list of Code Values. However, you have the option to add or edit existing code values.

One example of a code group is the **Eye Color Code** (EYE\_CLR\_CD). This field is available in the *Review/Update Individual* screen of the producer record. The pre-configured codes are:

- **BLUE** – Blue
- **BRWN** – Brown
- **GRN** – Green
- **HAZL** – Hazel

## Section: Overview

If your organization needs additional codes, for example if you need to add gray eyes as an option, you can add the code GRAY – Gray to the EYE\_CLR\_CD code.

### CODE USE INDICATORS

**Code use indicators** determine what types of information are visible within Producer Central. Most information that is available in the NAIC's Producer Database (PDB) can be submitted and tracked in Producer Central, including most:

- Insurance license classes
- Major lines
- Limited or specialty lines
- Related appointment types

In the Sircon Platform, all state-specific license classes, lines of authority (LOAs), and appointment types are represented by database codes.

To configure the system to reflect only the licenses, LOAs, and appointments that are important to your company's business, you can enable certain codes for specific states while disabling other codes that are of no concern to your company.

With code configuration in place:

- Only enabled codes representing licenses, LOAs, and appointments will be available for tracking on producer records or for use as filter criteria when running inquiries.
- A user or automated process may submit a license or appointment request only for a type whose code is available and enabled.
- Automated data reconciliations (such as the Daily PDB Syncs) will only update a producer record with information pertaining to a code that is in use in the system; it will ignore data relating to disabled codes.
- A producer sales authorization request will only process for product types that are data mapped to licenses, LOAs, or appointments for which codes are enabled.

Unlike **Code Groups**, the **Code Use Indicators** are configured by the Vertafore support team. However, any user with administrative access can view the current code use indicators and request updates to the Producer Central configuration.

As states change their rules and regulations, Vertafore updates the configuration by adding and disabling code use indicators.

Section: Overview

### **What will be covered?**

In this guide, we will review how to configure your company's iteration of Producer Central using codes.

We will cover how to add new codes values to code groups and display/edit existing code values.

We will also learn how to display the code use indicators. We will also learn how to review the Sircon Notification emails to learn about upcoming changes to the code use indicators.

**Note:** Additional quick guides cover the other steps within the Sircon Administration process. Click the links to open the [Writing Company Setup](#) guide, the [Business Units and Cost Centers](#) guide, or the External System ID guide.

### **Who should use this document?**

Users with Producer Central administrator security access that are responsible for configuring codes for their organization.

### **When should you use this document?**

Use this quick guide when you need to learn how to configure codes in Producer Central.

## Maintain Codes

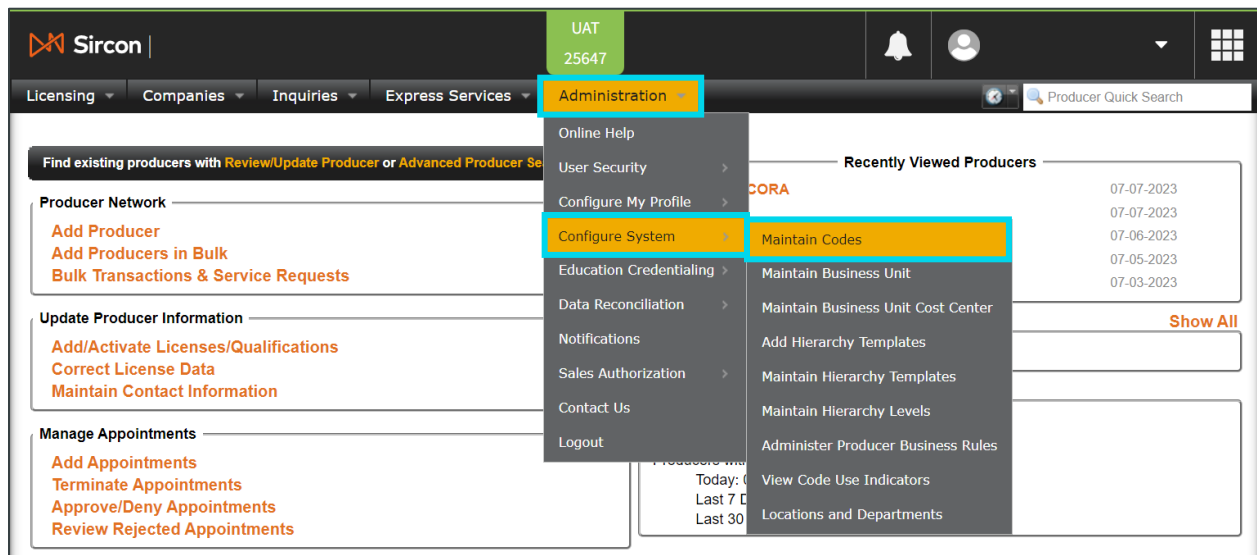
Code groups, or code domains, are customizable fields that contain dropdown menus or combo box selections. Producer Central comes with a standard list of code groups that include standard code values which are preconfigured by Vertafore.

If you have the administrator security role, you can add new code values to code groups and edit existing codes.

### View Codes Groups

In this section, we will learn how to review the current code values within the code groups.

1. From the **Administration** menu, click **Configure System** then click **Maintain Codes**.



2. You will now see the *Maintain Codes* page. The table contains a list of the **Code Groups** and a **Description** of each code group.
3. To display a list of the current code values, click the **Expand** button (⊕) next to the name of the **Code Group**.

Maintain Codes	
Select the Code Group to add a new Code to or modify an existing Code for:	
Code Group	Description
<input type="radio"/> ⊕ ADVANCE_COMMISSION_CD	Advance Commission Code
<input type="radio"/> ⊕ ADVANCE_TRANSACTION_STS_CD	Advance Transaction Status Code
<input type="radio"/> ⊕ AGRMT_PRDCR_ROLE_CD	Agreement Producer Role Code
<input type="radio"/> ⊕ AGRMT_TRMN_RSN_CD	Agreement Termination Reason Code
<input type="radio"/> ⊕ AGRMT_TYPE_CD	Agreement Type Code
<input checked="" type="radio"/> ⊕ AGY_TYPE_CD	Firm Type Code
<input type="radio"/> ⊕ APPL_LOC_CD	Application Location Code
<input type="radio"/> ⊕ APPT_SBST_LTR_ST_CD	Appointment Substitute Letter State Code

## Section: Maintain Codes

4. You will now see a list of the code values that are available in the **Code Group**. Here are the fields included in the menu:
  - **Code:** Displays the short alphanumeric code value.
  - **Short Description:** Displays a short description of the code.
  - **Status:** Displays the status of the code, either **Active** or **Historical**. A code with a Historical status cannot be used but remains in the system for record-keeping or audit purposes.
  - **Begin Date:** Displays the date on which the code was added to the system.
  - **End Date:** If the code is historical, it displays the date on which the code was inactivated.
  - **System Required:** The checkbox indicates the system requires the code to remain active. A checkmark indicates that the code cannot be inactivated.
  - **Long Description:** Displays a long description of the code.
  - **Comment:** Displays associated user comments.

### Maintain Codes

Select the Code Group to add a new Code to or modify an existing Code for:

	Code Group	Description
<input type="radio"/>	<input type="checkbox"/> ADVANCE_COMMISSION_CD	Advance Commission Code
<input type="radio"/>	<input type="checkbox"/> ADVANCE_TRANSACTION_STS_CD	Advance Transaction Status Code
<input type="radio"/>	<input type="checkbox"/> AGRMT_PRDCR_ROLE_CD	Agreement Producer Role Code
<input type="radio"/>	<input type="checkbox"/> AGRMT_TRMN_RSN_CD	Agreement Termination Reason Code
<input type="radio"/>	<input type="checkbox"/> AGRMT_TYPE_CD	Agreement Type Code
<input checked="" type="radio"/>	<input checked="" type="checkbox"/> AGY_TYPE_CD	Firm Type Code
<input type="radio"/>	<input type="checkbox"/> APPL_LOC_CD	Application Location Code
<input type="radio"/>	<input type="checkbox"/> APPT_SBST_LTR_ST_CD	Appointment Substitute Letter State Code
<input type="radio"/>	<input type="checkbox"/> ASSC_AGY_ASSC_CD	Associated Agency Association Code
<input type="radio"/>	<input type="checkbox"/> BD_GROUP_CD	Broker/Dealer groups.
<input type="radio"/>	<input type="checkbox"/> BKGRND_INV_STS_CD	Background Investigation Status Code

Codes							
Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
C	Corporation	Active	09-23-1999		<input type="checkbox"/>	Corporation	
E	Entity	Active	10-09-2003		<input type="checkbox"/>	Entity	
L	Limited Liability Company	Active	09-23-1999		<input type="checkbox"/>	Limited Liability Company	
LP	Limited Liability Partnership	Active	10-25-2001		<input type="checkbox"/>	Limited Liability Partnership	
2	Non-Person	Active	10-25-2001		<input type="checkbox"/>	Non-Person	
P	Partnership	Active	09-23-1999		<input type="checkbox"/>	Partnership	
S	Sole Proprietorship	Active	05-03-2001		<input type="checkbox"/>	Sole Proprietorship	
U	Unincorporated Association	Active	10-25-2001		<input type="checkbox"/>	Unincorporated Association	

**Note:** Click the link to view a full list of the [Code Groups](#) that are available for user-configuration with detailed descriptions.

Section: Maintain Codes

## Add New Codes

In this section we will add new code values to a code group.

1. Click the radio button next to the **Code Group** you need to update.
2. Click the **Next** button at the bottom of the page.

**Maintain Codes**

Select the Code Group to add a new Code to or modify an existing Code for:

	Code Group	Description
<input type="radio"/>	ADVANCE_COMMISSION_CD	Advance Commission Code
<input type="radio"/>	ADVANCE_TRANSACTION_STS_CD	Advance Transaction Status Code
<input type="radio"/>	AGRMT_PRDCR_ROLE_CD	Agreement Producer Role Code
<input type="radio"/>	AGRMT_TRMN_RSN_CD	Agreement Termination Reason Code
<input type="radio"/>	AGRMT_TYPE_CD	Agreement Type Code
<input checked="" type="radio"/>	AGY_TYPE_CD	Firm Type Code
<input type="radio"/>	APPL_LOC_CD	Application Location Code
<input type="radio"/>	APPT_SBST_LTR_ST_CD	Appointment Substitute Letter State Code
<input type="radio"/>	ASSC_AGY_ASSC_CD	Associated Agency Association Code
<input type="radio"/>	BD_GROUP_CD	Broker/Dealer groups.
<input type="radio"/>	BKGRND_INV_TSTS_CD	Background Investigation Status Code
<input type="radio"/>	BKGRND_INV_TYPE_CD	Background Investigation Type Code
<input type="radio"/>	BUSINESS_VIA_DTCC_CD	Conduct Business via DTCC Code
<input type="radio"/>	BU_BUSINESS_SEGMENT_CD	Business Unit Business Segment Code
<input type="radio"/>	BU_DISTRIBUTION_CHANNEL_CD	Business Unit Distribution Channel Code
<input type="radio"/>	BU_SERVICING_LOCATION_CD	Business Unit Servicing Location Code
<input type="radio"/>	CARRIER_RC_INTRFC_TYPE_CD	Carrier and Regulated Company Interface Type Code
<input type="radio"/>	CARRIER_RQST_STS_CD	Carrier Request Status Code
<input type="radio"/>	CARRIER_UNIT_TYPE_CD	Carrier Unit Type Code
<input type="radio"/>	PROD_CAT_CD	Product Category Code
<input type="radio"/>	PROD_CERT_TYPE_CD	Product Certification Type Code
<input type="radio"/>	PROF_DSGNTN_TYPE_CD	Professional Designation Type Code
<input type="radio"/>	PROF_LIAB_EXCL_TYPE_CD	Professional Liability Exclusion Type Code
<input type="radio"/>	PROV_CD	Province Code
<input type="radio"/>	RACE_CD	Race Code
<input type="radio"/>	RC_OWN_CD	Regulated Company Ownership Code
<input type="radio"/>	RC_PRDCR_PAY_CD	Regulated Company Producer Pay Code
<input type="radio"/>	RGLTNG_BDY_CD	Regulating Body Code
<input type="radio"/>	RGLTRY_BDY_CD	Regulatory Body Code
<input type="radio"/>	RQD_ITEM_TYPE_CD	Required Item Type Code
<input type="radio"/>	RSTR_TYPE_CD	Restriction Type Code
<input type="radio"/>	SM_ROLE_CD	Staff Member Role Code
<input type="radio"/>	SUPPRESS_LETTER_TYPE_CD	Suppressible Letter Type Code
<input type="radio"/>	SW_PROD_CD	Software Product Code
<input type="radio"/>	TRMN_VEST_TYPE_CD	Termination Vesting Type Code

3. You will now see the *Maintain Codes* page.
4. Click the **Add a New Code** button.



Section: Maintain Codes

**Maintain Codes**

**Current Code Group**

Code Group	Description
AGY_TYPE_CD	Firm Type Code

**Codes** Add a New Code

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
C	Corporation	Active	09-23-1999		<input type="checkbox"/>	Corporation	<a href="#">Edit</a>
E	Entity	Active	10-09-2003		<input type="checkbox"/>	Entity	<a href="#">Edit</a>
L	Limited Liability Company	Active	09-23-1999		<input type="checkbox"/>	Limited Liability Company	<a href="#">Edit</a>
LP	Limited Liability Partnership	Active	10-25-2001		<input type="checkbox"/>	Limited Liability Partnership	<a href="#">Edit</a>
2	Non-Person	Active	10-25-2001		<input type="checkbox"/>	Non-Person	<a href="#">Edit</a>
P	Partnership	Active	09-23-1999		<input type="checkbox"/>	Partnership	<a href="#">Edit</a>
S	Sole Proprietorship	Active	05-03-2001		<input type="checkbox"/>	Sole Proprietorship	<a href="#">Edit</a>
U	Unincorporated Association	Active	10-25-2001		<input type="checkbox"/>	Unincorporated Association	<a href="#">Edit</a>

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	
<input type="text"/>	<input type="text"/>	Active <input type="text"/>	07-12-2023 <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<a href="#">Clear</a>
<b>Comment</b> <input style="width: 100%;" type="text"/>							
							<input type="button" value="Previous"/> <input type="button" value="Save"/> <input type="button" value="Return"/>

5. In the *Add/Update Codes* section, enter the **Code**, **Short Description**, then chose **Active** in the **Status** field.
6. Enter the **Begin Date**, then type the **Long Description** of the code.
7. Click **Save**.

**Maintain Codes**

**Current Code Group**

Code Group	Description
AGY_TYPE_CD	Firm Type Code

**Codes** Add a New Code

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
C	Corporation	Active	09-23-1999		<input type="checkbox"/>	Corporation	<a href="#">Edit</a>
E	Entity	Active	10-09-2003		<input type="checkbox"/>	Entity	<a href="#">Edit</a>
L	Limited Liability Company	Active	09-23-1999		<input type="checkbox"/>	Limited Liability Company	<a href="#">Edit</a>
LP	Limited Liability Partnership	Active	10-25-2001		<input type="checkbox"/>	Limited Liability Partnership	<a href="#">Edit</a>
2	Non-Person	Active	10-25-2001		<input type="checkbox"/>	Non-Person	<a href="#">Edit</a>
P	Partnership	Active	09-23-1999		<input type="checkbox"/>	Partnership	<a href="#">Edit</a>
S	Sole Proprietorship	Active	05-03-2001		<input type="checkbox"/>	Sole Proprietorship	<a href="#">Edit</a>
U	Unincorporated Association	Active	10-25-2001		<input type="checkbox"/>	Unincorporated Association	<a href="#">Edit</a>

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	
F	Franchise	Active <input type="text"/>	07-12-2023 <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	Franchise	<a href="#">Clear</a>
<b>Comment</b> <input style="width: 100%;" type="text"/>							
							<input type="button" value="Previous"/> <input style="border: 2px solid blue;" type="button" value="Save"/> <input type="button" value="Return"/>

Section: Maintain Codes

- The new code will appear on the page and will be available in the dropdown menu of the **Code Group**.

### Maintain Codes

**Current Code Group**

Code Group	Description
AGY_TYPE_CD	Firm Type Code

**Codes** [Add a New Code](#)

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
C	Corporation	Active	09-23-1999		<input type="checkbox"/>	Corporation	<a href="#">Edit</a>
E	Entity	Active	10-09-2003		<input type="checkbox"/>	Entity	<a href="#">Edit</a>
F	Franchise	Active	07-12-2023		<input type="checkbox"/>	Franchise	<a href="#">Edit</a>
L	Limited Liability Company	Active	09-23-1999		<input type="checkbox"/>	Limited Liability Company	<a href="#">Edit</a>
LP	Limited Liability Partnership	Active	10-25-2001		<input type="checkbox"/>	Limited Liability Partnership	<a href="#">Edit</a>
2	Non-Person	Active	10-25-2001		<input type="checkbox"/>	Non-Person	<a href="#">Edit</a>
P	Partnership	Active	09-23-1999		<input type="checkbox"/>	Partnership	<a href="#">Edit</a>
S	Sole Proprietorship	Active	05-03-2001		<input type="checkbox"/>	Sole Proprietorship	<a href="#">Edit</a>
U	Unincorporated Association	Active	10-25-2001		<input type="checkbox"/>	Unincorporated Association	<a href="#">Edit</a>

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	
<input type="text"/>	<input type="text"/>	Active	07-12-2023	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<a href="#">Clear</a>
<b>Comment</b> <input style="width: 100%;" type="text"/>							
<input type="button" value="Previous"/> <input type="button" value="Save"/> <input type="button" value="Return"/>							

## Edit Existing Codes

Follow these steps to edit or inactivate an existing code.

- From the *Maintain Code* page, click the **Edit** button next to the code you need to update.

### Maintain Codes

**Current Code Group**

Code Group	Description
AGY_TYPE_CD	Firm Type Code

**Codes** [Add a New Code](#)

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
C	Corporation	Active	09-23-1999		<input type="checkbox"/>	Corporation	<a href="#">Edit</a>
E	Entity	Active	10-09-2003		<input type="checkbox"/>	Entity	<a href="#">Edit</a>
F	Franchise	Active	07-12-2023		<input type="checkbox"/>	Franchise	<a href="#">Edit</a>
L	Limited Liability Company	Active	09-23-1999		<input type="checkbox"/>	Limited Liability Company	<a href="#">Edit</a>
LP	Limited Liability Partnership	Active	10-25-2001		<input type="checkbox"/>	Limited Liability Partnership	<a href="#">Edit</a>
2	Non-Person	Active	10-25-2001		<input type="checkbox"/>	Non-Person	<a href="#">Edit</a>
P	Partnership	Active	09-23-1999		<input type="checkbox"/>	Partnership	<a href="#">Edit</a>
S	Sole Proprietorship	Active	05-03-2001		<input type="checkbox"/>	Sole Proprietorship	<a href="#">Edit</a>
U	Unincorporated Association	Active	10-25-2001		<input type="checkbox"/>	Unincorporated Association	<a href="#">Edit</a>

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	
<input type="text"/>	<input type="text"/>	Active	07-12-2023	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<a href="#">Clear</a>
<b>Comment</b> <input style="width: 100%;" type="text"/>							
<input type="button" value="Previous"/> <input type="button" value="Save"/> <input type="button" value="Return"/>							

Section: Maintain Codes

2. In the *Add/Update Codes* section, you can update the **Short Description** and **Long Description** of the code.
3. If you want to inactivate the code, you can change the **Status** from **Active** to **Historical** and add a value in the **End Date**.
4. Click **Save**.

### Maintain Codes

**Current Code Group**

Code Group	Description
AGY_TYPE_CD	Firm Type Code

**Codes** Add a New Code

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
C	Corporation	Active	09-23-1999		<input type="checkbox"/>	Corporation	<a href="#">Edit</a>
E	Entity	Active	10-09-2003		<input type="checkbox"/>	Entity	<a href="#">Edit</a>
F	Franchise	Active	07-12-2023		<input type="checkbox"/>	Franchise	<a href="#">Edit</a>
L	Limited Liability Company	Active	09-23-1999		<input type="checkbox"/>	Limited Liability Company	<a href="#">Edit</a>
LP	Limited Liability Partnership	Active	10-25-2001		<input type="checkbox"/>	Limited Liability Partnership	<a href="#">Edit</a>
2	Non-Person	Active	10-25-2001		<input type="checkbox"/>	Non-Person	<a href="#">Edit</a>
P	Partnership	Active	09-23-1999		<input type="checkbox"/>	Partnership	<a href="#">Edit</a>
S	Sole Proprietorship	Active	05-03-2001		<input type="checkbox"/>	Sole Proprietorship	<a href="#">Edit</a>
U	Unincorporated Association	Active	10-25-2001		<input type="checkbox"/>	Unincorporated Association	<a href="#">Edit</a>

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	
2	Non-Person	Historical	10-25-2001	07-12-2023	<input type="checkbox"/>	Non-Person	<a href="#">Clear</a>

Comment:

5. The updated code status will appear in the list.

### Maintain Codes

**Current Code Group**

Code Group	Description
AGY_TYPE_CD	Firm Type Code

**Codes** Add a New Code

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
C	Corporation	Active	09-23-1999		<input type="checkbox"/>	Corporation	<a href="#">Edit</a>
E	Entity	Active	10-09-2003		<input type="checkbox"/>	Entity	<a href="#">Edit</a>
F	Franchise	Active	07-12-2023		<input type="checkbox"/>	Franchise	<a href="#">Edit</a>
L	Limited Liability Company	Active	09-23-1999		<input type="checkbox"/>	Limited Liability Company	<a href="#">Edit</a>
LP	Limited Liability Partnership	Active	10-25-2001		<input type="checkbox"/>	Limited Liability Partnership	<a href="#">Edit</a>
2	Non-Person	Historical	10-25-2001	07-12-2023	<input type="checkbox"/>	Non-Person	<a href="#">Edit</a>
P	Partnership	Active	09-23-1999		<input type="checkbox"/>	Partnership	<a href="#">Edit</a>
S	Sole Proprietorship	Active	05-03-2001		<input type="checkbox"/>	Sole Proprietorship	<a href="#">Edit</a>
U	Unincorporated Association	Active	10-25-2001		<input type="checkbox"/>	Unincorporated Association	<a href="#">Edit</a>

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	
<input type="text"/>	<input type="text"/>	Active	07-12-2023	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<a href="#">Clear</a>

Comment:

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## Code Use Indicators

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**Code Use Indicators** can configure Producer Central to display only the licenses, lines of authority (LOAs), or appointments that are important to your company's business. The goal of code use indicators is to make the system less confusing and error-prone for users.

Using code use indicators, a life/health/annuities carrier can remove data or restrict transactions related to a property/casualty line of business, or vice versa. Carriers can also restrict other types of data such as:

- License classes (license types)
- License categories (South Carolina only)
- Lines of authority (qualifications)
- Appointment types
- Termination reasons (license, LOA, and appointment)
- Education credential course categories

If all code use indicators are enabled, a producer record in your system would contain all a producer's state license and qualification (LOA) information, instead of being filtered to contain only compliance information that is relevant to your company's business.

Some carriers choose to enable all codes with the "all-on" code use indicator approach because they want a "360-degree view" of their agents' compliance records. However, most carrier customers prefer to limit their view to business-centric compliance information.

You can determine which codes are configured to be either enabled or disabled in your company's specific deployment of Producer Central. You also can activate any codes that are of business interest to your company.

Vertafore support teams will work with you to configure your system. You cannot enable or disable code use indicators yourself. To request a code use indicator to be enabled, you must contact your Vertafore representative.

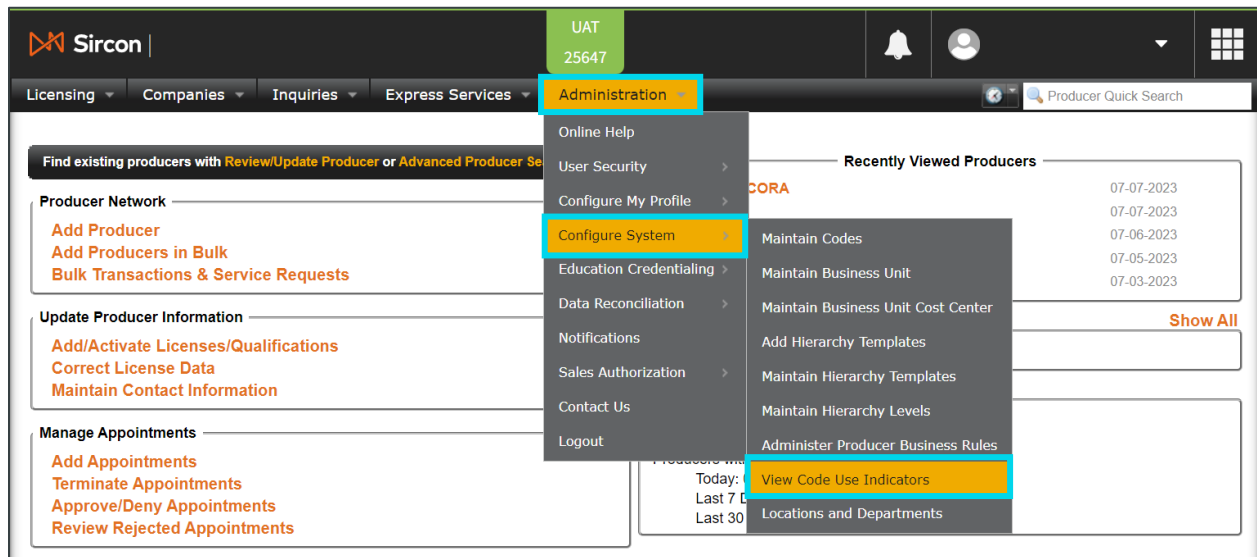
However, you can use the *Code Use Indicators* page to review the codes that are enabled in your company's instance of the Sircon Platform.

Section: Code Use Indicators

## View Code Use Indicators

In this section, we will cover how to display the current configuration of the code use indicators within your organization.

1. From the **Administration** menu select **Configure System**, and then select **View Code Use Indicators**.



2. You will now see the *Code Use Indicators* page.
3. By default, the page will display the active codes that are in the system for all the states. Codes are sorted alphabetically by **Description**.
4. The fields on this page include:
  - **Status:** Displays the current status of the code use indicator. A code added within the past 30 days has a value of **New**; a system-inactivated code has a value of **Historical**. All other codes have no status value.
  - **Begin Date:** The date on which the code became active in the system.
  - **End Date:** The date on which the code was inactivated in the system.
  - **State:** The name of the state that corresponds to the code.
  - **Type:** Displays the code type.
    - Appointment Processing Firm License Category
    - Appointment Processing Individual Licensee License Category
    - Education credentialing course category
    - System Agency License Type
    - System Appointment Termination Reason
    - System Appointment Type
    - System Individual License Type

## Section: Code Use Indicators

- System License Termination Reason
- System Qualification
- System Qualification Termination Reason
- **Code:** Shows the alphanumeric code value.
- **Description:** Displays the long-name description of the code.
- **Code Use Indicator Status:** Displays the status in your company's deployment of the code in Producer Central.
  - The “On” status indicates that the code is currently enabled.
  - The “Off” status indicates that the code is currently disabled.
  - The status of “Pending” indicates that the code has been selected for activation and is pending becoming enabled.

### Code Use Indicators

View a list of current or historical Code Use Indicators.  
Narrow your search with the given filter options below.

**State:**

**Type:**

**Code:**

**Description:**

**Code Use Indicator Status:**

**Begin Date:**  
Date code became available from the state.

All dates

Within the Last Month

Between  and

**Include Historical Codes:**

Show Historical Only

All dates

Made Historical Within the Last Month

Made Historical Between  and

Status	Begin Date	End Date	State	Type	Code	Description	Code Use Indicator Status
	02-12-2016		FL	System Appointment Type Code	1551	0229 Credit	On
	02-23-2018		FL	System Appointment Type Code	360	0234 Limited Surety Agent	On
	02-12-2016		FL	System Appointment Type Code	1620	0929 Non Res Credit	On
	04-29-2016		DE	System Individual License Type Code	645	17B Travel	On
	04-01-2016		DE	System Agency License Type Code	645	17B Travel	On
	06-16-2015		MI	System Individual License Type Code	9094	ADHS NR Adjuster for the Insured	On
	06-16-2015		MI	System Individual License Type Code	9093	ADHS NR Insurance Adjuster	On
	05-08-2001		WA	System Appointment Termination Reason Code	69	Abandonment of Agent/Broker	On
	05-08-2001		NV	System Qualification Termination Reason Code	001	Absent Parent	On
	05-08-2001		TX	System Qualification Termination Reason Code	001	Absent Parent	On
	05-08-2001		UT	System Qualification Termination Reason Code	001	Absent Parent	On
	05-08-2001		CA	System License Termination Reason Code	001	Absent Parent	On
	05-08-2001		NV	System Appointment Termination Reason Code	100	Absent Parent	On
	05-08-2001		TX	System License Termination Reason Code	001	Absent Parent	On
	05-08-2001		TX	System Appointment Termination Reason Code	100	Absent Parent	On
	05-08-2001		CA	System Appointment Termination Reason Code	100	Absent Parent	On
	05-08-2001		CA	System Qualification Termination Reason Code	001	Absent Parent	On
	05-08-2001		NV	System License Termination Reason Code	001	Absent Parent	On
	03-19-2008		WI	Education credentialing course category code	AH1	Accident & Health	On
	03-19-2008		OH	Education credentialing course category code	AH1	Accident & Health	On
	03-19-2008		OK	Education credentialing course category code	AH1	Accident & Health	On
	09-05-2012		OH	System Appointment Type Code	943	Accident & Health - PDP	On
	03-19-2008		UT	Education credentialing course category code	AHADJ	Accident & Health Adjuster	On
	03-19-2008		UT	Education credentialing course category code	AH	Accident & Health including Disability	On
	03-19-2008		GA	Education credentialing course category code	AS	Accident & Sickness	On
	07-09-2009		KY	System Qualification Code	057	Accident and Health	On

6,780 code use indicators found, displaying 1 to 25. [First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

## Section: Code Use Indicators

## FILTER RESULTS

- By default, the *Code Use Indicators* page will display all the active codes in the system. To narrow the results, use the **Filter Options** section at the top of page.

### Code Use Indicators

View a list of current or historical Code Use Indicators.  
Narrow your search with the given filter options below.

**State:**

**Type:**

**Code:**

**Description:**

**Code Use Indicator Status:**

**Begin Date:**  
Date code became available from the state.

All dates

Within the Last Month

Between  and

**Include Historical Codes:**

Show Historical Only

All dates

Made Historical Within the Last Month

Made Historical Between  and

Status	Begin Date	End Date	State	Type	Code	Description	Code Use Indicator Status
	02-12-2016		FL	System Appointment Type Code	1551	0229 Credit	On
	02-23-2018		FL	System Appointment Type Code	360	0234 Limited Surety Agent	On
	02-12-2016		FL	System Appointment Type Code	1620	0929 Non Res Credit	On

- Here are the different filter options that are available:

- **State:** Use the dropdown menu to filter the code by a particular state.
- **Type:** Use the dropdown menu to filter the list by a particular code type (such as System Appointment Termination Reason or System Appointment Type).
- **Code:** Type a code or partial code to filter the Search Results. You may enter as few as one character in this field. The system will filter the Search Results to display codes that begin with the entered value.
- **Description:** Type the code description or a partial code to filter the Search Results. You may enter as few as one character in this field. The system will filter the Search Results to display codes that begin with the entered value.
- **Code Use Indicator Status:** Select a value to filter the Search Results by enabled codes, pending enabled codes, disabled codes, or all codes.

### Code Use Indicators

View a list of current or historical Code Use Indicators.  
Narrow your search with the given filter options below.

**State:**

**Type:**

**Code:**

**Description:**

**Code Use Indicator Status:**

**Begin Date:**  
Date code became available from the state.

All dates

Within the Last Month

Between  and

**Include Historical Codes:**

Show Historical Only

All dates

Made Historical Within the Last Month

Made Historical Between  and

Status	Begin Date	End Date	State	Type	Code	Description	Code Use Indicator Status
	02-12-2016		FL	System Appointment Type Code	1551	0229 Credit	On
	02-23-2018		FL	System Appointment Type Code	360	0234 Limited Surety Agent	On
	02-12-2016		FL	System Appointment Type Code	1620	0929 Non Res Credit	On

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14

## Section: Code Use Indicators

- **Begin Date:** You can filter the Search Results by a date or range of dates on which a code was added to the entirety of codes in the system. Use the following date filters:
  - **All dates:** Click this radio button to ignore date criteria as a filter in the Search Results.
  - **Within the Last Month:** Click this radio button to filter the Search Results to include only codes that were added to the entirety of codes in the system in the past 30 days.
  - **Between [y] and [z]:** Click this radio button to filter the Search Results to include only codes that were added to the entirety of codes in the system within a specified date range, where [y] is the first date in the range and [z] is the last date in the range.

### Code Use Indicators

View a list of current or historical Code Use Indicators.  
Narrow your search with the given filter options below.

State:

Type:

Code:

Description:

Code Use Indicator Status:

**Begin Date:**  
Date code became available from the state.

All dates

Within the Last Month

Between  and

**Include Historical Codes:**

Show Historical Only

All dates

Made Historical Within the Last Month

Made Historical Between  and

Status	Begin Date	End Date	State	Type	Code	Description	Code Use Indicator Status
	02-12-2016		FL	System Appointment Type Code	1551	0229 Credit	On
	02-23-2018		FL	System Appointment Type Code	360	0234 Limited Surety Agent	On
	02-12-2016		FL	System Appointment Type Code	1620	0929 Non Res Credit	On

- **Include Historical Codes:** Click the checkmark to include codes that have been inactivated in the system, usually because of state regulatory changes. An inactive code has a date value in the **End Date** field and a **Status** of **Historical**. You also may filter the Search Results to display codes that were inactivated within the past 30 days or during a specific range of dates.
  - **Show Historical Only:** Click this checkmark to include only codes in the Search Results that have been inactivated in the system.
  - **All Dates:** Click this radio button to display all inactive codes, regardless of inactivation date.
  - **Made Historical Within the Last Month:** Click this radio button to display only codes that were inactivated in the system within the past 30 days.
  - **Made Historical Between[y]and[z]:** Click this radio button to display codes that were inactivated in the system within a specified date range, where [y] is the first date in the range and [z] is the last date in the range.



## Section: Code Use Indicators

### Code Use Indicators

View a list of current or historical Code Use Indicators.  
Narrow your search with the given filter options below.

**State:**

**Type:**

**Code:**

**Description:**

**Code Use Indicator Status:**

**Begin Date:**  
Date code became available from the state.

All dates

Within the Last Month

Between  and

**Include Historical Codes:**

Show Historical Only

All dates

Made Historical Within the Last Month

Made Historical Between  and

Status	Begin Date	End Date	State	Type	Code	Description	Code Use Indicator Status
	02-12-2016		FL	System Appointment Type Code	1551	0229 Credit	On
	02-23-2018		FL	System Appointment Type Code	360	0234 Limited Surety Agent	On
	02-12-2016		FL	System Appointment Type Code	1620	0929 Non Res Credit	On
	04-29-2016		DE	System Individual License Type Code	645	17B Travel	On

3. Once you finish selecting your filters, click **Search**.

### Code Use Indicators

View a list of current or historical Code Use Indicators.  
Narrow your search with the given filter options below.

**State:**

**Type:**

**Code:**

**Description:**

**Code Use Indicator Status:**

**Begin Date:**  
Date code became available from the state.

All dates

Within the Last Month

Between  and

**Include Historical Codes:**

Show Historical Only

All dates

Made Historical Within the Last Month

Made Historical Between  and

Status	Begin Date	End Date	State	Type	Code	Description	Code Use Indicator Status
	02-09-2023		NC	System Agency License Type Code	154	Auto Rental Limited Lines	On
	01-03-2023		OR	System Individual License Type Code	1671	Life Settlement Broker	On
	05-18-2023		MA	System Individual License Type Code	1671	Life Settlement Broker	On
	05-18-2023		MA	System Agency License Type Code	1671	Life Settlement Broker	On
	04-18-2023		CA	System Qualification Code	595	Life Settlement Broker	On

## SORT RESULTS

Use the instructions below to sort and organize your search results.

1. Click a column header to re-sort the table by the selected information category.

**Note:** Click a column heading once to sort the table in ascending order by that category and click it again to re-sort the table in descending order by that category.

## Section: Code Use Indicators

Status	Begin Date	End Date	State	Type	Code	Description	Code Use Indicator Status
	01-03-2023		OR	System Individual License Type Code	1671	Life Settlement Broker	On
	01-09-2023		FL	System Appointment Type Code	1555	Nonres Motor Vehicle Rental 0923	On
	01-17-2023		NE	System Qualification Code	1692	Pet	On
	01-31-2023		UT	System Qualification Code	1692	Pet	On
	01-31-2023		UT	System Appointment Type Code	1406	Pet	On
	02-09-2023		NC	System Agency License Type Code	154	Auto Rental Limited Lines	On
	02-09-2023		SC	System Agency License Type Code	9657	Motor Vehicle Rental Companies	On
	03-17-2023		MO	System Qualification Code	13000	Motor Vehicle Extended Services Contract	On
	04-12-2023		MA	System Qualification Code	8314	Self Service Storage Insurance	On
	04-12-2023		MA	System Agency License Type Code	8314	Self Service Storage Insurance	On

## PAGE CONTROLS

If you have more than one page of search results, use the following page controls to navigate to more results.

- **[x] code use indicators found, displaying [v] to [w]:** Displays the total number of codes in the system, and the range in numbers of codes currently displaying in the section. (Maximum 20 per page.)
- **First/Prev:** Click **First** to open the first page of results; click **Prev** to open the preceding page of results.
- **1, 2, 3, ...:** Click a numeral to open a specific numbered page of results.
- **Next/Last:** Click **Next** to open the succeeding page of results; click **Last** to open the last page of results.

### Code Use Indicators

View a list of current or historical Code Use Indicators.  
Narrow your search with the given filter options below.

**State:**

**Type:**

**Code:**

**Description:**

**Code Use Indicator Status:**

**Begin Date:**  
Date code became available from the state.

All dates

Within the Last Month

Between  and

**Include Historical Codes:**

Show Historical Only

All dates

Made Historical Within the Last Month

Made Historical Between  and

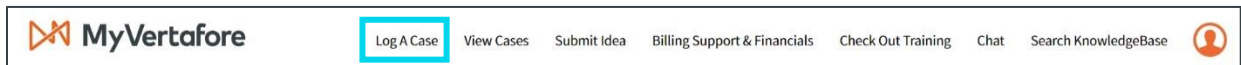
Status	Begin Date	End Date	State	Type	Code	Description	Code Use Indicator Status
	02-12-2016		FL	System Appointment Type Code	1551	0229 Credit	On
	02-23-2018		FL	System Appointment Type Code	360	0234 Limited Surety Agent	On
	02-12-2016		FL	System Appointment Type Code	1620	0929 Non Res Credit	On
	04-29-2016		DE	System Individual License Type Code	645	17B Travel	On
	03-19-2008		WI	Education credentialing course category code	AH1	Accident & Health	On
	03-19-2008		OH	Education credentialing course category code	AH1	Accident & Health	On
	03-19-2008		OK	Education credentialing course category code	AH1	Accident & Health	On
	09-05-2012		OH	System Appointment Type Code	943	Accident & Health - PDP	On
	03-19-2008		UT	Education credentialing course category code	AHADJ	Accident & Health Adjuster	On
	03-19-2008		UT	Education credentialing course category code	AH	Accident & Health including Disability	On
	03-19-2008		GA	Education credentialing course category code	AS	Accident & Sickness	On
	07-09-2009		KY	System Qualification Code	057	Accident and Health	On

6,780 code use indicators found, displaying 1 to 25.

## Requesting Code Use Indicator Updates

If you need to turn on or activate code use indicators for your organization, follow the steps below to send a request to your Vertafore support contact.

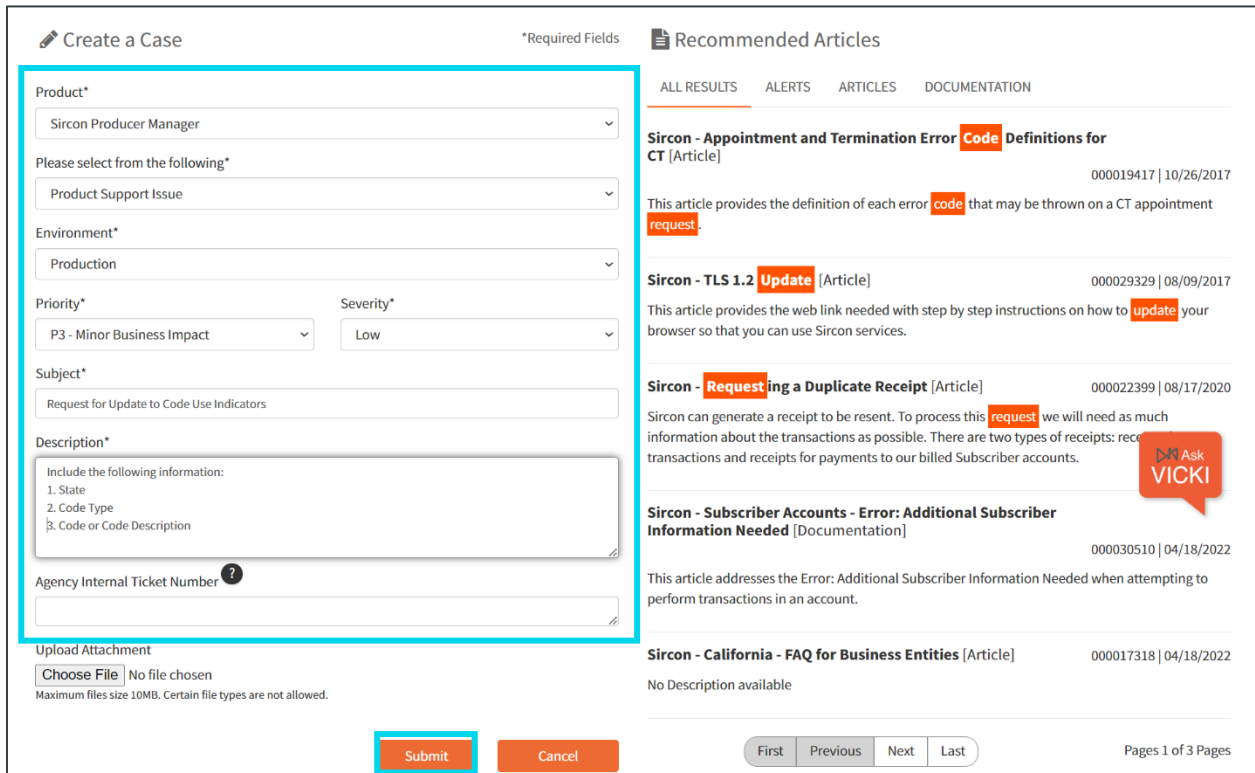
1. Login to the [My Vertafore](#) customer support portal.
2. Click **Log a Case** to create a new case.



3. Include the following information in your case:

- **Product:** Sircon Producer Manager
- **Issue Type:** Product Support Issue
- **Environment:** Production
- **Priority:** P3 – Minor Business Impact
- **Severity:** Low
- **Subject:** Request for Change to Code Use Indicators
- **Description:** Include the **State** (or states) where the code is applicable, the **Code Type**, and the **Code Name** or **Code Description**.

4. Click **Submit**.



**Create a Case** \*Required Fields

**Product\***  
 Sircon Producer Manager

Please select from the following\*  
 Product Support Issue

**Environment\***  
 Production

**Priority\*** P3 - Minor Business Impact **Severity\*** Low

**Subject\***  
 Request for Update to Code Use Indicators

**Description\***  
 Include the following information:  
 1. State  
 2. Code Type  
 3. Code or Code Description

Agency Internal Ticket Number ?

Upload Attachment  
 Choose File No file chosen  
 Maximum files size 10MB. Certain file types are not allowed.

**Submit** **Cancel**

First Previous Next Last Pages 1 of 3 Pages

**Recommended Articles**

ALL RESULTS ALERTS ARTICLES DOCUMENTATION

**Sircon - Appointment and Termination Error Code Definitions for CT** [Article] 000019417 | 10/26/2017  
 This article provides the definition of each error code that may be thrown on a CT appointment request.

**Sircon - TLS 1.2 Update** [Article] 000029329 | 08/09/2017  
 This article provides the web link needed with step by step instructions on how to update your browser so that you can use Sircon services.

**Sircon - Requesting a Duplicate Receipt** [Article] 000022399 | 08/17/2020  
 Sircon can generate a receipt to be resent. To process this request we will need as much information about the transactions as possible. There are two types of receipts: receipts for transactions and receipts for payments to our billed Subscriber accounts.

**Sircon - Subscriber Accounts - Error: Additional Subscriber Information Needed** [Documentation] 000030510 | 04/18/2022  
 This article addresses the Error: Additional Subscriber Information Needed when attempting to perform transactions in an account.

**Sircon - California - FAQ for Business Entities** [Article] 000017318 | 04/18/2022  
 No Description available

**Ask VICKI**


5. The Vertafore support team will receive your request and will update the configuration in Producer Central.

## Sircon Notifications

States frequently inactivate license classes, LOAs, and appointment types, as well as their associated codes, and replace them with new ones. When a code is retired by a state, Vertafore globally makes the code historical in the Sircon Platform and unavailable for future use. However, the code must remain in existence in the system (with a **Code Use Indicator Status** of “On”) to support license, LOA, or appointment history in producer records.

On the other hand, Vertafore does not automatically update your company's configuration of the Sircon Platform to support new or replacement codes. Instead, Vertafore sends all the customers of Producer Manger and Producer Central notifications when there are new code use indicators available in the system.

Vertafore sends customers an email called a “Notice of Code Changes for Producer Manager and Producer Central” whenever code use indicators are added to the system or inactivated.



01/27/2023

**Notice of Code Changes for Producer Manager™ and Producer Central™**

We are updating electronic processing capabilities in Producer Manager and Producer Central to support regulatory changes and electronic processing standards. The updates will assist you in your compliance efforts. Details are listed in the tables below.

**Summary and Customer Action**

Environment	Effective Date	Request By Date
UAT	01/27/2023	As soon as possible
Production	02/10/2023	02/08/2023 5:00pm ET

**Additional things to note:**

- If you currently use EAP's (Enhanced Appointment type profiles), the appointment type code changes may affect these as well. Please inquire with your support analyst if there are questions about this.
- With any appointment type code change that is requested there are manual updates that will need to be made to your writing companies (in the Companies Menu) to add these appointment types. Please inquire with your support analyst if there are questions about how to do this.
- Please review the codes. If you currently use these or they align with your business, you will want to request the new code. Please submit a request for new codes you plan to use through your My Vertafore Portal.
- Sales Authorization will be updated.

**Code/Mapping Changes**

State	Change	Description
Delaware	Appointments/Terminations	NPN is now required and SSN is now optional for individuals.
Puerto Rico	Appointments/Terminations	NPN is now required and SSN is now optional for individuals.
Virgin Islands	Appointments/Terminations	NPN is now required and SSN is now optional for individuals.

**Florida Code Changes**

Entity	License	Qualification	Appointment	Action
IL	Non-Resident Agent (410)	Non-Resident Motor Vehicle Rental (1886)	Non Resident Motor Vehicle Rental 0923	Appointment Added

**Illinois Code Changes**

Entity	License	Qualification	Appointment	Action
IL, BE	Insurance Producer (011)	-	-	License made Historical

**Nebraska Code Changes**

Entity	License	Qualification	Appointment	Action
IL	Insurance Producer (065)	Pet (1692)	Producer (1196)	License, Qualification Added

**Vertafore customer support is available to assist with any questions or concerns you have regarding this notification at 877-876-4430.**

## Section: Sircon Notifications

Vertafore recommends that someone within your organization review the Code/Mapping Changes for each state to determine if the code use indicators need to be turned on for your company.

For each **State**, you will see the **Entity Type** that is affected by the change (IL for Individual Licensee or BE for Business Entity) as well as the name of the **License**, **Qualification**, or **Appointment** that is updated. The **Action** column describes the change that was made.

For example, in the code change notification below, the following changes are being made:

- In Florida, Individual Licensees with a Non-Resident Agent (410) license and a Non-Resident Motor Vehicle LOA, are now able to submit Non-Resident Motor Vehicle Rental appointments.
- In Nebraska, Individual Licensees have a new license and qualification added. The Insurance Producer License and Pet qualification. The appointment type is Producer.


If Vertafore inactivates codes, you will see a message that an item was made historical in the **Actions** column. In this example, the Insurance Producer license type was made historical in Illinois.

Code/Mapping Changes				
State	Change	Description		
Delaware	Appointments/Terminations	NPN is now required and SSN is now optional for individuals.		
Puerto Rico	Appointments/Terminations	NPN is now required and SSN is now optional for individuals.		
Virgin Islands	Appointments/Terminations	NPN is now required and SSN is now optional for individuals.		
Florida Code Changes				
Entity	License	Qualification	Appointment	Action
IL	Non-Resident Agent (410)	Non-Resident Motor Vehicle Rental (1886)	Non Resident Motor Vehicle Rental 0923	Appointment Added
Illinois Code Changes				
Entity	License	Qualification	Appointment	Action
IL, BE	Insurance Producer (011)	-	-	License made Historical
Nebraska Code Changes				
Entity	License	Qualification	Appointment	Action
IL	Insurance Producer (065)	Pet (1692)	Producer (1196)	License, Qualification Added
Vertafore customer support is available to assist with any questions or concerns you have regarding this notification at 877-876-4430.				

Section: Sircon Notifications

In the *Summary and Customer Action* section of the notification, you will see the dates that the changes are effective in the **User Acceptance Testing** (or UAT) environment and the **Production** environment.

You will also see the dates you need to request the code changes for the codes to be available for your organization.



01/27/2023

**Notice of Code Changes for Producer Manager™ and Producer Central™**

We are updating electronic processing capabilities in Producer Manager and Producer Central to support regulatory changes and electronic processing standards. The updates will assist you in your compliance efforts. Details are listed in the tables below.

**Summary and Customer Action**

Environment	Effective Date	Request By Date
UAT	01/27/2023	As soon as possible
Production	02/10/2023	02/08/2023 5:00pm ET

**Additional things to note:**

- If you currently use EAP's (Enhanced Appointment type profiles), the appointment type code changes may affect these as well. Please inquire with your support analyst if there are questions about this.
- With any appointment type code change that is requested there are manual updates that will need to be made to your writing companies (in the Companies Menu) to add these appointment types. Please inquire with your support analyst if there are questions about how to do this.
- Please review the codes. If you currently use these or they align with your business, you will want to request the new code. Please submit a request for new codes you plan to use through your My Vertafore Portal.
- Sales Authorization will be updated.

If you need any of the code use indicators in the notification turned on for your organization, follow the steps in [the Requesting Code Use Indicator Updates](#) section of the quick guide to request assistance from your Vertafore Support Contact.

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## **APPENDIX 1: Sircon for Carriers Help Resources**

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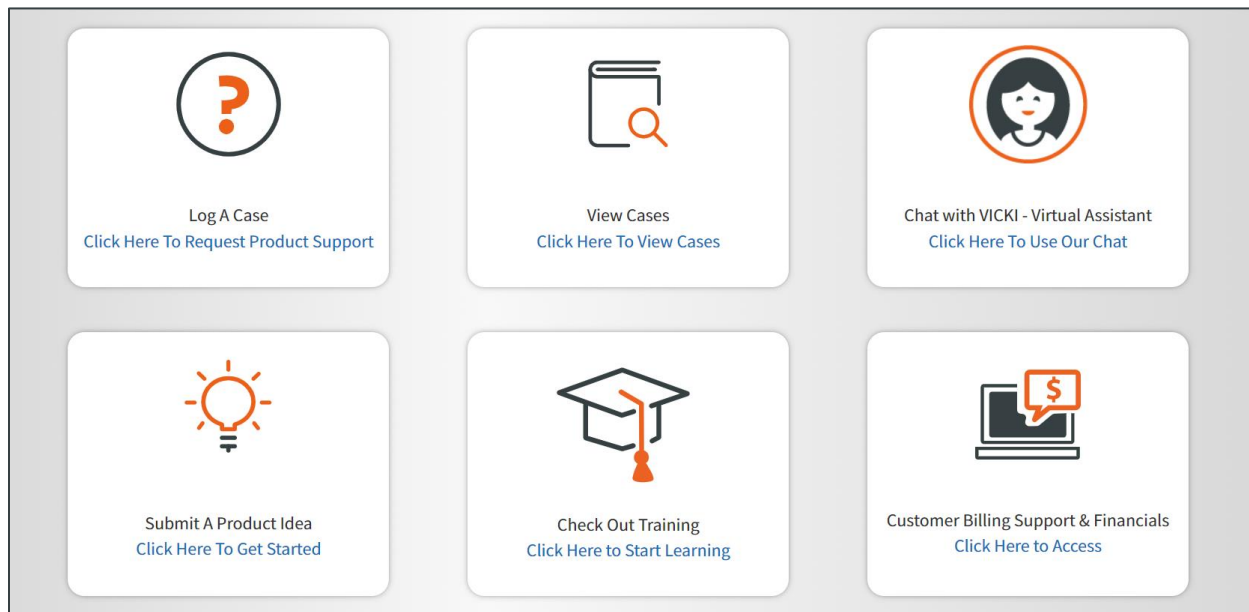
Help is just a click away. Vertafore has two resources available to support you 24/7:

- 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.

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***APPENDIX 2: Document History***

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Version	Revision Date	Revision Record
1.0	7/11/2023	Original Document





999 18<sup>th</sup> St | Denver, CO, 80202 | 877.876.4430 | [Vertafore.com](https://www.vertafore.com)

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