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# SIRCON FOR CARRIERS

## Branch Office Syncing

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## Overview

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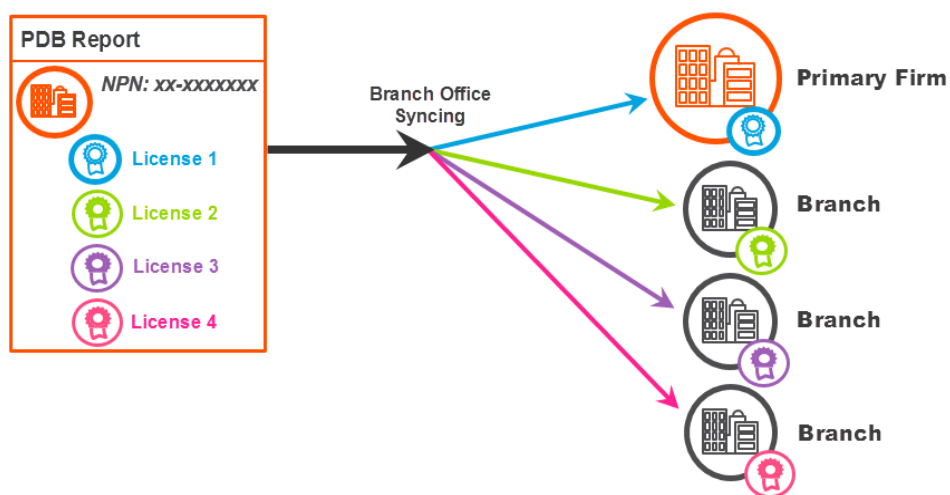
### Introduction and Background

Most customers track agency licenses, qualifications, and appointments in Producer Central and want to keep this information synchronized with state data through Producer Central's automated data reconciliation services. Often, a large agency (or "mega-firm") will have multiple branch offices or sub-agencies, any of which may have its own licenses, qualifications, or carrier appointments to track.

When the main agency and its branch locations all have different Federal Employer Identification Numbers (EIN), then they can be kept up to date using the standard method without enabling the Branch Office Syncing functionality. In this case you would have separate producer records in Producer Central for the main office and for each branch. Automated data reconciliation will update each record and its distinct licenses, qualifications, and appointments.

When the main agency and its branch location share Federal Employer Identification Numbers (EIN), Branch Office Syncing functionality should be used to keep these branch records up to date. The license, qualification, and appointment data for the main agency and all its branches are combined by state in a single report on the national PDB, with little indication of which credentials are held by which location.

Branch Office Syncing allows this mix of licensing information to be separated and associated with specific producer records. This prevents Data Reconciliation errors due to multiple licenses of the same type in the same state, a result of the combined PDB Report.



**Note:** In Producer Central, your company may currently have numerous identical records for a master agency and its branch agencies, differentiated only by the value in each record of the External System ID field of a certain external system type (e.g., Agency Code).

Which record is identifiable as the default record and which are branch agency records are based on the external system ID is information that are maintained by your licensing staff. Vertafore cannot be responsible for errors resulting from inadvertent changes to records based on mistaken identity.

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

This document is intended as a best practice guide for using Producer Central and Producer Central to track the compliance data of a master agency and its branch locations when all share a single EIN.

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

Any users that need to manage branch office syncing in Producer Central.

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

Use this document when you need to create or manage branch office syncing for agencies in Producer Central.

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## The Basics of Branch Office Updates

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Branch records are no different from other firm producer records, except that they share one PDB Report. On these reports, information is divided into groupings called **PDB Groups**. This information is provided on the PDB and is used to help determine what information on the PDB is from the same branch.

Branch Office Syncing takes this shared PDB report, breaks it down into smaller groupings, and then assigns the grouped information to firm records. A single branch record can have many PDB Groups assigned to it, but a PDB Group may only be assigned to one producer record.

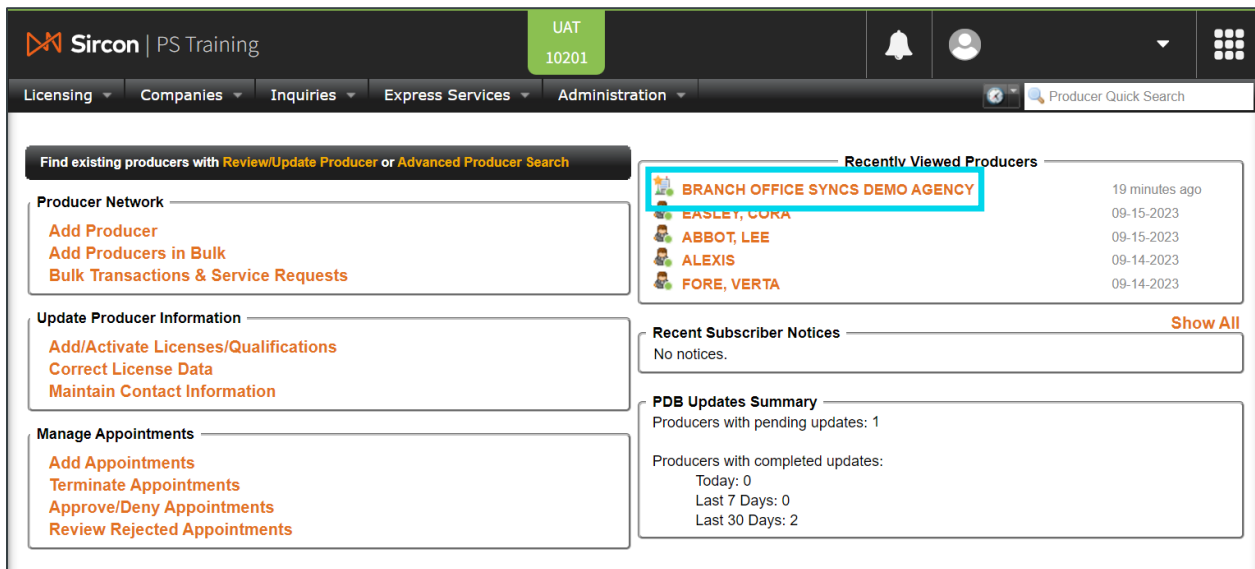
### Navigating to the Branch Office Licensing Assignment Page

The *Branch Office Licensing Assignments* page is the hub of the Branch Office Syncing Functionality. This page is from the perspective of the PDB report and thus is shared by all branch records with the same EIN. Any record can access this page by using either of the following two methods:

- From the Producer Record
- From the Data Reconciliation page

#### NAVIGATE TO BRANCH OFFICE SYNCING FROM PRODUCER RECORD

1. Search for the firm's producer record using the **Producer Quick Search** or open the record from the **Recently Viewed Producers** section on the main page of Producer Central.



The screenshot shows the Vertafore Producer Central interface. At the top, there is a navigation bar with the Sircon logo, 'PS Training', and a 'UAT 10201' button. Below this is a menu with options: Licensing, Companies, Inquiries, Express Services, and Administration. A search bar labeled 'Producer Quick Search' is also present.

The main content area is divided into several sections:

- Find existing producers with Review/Update Producer or Advanced Producer Search**: A search bar with options to 'Add Producer', 'Add Producers in Bulk', and 'Bulk Transactions & Service Requests'.
- Update Producer Information**: Options to 'Add/Activate Licenses/Qualifications', 'Correct License Data', and 'Maintain Contact Information'.
- Manage Appointments**: Options to 'Add Appointments', 'Terminate Appointments', 'Approve/Deny Appointments', and 'Review Rejected Appointments'.
- Recently Viewed Producers**: A list of producers with their names and last viewed dates:
 

Producer Name	Last Viewed
BRANCH OFFICE SYNCES DEMO AGENCY	19 minutes ago
EASLEY, CORA	09-15-2023
ABBOT, LEE	09-15-2023
ALEXIS	09-14-2023
FORE, VERTA	09-14-2023
- Recent Subscriber Notices**: A section with 'No notices.' and a 'Show All' link.
- PDB Updates Summary**: A summary of updates, showing 'Producers with pending updates: 1' and 'Producers with completed updates: Today: 0, Last 7 Days: 0, Last 30 Days: 2'.

Section: The Basics of Branch Office Updates

2. Click the **Data Reconciliation** section from the quick links.

### Review/Update Firm

**BRANCH OFFICE SYNCS DEMO AGENCY** Unrated [Search Producer](#)

EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
18-1800011			181800011	PA	

⚠ This producer has invalid information or is missing required information.

**Expand All**

<ul style="list-style-type: none"> <li>Firm Details</li> <li>Producer Business Rules</li> <li>Resident States</li> <li>External Sys IDs</li> <li>Contact Information</li> <li>Address History</li> <li>Email Messages</li> <li>Licenses/Qualifications</li> </ul>	<ul style="list-style-type: none"> <li>Appointments</li> <li>Agreements</li> <li>Individual Associations</li> <li>Costs</li> <li>Aliases</li> <li><b>Data Reconciliation</b></li> <li>State Producer Numbers</li> <li>FINRA Information</li> </ul>	<ul style="list-style-type: none"> <li>Business Units</li> <li>Required Items</li> <li>License Applications</li> <li>Comments</li> <li>Product Certifications</li> <li>Transaction History</li> <li>Professional Liability</li> <li>Authorization Overrides</li> <li>Compensation Profile</li> </ul>
---	--	--

Key: ⚠ = Fix Missing Required Information

3. Using the **Manage Branch Offices** link in the upper right-hand corner of the **Data Reconciliation** section on the *Review Update Producer* page. This will take you to the *Branch Office Licensing Assignments* page in the system.

### Data Reconciliation [Manage Branch Offices](#)

Reconciliation Action	Status	Requested Date	Data Sources	Processing Messages	Producer Modified?	Action
Quick Sync	Processed	07-20-2017	<b>PDB Report</b> Retrieved 07-10-2017	⚠ 1 Unreviewed	<input type="checkbox"/>	
Quick Add	Processed	07-10-2017	<b>PDB Report</b> Retrieved 07-10-2017	⚠ 1 Unreviewed	<input checked="" type="checkbox"/>	

Key: View PDB Report View Reconciliation Details

2 data reconciliations found, displaying all data reconciliations.

NAVIGATE TO BRANCH OFFICE SYNCING FROM DATA RECONCILIATION PAGE

1. From the **Licensing** menu, select **Data Reconciliation Requests**.

Sircon | PS Training
UAT 10201

**Licensing** >

- Producer >
- Appointments >
- Associations >
- Agreements >
- License Applications >
- Education Credentialing >
- Continuing Education >
- Data Reconciliation Requests**
- Sales Authorization >
- Data Fix >
- Add Appointments

review/update Producer or Advanced Producer Search

Service Requests

Qualifications

ation

Recently Viewed Producers

<b>BRANCH OFFICE SYNCS DEMO AGENCY</b>	1 minute ago
<b>EASLEY, CORA</b>	09-15-2023
<b>ABBOT, LEE</b>	09-15-2023
<b>ALEXIS</b>	09-14-2023
<b>FORE, VERTA</b>	09-14-2023

[Show All](#)

**Recent Subscriber Notices**

No notices.

**PDB Updates Summary**

Producers with pending updates: 1

Producers with completed updates:

Section: The Basics of Branch Office Updates

2. Click the **View Reconciliation Details** button.

### Data Reconciliation Requests

**Queued Requests**

- All Requests
- All Requests Needing Review
- My Requests
- My Requests Needing Review

**Queued Requests**

Reconciliation requests that are currently processing or awaiting processing.

**Requests Awaiting Processing**

#	Producer	Request Date	Reconciliation Action	Actions
1	<b>BRANCH OFFICE SYNCS DEMO AGENCY (PA)</b> EIN: 18-1800011	2023-01-26 09:21:59 AM	Add Producer	

**Key:** = View Data Reconciliation Details = Cancel Data Reconciliation

One reconciliation request found.

3. You will now see the *Data Reconciliation Details* page. A yellow warning message is presented after a branch record is updated if there are PDB Groups that are unassigned. Click the **Manage Branch Offices** button.

**Note:** Unassigned PDB Groups indicate PDB information that could not be automatically assigned and that has not been manually resolved.

### Data Reconciliation Details

**BRANCH OFFICE SYNCS AGENCY** Unrated

EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
18-1841100			181841100		

This producer has invalid information or is missing required information.

**Overview**

**Action:** Quick Load With Sync ( [View Job Details](#) )

**Requested Date:** 08-08-2017 2:03 PM

**Requested By:** Emily Klopfer

**Status:** Processed

**Status Date:** 08-08-2017 2:06 PM

**Cost Center:** No cost center was billed because a PDB report was reused.

To improve data reconciliation of firm branch offices, please go to [Manage Branch Offices](#) to manage your branches.

**Reports:**

- [Producer Record Updates](#)
- [PDB Report](#)  
Retrieved 08-08-2017  
Reused because no updates from PDB

**Processing Messages to Review**

**Review Status:** 2 Unreviewed

[Review All](#) / [Reset All](#)

Reviewed	State	Type	Processing Message
<a href="#">Mark as Reviewed</a>		General Recon Error	Your producer may be missing data due to unassigned branches.

Export options: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)




Section: The Basics of Branch Office Updates

4. You will now see the *Branch Office Licensing Assignments* page.

### Branch Office Licensing Assignments

NPN: 181841100  
 EIN: 18-1841100      PM Firm Count: 2

 **Default Branch:** BRANCH OFFICE SYNC'S AGENCY    EIN: 18-1841100    Ext. ID: Branch 1    [Change Default Branch](#) ⓘ



Changes to the Branch Office Licensing Assignments will not take effect until the record is updated with PDB data. You can either wait for the next automatic PDB Update or manually Force Refresh the records.

[Force Refresh All Connected Firms with this EIN](#)

SHOW Assigned | All Address States | All License Types | All License States

Any Assigned Firm

SELECT **All** | None    SELECTED: 0    [Generate PDB Report](#)    [Assign](#)    [Ignore](#)    [Assign to New Branches](#)

Firm	PDB Group	Business Address	Actions									
<input type="checkbox"/>  BRANCH OFFICE SYNC'S AGENCY Ext. ID: Branch 1	43210001	WILKES-BARRE, PA 28066	Ignore Reassign Reassign to New Branch									
		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>License</th> <th>License Type</th> <th>License State</th> </tr> </thead> <tbody> <tr> <td>5098319970 (AC)</td> <td>Non-Res Producer Organization</td> <td>UT</td> </tr> <tr> <td>50004987 (AC)</td> <td>Non-Resident Producer Agency</td> <td>PA</td> </tr> </tbody> </table>	License	License Type	License State	5098319970 (AC)	Non-Res Producer Organization	UT	50004987 (AC)	Non-Resident Producer Agency	PA	
License	License Type	License State										
5098319970 (AC)	Non-Res Producer Organization	UT										
50004987 (AC)	Non-Resident Producer Agency	PA										
<input type="checkbox"/>  BRANCH OFFICE SYNC'S AGENCY Ext. ID: 0000000078	42802304	SALEM, OR 92001-2040	Ignore Reassign Reassign to New Branch									

This PDB Group has 1 hidden license because of disabled Use Indicators.

Key: (AC) = Active License    (IN) = Inactive License

Page 1 of 1    10

## Default Branches

A **Default Branch** is the producer record that holds much of the licensing information. The key function of the Default Branch is to ensure consistent behavior when automatically assigning PDB Groups during data reconciliation. All new mappings will be automatically assigned to the Default Branch record at the time of the data reconciliation.

On the Branch Office pages, the Default Branch is indicated by star in the upper left corner of the firm icon. The Default Branch is also identified at the top of each branch office page.

### Branch Office Licensing Assignments

NPN: 2000000019  
 EIN: 00-6233077      PM Firm Count: 1

 **Default Branch:** DEAN AND DAVIS INSURANCE AG... (GA)    EIN: 00-6233077    [Change Default Branch](#) ⓘ

## Section: The Basics of Branch Office Updates

There can only be one Default Branch per unique EIN. The Default Branch can be changed to another PM record with the same EIN from the *Branch Office Licensing Assignments* page.

A Default Branch cannot be deleted if there are multiple firm records with the same EIN, but it can be deleted if it is the only firm with the EIN. The Default Branch will always be the first record to be connected and the last to be disconnected.

**Note:** If your organization uses the Outbound Data Feed, changes to the Default Branch will not be present in the Outbound Data Feed and will not trigger the Outbound Data Feed. Changes to agency licenses, qualifications, appointments, or any other PDB information on a producer record as a result of changing the Default Branch will be present in the feed.

## PDB Groups

A **PDB Group** is an attribute provided on the PDB which groups license, appointment, and demographic information that is known to belong to the same branch location. Each branch office can be assigned multiple PDB Groups, but a PDB Group can only belong to a single branch office.

Each PDB Group is identified by a **PDB Group ID** and includes demographic information, such:

- Addresses
- Aliases
- Licenses with their associated lines of authority
- Appointments

The *Branch Office Licensing Assignments* page displays a table of PDB Groups with the associated branch records. The *Branch Office Licensing Assignments* page only displays the associated license information for a PDB Group because that is the information which is used to determine if there is a collision.

Firm	PDB Group	Business Address	Actions		
<input type="checkbox"/> Unassigned	37388975	Dayton, OH 44122	<a href="#">Ignore</a> <a href="#">Assign</a> <a href="#">Assign to New Branch</a>		
			<b>License</b>	<b>License Type</b>	<b>License State</b>
			49304987 (AC)	Non-Resident Producer Agency	PA
			U0255432 (AC)	Non-Resident Producer Firm	ID
			8319970 (AC)	Non-Resident Producer Firm	MI
<small>This PDB Group has 1 hidden license because of disabled Use Indicators.</small>					


**Note:** To see the other information full PDB Report can be viewed from the Inquiries menu in Producer Central.

PDB Groups are unique identifiers only within a PDB report. In other words, PDB Groups can only be used within the context of a single PDB Report and cannot be used to compare multiple different PDB Reports.

PDB Groups are identifiers at a State Level in the PDB Report. This means that for a branch location that is licensed in multiple states they will have at least as many PDB Groups as the number of states in which they hold a license.

## License Collisions

A license collision results from having two different licenses that have the same license type in the same state on a single PDB Report. A producer's record can only have one license of a particular type in a particular state; collisions will result in an error indicating that there is an invalid data scenario. An example of a license collision is shown in the picture below where there are two Non-Resident Producer Agency licenses in the state of Pennsylvania.

<input type="checkbox"/> Unassigned	902304	WILLIAMSBURG, PA 20133	Ignore Assign Assign to New Branch
<input type="checkbox"/>  BRANCH OFFICE SYNCS AGENCY	43210001	WILKES-BARRE, PA 28066	Ignore Reassign Reassign to New Branch

License collisions are a large problem for mega-firms with multiple branches because each branch can have its own licenses, some of which might have the same type in the same state as another branch. When the information is rolled up on the PDB and then synced, this results in an error and the record is not able to be synced.

Branch Office Syncing prevents collisions from occurring by allowing a producer record to only be assigned PDB Groups that do not collide with any other PDB Groups assigned to that producer record.

Section: The Basics of Branch Office Updates

A PDB Group which contains a license that is in a collision state will not be automatically assigned to the Default Branch. Manual intervention is necessary to determine which of the two or more PDB Groups that are in collision should be assigned to which producer record. For more information on managing License Collisions see the [Managing Branches Offices](#) section of this guide.

### Branch Office Syncing Options



Branch Office Syncing functionality can be utilized using the following two methods:

- Multiple producer records are created for each branch office location.
- A single branch office is created, and all other branch office locations are ignored.

#### MULTIPLE PRODUCER RECORDS ARE CREATED FOR EACH BRANCH OFFICE LOCATION (RECOMMENDED PROCESS)

In this scenario a separate producer record is created for each branch office that is tracked. Then for a set of PDB Groups that are in collision, every PDB Group in the set will be assigned to a different producer record.

Once all the PDB Groups have been assigned, all the PDB information will be merged onto the assigned branch record during data reconciliation and the branch office processing message will no longer appear (until another new branch is added on the PDB).

<input type="checkbox"/>  <b>BRANCH OFFICE SYNC'S AGENCY</b> Ext. ID: 0000000075	43210001	WILKES-BARRE, PA 28066		Ignore Reassign Reassign to New Branch
			<b>License</b>	<b>License Type</b>
			5098319970 (AC)	Non-Res Producer Organization
			50004987 (AC)	Non-Resident Producer Agency
<input type="checkbox"/>  <b>BRANCH OFFICE SYNC'S AGENCY</b> Ext. ID: 0000000076	902304	WILLIAMSBURG, PA 20133		Ignore Reassign Reassign to New Branch
			<b>License</b>	<b>License Type</b>
			PA-123409 (AC)	Non-Resident Producer Agency


## Section: The Basics of Branch Office Updates

### A SINGLE PRODUCER RECORD IS CREATED FOR THE MAIN OFFICE LOCATION

This is the solution for those that do not want to allow multiple records with the same EIN in the system. In this scenario a single record is created for the main location and as many PDB Groups as possible are assigned to the record.

This only allows one license of a given type in a given state to be assigned because there cannot be collisions. In this case, all other PDB Groups that could not be assigned due to collisions will not be synced onto any record and will not be tracked.

It is recommended that licenses that are not able to be assigned are ignored in order to remove the branch office processing messages from constantly reoccurring (unless another new branch is added on the PDB).

<input type="checkbox"/>	 <b>BRANCH OFFICE SYNC'S AGENCY</b> Ext. ID: 0000000075	43210001	WILKES-BARRE, PA 28066				Ignore Reassign Reassign to New Branch
				<b>License</b>	<b>License Type</b>	<b>License State</b>	
				5098319970 (AC)	Non-Res Producer Organization	UT	
				50004987 (AC)	Non-Resident Producer Agency	PA	
<input type="checkbox"/>	Ignored	902304	WILLIAMSBURG, PA 20133				Assign Reassign to New Branch
				<b>License</b>	<b>License Type</b>	<b>License State</b>	
				PA-123409 (AC)	Non-Resident Producer Agency	PA	

When choosing between options on tracking branch offices keep in mind the following:

- Only by tracking multiple producer records will all the licensing information be merged into the system if there are conflicts between PDB Groups.
- Tracking multiple producer records is a more accurate representation of the PDB Information.
- Using only one producer record will place information from multiple branch locations all on the same record but will not necessarily include all the PDB information.
- Using multiple producer records can have implications on downstream systems. There will be multiple producer records with the same EIN.

## Differentiating Between Branch Office Records Using External System Identifiers

The primary method to identify a branch agency record should always be an **External System Identifier** value. If you are already differentiating among the various mega-agency records in another system (policy admin or new business, for example), you probably already have an **External System Type** (Agency ID, for example) and **External System ID** (a unique code) established for each of the mega-agency records.

Simply provide that information on the producer's record. If you do not see the appropriate External System Type, contact your system administrator or Vertafore representative.

External System IDs can be found in the producer badge throughout the Branch Office Functionality user interface. On these pages, all active External System IDs associated with the producer will be listed. External System ID can be any value and is configurable by customer.

<input type="checkbox"/> <b>BRANCH OFFICE SYNCS AGENCY</b> 43210001      WILKES-BARRE, PA 28066		<a href="#">Ignore</a> <a href="#">Reassign</a> <a href="#">Reassign to New Branch</a>		
<input type="checkbox"/> Ext. ID: Branch 1 0000000075		License	License Type	License State
		5098319970 (AC)	Non-Res Producer Organization	UT
		50004987 (AC)	Non-Resident Producer Agency	PA

## Enabling Branch Office Updates

Configuration is necessary in order to take advantage of Branch Office Syncing functionality.

### Configuration Points

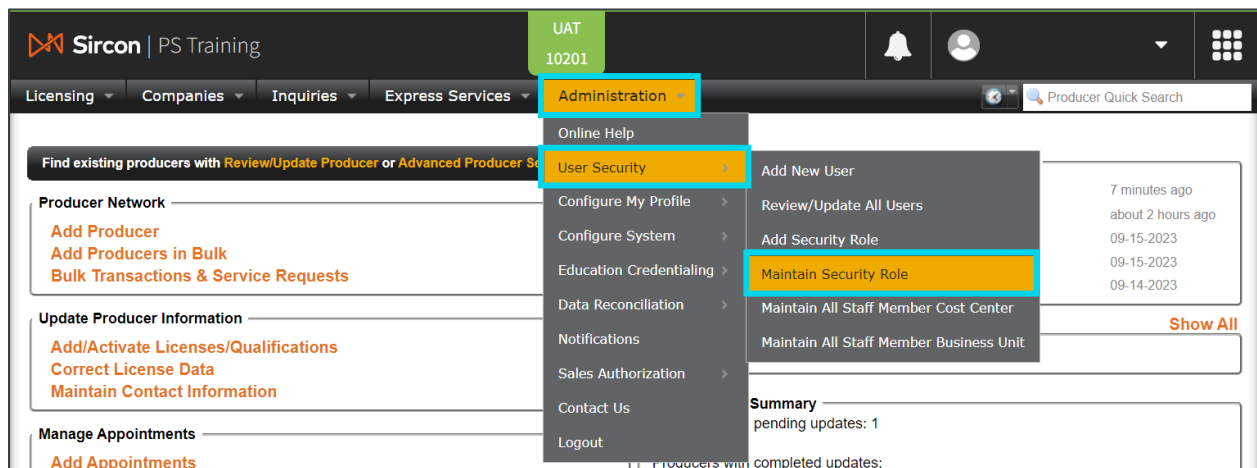
#### BRANCH OFFICE SYNCING BUSINESS RULE CONFIGURATION

Branch Office Syncing functionality is controlled by a business rule that is Vertafore-configured. To enable this rule, contact your Vertafore representative.

#### SECURITY FUNCTIONS

In order to view the *Branch Office Assignments* page, a security function must be enabled.

- To enable the Branch Office security function, use the **Administration** menu at the top of the application to navigate to the **User Security** menu and either **Add Security Role** or **Maintain Security Role**.



- For each role that needs access to this functionality, locate the **Branch Office Assignments** function in the Producer Section and then confirm that it is selected and the box is checked.

- Advanced Producer Search
- Branch Office Assignments
- Company Relationships
- Create a new PX Request
- Data Reconciliation Details
- Delete Comments

## Section: Enabling Branch Office Updates

3. In order to assign or create new branches on the *Branch Office Licensing Assignments* page, another security function must be enabled because these actions automatically connect the record. For each role that needs access to this functionality, locate the **Review Sircon Subscription** function in the Producer Section and then confirm that is selected and the box is checked.

**Review Sircon Subscription**

## FIRM UNIQUE IDENTIFIER BUSINESS RULE CONFIGURATION

The **Firm Unique EIN** and **Firm Unique NPN** business rules control whether multiple firms with the same EIN/NPN can be created in the system. To enable this rule, contact your Vertafore representative.

### Defining the Firm Default Branch

For a firm record to use Branch Office syncs to keep up to date, a **Default Branch** must be selected. Records that do not have a Default Branch will not use Branch Office Syncing functionality regardless of the configuration of the Branch Office business rule.

A **Default Branch** is the Producer Record that holds the majority of the licensing information. The key function of the Default Branch is to ensure consistent behavior when automatically assigning PDB Groups during a sync.

It can also be used to determine whether a firm record should use Branch Office Syncing. If there is not a Default Branch selected, then Branch Office Syncing will be disabled for that particular EIN. Once a Default Branch is chosen, then Branch Office Syncing will be enabled for that EIN.

There are a few scenarios for how a Default Branch is initially assigned for an EIN:

#### 1. **The first record for an EIN is loaded into the system after Branch Office Syncing was enabled.**

If a record is added to the system after Branch Office Syncing was enabled, and it is the first record created for a given EIN, then it will be designated as the Default Branch.

In a Quick Load file, the first row in the file for a specific EIN will be the Default Branch. Branch Office Syncing is enabled for these records without needing to manually select a Default Branch record.



## Section: Enabling Branch Office Updates

**2. The first record for an EIN is loaded into the system after Branch Office Syncing has been enabled.**

If a record is added to the system after Branch Office Syncing was enabled, and it is the first record created for a given EIN, then it will be designated as the Default Branch. Branch Office Syncing is enabled for these records without needing to manually select a Default Branch record.

**3. Records were loaded into the system before Branch Office Syncing was enabled.**


- There are multiple preexisting firm records for the EIN:

Because there can only be a single firm record that is designated as Default Branch for each EIN, the **Default Branch** must be selected from amongst multiple records. Because these records were created using the same PDB report and have much of the same information it is not possible for the system to automatically determine which of the multiple preexisting records should be Default.

Therefore, it takes manual intervention to choose the Default Branch using the **Choose a Default Branch** link in the header of the *Branch Office Licensing Assignments Page*.

**Branch Office Licensing Assignments**

NPN: 181841100  
EIN: 18-1841100      PM Firm Count: 1

 **Default Branch:** [Choose a Default Branch](#) ⓘ

**Note:** Until the Default is chosen for these records, they will continue to sync using the standard method. Once the Default Branch has been selected, they will begin to use Branch Office Syncing.

- There is a single preexisting firm record for the EIN:

Because there is only a single firm record, it becomes a straightforward matter to choose the Default Record.

For these preexisting records, the **Default Branch** will be automatically assigned to the existing single firm record. Therefore, Branch Office syncing will be initially enabled for these records without manual intervention.

---

## Loading Firm Branch Records

---

When adding a firm to Producer Central, it is not necessary to know that it is a “mega-firm”. If a firm is loaded and results in a Branch Office Syncing processing message, then a user can assign PDB Groups to the default record that was just created and/or create and assign PDB Groups to new records using the Branch Office Licensing Assignments page.

One important thing to note is that the first record that is created will be the **Default Branch**. In the case that this is not the record that should be designated as the default for any new licensing information, then the Default Branch can be updated.

### Creating the Initial Default Branch Record

To create the Default producer record, use the **Add Producer** workflow to create a firm. The shell record for the Default Firm will be immediately created with a connected status and will begin receiving Daily Updates for all states. The first Daily Sync will update the shell record with PDB information and will pull in all the PDB Group information needed for assigning and create Branch Offices.

**Add Producer**

Producer Type :  Firm  Individual Licensee ⓘ

Name  EIN

**Note:** See the [Adding and Searching for Producers quick guide](#) for detailed instructions on how to create a firm producer record.

### Creating Branch Records

Branch records (i.e. producer records with the same EIN) can only be created using the *Branch Office Licensing Assignments* page. A PDB Group will have the option in the **Actions** column to **Assign to a New Branch** or **Reassign to a New Branch**.

This option begins a workflow to create a new PM firm record with the same EIN and assigns the selected PDB group to the newly created record automatically.

Section: Loading Firm Branch Records

Firm	PDB Group	Business Address	Actions		
<input type="checkbox"/> Unassigned	37388975	Dayton, OH 44122	<a href="#">Ignore</a> <a href="#">Assign</a> <a href="#">Assign to New Branch</a>		
			License	License Type	License State
			49304987 (AC)	Non-Resident Producer Agency	PA
			U0255432 (AC)	Non-Resident Producer Firm	ID
			8319970 (AC)	Non-Resident Producer Firm	MI
<i>This PDB Group has 1 hidden license because of disabled Use Indicators.</i>					

The *Create a Firm to Assign a Branch* page will display the selected PDB Group at the top of the page. Below, additional information can be provided which will be saved to the firm record when it is created. This includes:

- Firm Type
- Active Business Unit
- Cost Center
- External System Id Type
- External System Id. Firm Type,

**Note:** Active Business Unit, and Cost Center will be defaulted to the same value as the Default Branch record. The record will be created with a connected status.

### Branch Office Licensing Assignments

NPN: 181841100  
 EIN: 18-1841100      PM Firm Count: 2

**Default Branch:** BRANCH OFFICE SYNCS AGENCY    EIN: 18-1841100    Ed. ID: Branch 1    [Change Default Branch](#)

#### Create a Firm to Assign a Branch

Firm	PDB Group	Business Address	License	License Type	License State
<input type="checkbox"/> Unassigned	37388975	Dayton, OH 44122			
			49304987 (AC)	Non-Resident Producer Agency	PA
			U0255432 (AC)	Non-Resident Producer Firm	ID
			8319970 (AC)	Non-Resident Producer Firm	MI
<i>This PDB Group has 1 hidden license because of disabled Use Indicators.</i>					

**Key:** (AC) = Active License    (IN) = Inactive License

Provide information for the new producer record:

Firm Type:

Active Business Unit:

Cost Center:

External System ID Type:

External System ID:

## Creating Multiple Branch Records

Multiple branch records (i.e. producer records with the same EIN) can be created using the bulk actions on the *Branch Office Licensing Assignments* page. This bulk action will create a new Producer Record for each selected PDB Group. In other words, if 10 PDB Groups are selected there will be 10 new branch records, each assigned one PDB Group after the bulk workflow is completed.

To choose the PDB Groups that will be assigned to new records, select the checkboxes on the far left of the desired PDB groups. To choose all the PDB Groups, select the **All** option above the table containing the PDB Groups. Next, click the **Assign to New Branches** bulk action button in the SELECT menu above the table containing the PDB Groups.

### Branch Office Licensing Assignments

NPN: 181841100  
EIN: 18-1841100 **PM Firm Count: 2**

**Default Branch:** BRANCH OFFICE SYNC'S AGENCY EIN: 18-1841100 Ext. ID: Branch 1 [Change Default Branch](#)

Changes to the Branch Office Licensing Assignments will not take effect until the record is updated with PDB data. You can either wait for the next automatic PDB Update or manually Force Refresh the records.

[Force Refresh All Connected Firms with this EIN](#)

SHOW All PDB Groups All Address States All License Types All License States

Any Assigned Firm

SELECT **All** | None SELECTED: 1 [Generate PDB Report](#) [Assign](#) [Ignore](#) [Assign to New Branches](#)

Firm	PDB Group	Business Address	Actions
<input checked="" type="checkbox"/> Unassigned	37388975	Dayton, OH 44122	<a href="#">Ignore</a> <a href="#">Assign</a> <a href="#">Assign to New Branch</a>
		License License Type License State	
		49304987 Non-Resident Producer PA	

This begins the workflow to create a new PM firm record with the same NPN and assign the selected PDB group to the newly created record automatically for each of the selected PDB Groups.

For each PDB Group selected, there will be a corresponding *Create a Firm to Assign a Branch* page with the PDB Group to be assigned at the top of the page. Additional information can be provided which will be saved to the firm record. This includes:

- Firm Type
- Active Business Unit
- Cost Center
- External System ID Type
- External System ID

Section: Loading Firm Branch Records

**Note:** Firm Type, Active Business Unit, and Cost Center will be defaulted to the same value as the Default record. Each record will be created with a connected status.

### Branch Office Licensing Assignments

NPN: 181841100      PM Firm Count: 2  
 EIN: 18-1841100

🏠 **Default Branch:** BRANCH OFFICE SYNC'S AGENCY    EIN: 18-1841100    Ext. ID: Branch 1    [Change Default Branch](#) ⓘ

**Create a Firm to Assign a Branch**

Firm	PDB Group	Business Address
Unassigned	37388975	Dayton, OH 44122

License	License Type	License State
49304987 (AC)	Non-Resident Producer Agency	PA
U0255432 (AC)	Non-Resident Producer Firm	ID
8319970 (AC)	Non-Resident Producer Firm	MI

This PDB Group has 1 hidden license because of disabled Use Indicators.

Key:    (AC) = Active License    (IN) = Inactive License

Provide information for the new producer record:

Firm Type           

Active Business Unit   

Cost Center           

External System ID Type   

External System ID

- Click **Continue** to move to the next PDB group to create another branch record.
- Click **Cancel** to return to the *Branch Office Licensing Assignments* page.
- Clicking **Cancel** after clicking **Continue** for one or more branches will result in those records being created. The remaining records will not be created. These can later be selected again to assign to a new or existing branch.

**Note:** The procedures outlined in this document assume that the ORG\_UNIQ\_EIN business rule in your company's configuration of Producer Central has been set to "NO," which allows a firm record to have an identical value in the EIN field as another. If you have questions, please contact your Vertafore representative.

ADDING EXTERNAL SYSTEM IDENTIFIERS TO FIRM RECORDS

1. Navigate to the *Review/Update* page of the record to which an External System ID needs to be added. Click **Add/Update/Delete External System Identifiers**.

External Sys IDs <span style="float: right; font-size: x-small;">Top</span>				
External System Type	External System Identifier	Business Unit	Primary	Inactive
AGENCYID	0000000076		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#" style="border: 1px solid cyan; padding: 2px;">Add/Update/Delete External System Identifiers</a>				

Section: Loading Firm Branch Records

2. In the **Add External System Identifier** section, enter the branch location's unique **External System Type** and **External System ID**. This information will be the primary differentiator between all of the branch location records.
3. If you are already differentiating among the various mega-agency records in another system (policy admin or new business, for example), you probably already have an **External System Type** (Agency ID, for example) and **External System ID** (a unique code) established for each of the mega-agency records. Simply enter that information.

**Note:** If you do not see the appropriate **External System Type**, contact your system administrator or Vertafore representative.

4. When you are finished, click the **Save and Return** button.

**BRANCH OFFICE SYNC'S AGENCY** Unrated
Search Producer

EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
18-1841100			181841100		
<span style="color: orange;">🔔</span> This producer has invalid information or is missing required information.					

**Current External System Identifiers** Add New External System Identifier

Delete	External System Type	External System ID	Business Unit	Primary	Inactive	
<input type="checkbox"/>	AGENCYID	000000076		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit
Delete						Return

**Add/Update External System Identifiers** Clear

External System Type	External System ID		Business Unit	Primary	Inactive
<input type="text"/>	<input type="text"/>	<input type="button" value="Generate ID"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Save				Return	Save and Return

## Managing Branch Offices


Branch Office Updates uses the shared PDB report between firms with the same EIN to break the report down into smaller groupings, and then assign the grouped information to firm records.

Branch Office Updates can be managed from the *Branch Office Licensing Assignments* page. Each **PDB Group** should be either assigned to the appropriate producer record in order to have the associated PDB information merged onto the record or be ignored in order to prevent the information from being merged onto any producer record.

**Note:** Once all the **PDB Groups** have been assigned or ignored, the Branch Office processing and warning messages will no longer appear (until new information is on the PDB) and ongoing updates will use the assignments going forward.

### Branch Office Licensing Assignments

NPN: 181841100  
EIN: 18-1841100      PM Firm Count: 2

 **Default Branch:** BRANCH OFFICE SYNCS AGENCY    EIN: 18-1841100    Ext. ID: Branch 1    [Change Default Branch](#) ⓘ



Changes to the Branch Office Licensing Assignments will not take effect until the record is updated with PDB data. You can either wait for the next automatic PDB Update or manually Force Refresh the records.

[Force Refresh All Connected Firms with this EIN](#)

SHOW Assigned All Address States All License Types All License States

Any Assigned Firm

SELECT All | None    SELECTED: 0    [Generate PDB Report](#)    [Assign](#)    [Ignore](#)    [Assign to New Branches](#)

Firm	PDB Group	Business Address	Actions									
<input type="checkbox"/>  <b>BRANCH OFFICE SYNCS AGENCY</b> Ext. ID: Branch 1	43210001	WILKES-BARRE, PA 28066	<a href="#">Ignore</a> <a href="#">Reassign</a> <a href="#">Reassign to New Branch</a>									
		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>License</th> <th>License Type</th> <th>License State</th> </tr> </thead> <tbody> <tr> <td>5098319970 (AC)</td> <td>Non-Res Producer Organization</td> <td>UT</td> </tr> <tr> <td>50004987 (AC)</td> <td>Non-Resident Producer Agency</td> <td>PA</td> </tr> </tbody> </table>	License	License Type	License State	5098319970 (AC)	Non-Res Producer Organization	UT	50004987 (AC)	Non-Resident Producer Agency	PA	
License	License Type	License State										
5098319970 (AC)	Non-Res Producer Organization	UT										
50004987 (AC)	Non-Resident Producer Agency	PA										
<input type="checkbox"/>  <b>BRANCH OFFICE SYNCS AGENCY</b> Ext. ID: 0000000076	42802304	SALEM, OR 92001-2040	<a href="#">Ignore</a> <a href="#">Reassign</a> <a href="#">Reassign to New Branch</a>									

This PDB Group has 1 hidden license because of disabled Use Indicators.

Key: (AC) = Active License    (IN) = Inactive License

Page 1 of 1    10

## Assigning PDB Groups

Branch Office Licensing functionality depends on associations between a producer record and PDB Groups. This assignment of PDB information to a specific producer record not only resolves data errors but also allows for more accurate tracking of licensing information.

Changes to PDB Group assignments do not directly affect the licensing information on a producer record. In other words, assigning or reassigning a PDB Group to a producer record will not directly make any changes to the record. Instead, the changes to the information on the record will result from data reconciliation. In order to reflect changes in the PDB Group assignments on the producer record, make sure to update the record.

Changes to the licensing assignments that result in a license, qualification, or appointment or other PDB information no longer being merged onto a given record will result in the license, qualification, appointment or other PDB information being put in an inactive status on that record.

Assignments of PDB Groups will automatically connected a producer record if a PDB group is assigned to a disconnected record.

Assignments can be made in two ways:

### 1. Users can manually assign any PDB Group to any branch record (with the EIN) if the PDB group does not conflict with another PDB group assigned to that branch.

- To manually assign a single PDB Group to a producer record, first navigate to the *Branch Office Licensing Assignments* page.
- Then for the PDB Group that is going to be assigned, select the **Assign** or **Reassign** action from the rightmost column on the page.

<input type="checkbox"/> Ignored	902304	WILLIAMSBURG, PA 20133	<b>Assign</b> Assign to New Branch
	<b>License</b>	<b>License Type</b>	<b>License State</b>
	PA-123409 (AC)	Non-Resident Producer Agency	PA

- The assign action opens a search page that is used to select which producer record the PDB Group should be assigned to. The filtering at the top of the page can be used to search for specific records.
- To make the assignment, click the **Select Firm** action for the chosen firm in the right most column of the search result table.



## Section: Managing Branch Offices

**Search for a Firm to Assign a Branch**



Please enter at least one of the search criteria below:

Firm Name	<input type="text"/>		
EIN	<input type="text" value="181841100"/>	NPN	<input type="text"/>
License Number	<input type="text"/>	Active Business Unit	<input type="text"/>
External System ID	<input type="text"/>	License State	<input type="text"/>
		Primary External ID Only	<input checked="" type="checkbox"/>

Records Per Page:

---

Displaying 1 - 2 (of 2 matching records) Page 1 of 1

Name ▲	City	State	License Summary
 <b>BRANCH OFFICE SYNCNS AGENCY</b> EIN: 18-1841100   Ext. ID: Branch 1	SALEM	OR	<a href="#" style="color: orange;">Select Firm</a>
 <b>BRANCH OFFICE SYNCNS AGENCY</b> EIN: 18-1841100   Ext. ID: 0000000076			<a href="#" style="color: orange;">Select Firm</a>

Displaying 1 - 2 (of 2 matching records) Page 1 of 1

- If the licenses in the PDB Group do not conflict with the licenses in any other PDB Group assigned to the selected firm, then the PDB Group will be assigned to the firm and the producer record will be automatically connected if it is in a disconnected status.
- If the PDB Group is in conflict, then a validation error will occur, and a message will be presented notifying the user of the collision and pointing out which licenses state(s) conflicted.
- If there is a conflict, you can choose to either search for another firm to assign the PDB Group to or return to the main Branch Office Licensing Assignments page to choose another PDB Group or ignore the current PDB Group.

**✖** The PDB groups assigned to this firm already contain the license types included in the selected PDB group for the following states:

- GA


NEXT I would like to resolve this issue by:

- [Searching for another firm](#) to assign to this PDB group.
- Returning to [Manage Branch Offices](#).

- The final step is to force update each record that was previously assigned the PDB Group as well as the record to which the PDB Groups is now assigned should be synced.
- This will ensure that changes to the assignments will be reflected on the relevant producer records because changes to PDB Group assignments will not affect a producer record until the record is synced.
- To force update all the branches for an EIN use the **Force Refresh All Connect Firms with this EIN** option at the top of the *Branch Office Licensing Assignments* page. This will start a force refresh for every firm producer record with that EIN.

### Branch Office Licensing Assignments

**NPN:** 181841100  
**EIN:** 18-1841100      **PM Firm Count:** 2

 **Default Branch:** **BRANCH OFFICE SYNC'S AGENCY**    EIN: 18-1841100    Ext. ID: Branch 1    [Change Default Branch](#) ⓘ

Changes to the Branch Office Licensing Assignments will not take effect until the record is updated with PDB data. You can either wait for the next automatic PDB Update or manually Force Refresh the records.

[Force Refresh All Connected Firms with this EIN](#)

## 2. The system can automatically make assignments of unassigned PDB Groups that do not conflict with any other unassigned PDB Group to the Default branch record.

During data reconciliation, all the PDB Groups that are not in conflict with another group will be assigned to the **Default Branch**. The first time adding a firm with a given EIN, all the PDB Groups that are not in conflict will be assigned to Default Branch.

For subsequent updates, any new PDB Groups that appear on the PDB that are not in conflict with another PDB Group will be assigned to the Default Branch. Because this occurs during data reconciliation, the updates to the producer record will be effective immediately and there is no need to initiate another update to see the changes to the producer record.

If PDB Groups that are automatically assigned should be assigned to a producer record that is not the designed Default Branch, then the PDB Group should be reassigned using the actions in on the *Branch Office Licensing Assignments* page.

After making changes to the Branch Office assignments the record that was previously assigned the PDB Group as well as the record to which the PDB Groups is now assigned should be updated. This will ensure that changes to the assignments will be reflected on the relevant producer records because changes to PDB Group assignments will not affect a producer record until the record is synced.

## Ignoring PDB Groups

Ignoring a PDB Group prevents the information associated with the group from being merged with any Producer Central record. This is useful for any branch that you do not wish to track.

For example, if you do not have a relationship with one of the branch locations. Ignore also allows PDB Groups that cannot be assigned to any producer record to be moved from the unassigned status.

## Section: Managing Branch Offices

The benefit of taking the ignore action for a PDB Group instead of leaving it unassigned is that it is an acknowledgement that the group has purposefully been removed from data reconciliation. This will differentiate the PDB Groups that are ignored from the PDB Groups that are new and need manual intervention.

**Note:** By making sure that all PDB Groups are in either an ignored or assigned status, the Branch Office Syncing processing message or yellow warning box on the *Data Reconciliation Details* page will no longer appear until a new PDB Group that cannot be automatically assigned appears on the PDB Report. The ignore action also prevents automatically assigned branches from merging onto any record.

Firm	PDB Group	Business Address	Actions		
<input type="checkbox"/> Ignored	902304	WILLIAMSBURG, PA 20133	<a href="#">Assign</a> <a href="#">Assign to New Branch</a>		
			License	License Type	License State
			PA-123409 (AC)	Non-Resident Producer Agency	PA
<b>Key:</b> (AC) = Active License (IN) = Inactive License					


## Updating the Default Branch

A Default Branch is the Producer Record that holds most of the licensing information. The key function of the Default Branch is to ensure consistent behavior when automatically assigning PDB Groups during a sync.

1. To update the Default Branch, navigate to the *Branch Office Licensing Assignments* page.
2. Then click on the **Change Default Branch** link to the right of the producer badge for the current Default Branch.
3. To the right of this link is an information symbol, that when clicked provides more detailed information on Default Branch.

### Branch Office Licensing Assignments

**NPN:** 181841100  
**EIN:** 18-1841100      **PM Firm Count:** 2

 **Default Branch:** BRANCH OFFICE SYNCNS AGENCY    EIN: 18-1841100    Ext. ID: Branch 1    [Change Default Branch](#) ⓘ

Changes to the Branch Office Licensing Assignments will not take effect until the record is updated with PDB data. You can either wait for the next automatic PDB Update or manually Force Refresh the records.

[Force Refresh All Connected Firms with this EIN](#)

Section: Managing Branch Offices

4. The **Change a Default Branch** link opens a search page that is used to select which producer record is the default.
5. The filtering at the top of the page can be used to search for specific records.
6. To choose the Default click the **Set Default** action for the chosen firm in the right most column of the search result table.

**Search for a Firm to Set as Default Branch**

Please enter at least one of the search criteria below:

Firm Name	<input type="text"/>	EIN	<input type="text" value="181841100"/>	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"/>	Primary External ID Only	<input checked="" type="checkbox"/>				

Records Per Page:  Search Cancel

---

Displaying 1 - 2 (of 2 matching records) Page 1 of 1

Name	City	State	License Summary	
BRANCH OFFICE SYNCS AGENCY EIN: 18-1841100   Ext. ID: Branch 1	SALEM	OR		<a href="#">Set Default</a>
BRANCH OFFICE SYNCS AGENCY EIN: 18-1841100   Ext. ID: 0000000076				<a href="#">Set Default</a>

Displaying 1 - 2 (of 2 matching records) Page 1 of 1

7. After clicking Set Default, you will be directed to the *Select Default Branch* confirmation page. This page will provide relevant warning and informational messages depending on the EINs specific data scenario at the top of the screen.
8. Below this is a table that shows all the PDB Groups that will be automatically assigned to the chosen default branch.
9. Only unassigned, non-conflicting PDB Groups will be assigned to the new Default Branch. PDB Groups that are already assigned to existing records, including the previous Default, will not be reassigned to the selected Default.

**Selected Default Branch: BRANCH OFFICE SYNCS AGENCY Ext. ID: 0000000076**

**i** The following unassigned PDB Groups will be assigned to the Default Branch as a result of this action. To assign a PDB group to a different record or to ignore the group, return to the main Branch Office Licensing Assignments screen by clicking cancel.

**Existing PDB Groups to be Assigned to the New Default Branch**

SHOW

PDB Group	Business Address	License	License Type	License State
37388975	Dayton, OH 44122	49304987 (AC)	Non-Resident Producer Agency	PA
		U0255432 (AC)	Non-Resident Producer Firm	ID
		8319970 (AC)	Non-Resident Producer Firm	MI
<i>This PDB Group has 1 hidden license because of disabled Use Indicators.</i>				

**Key:** (AC) = Active License (IN) = Inactive License

Page 1 of 1 10

Cancel Back Assign

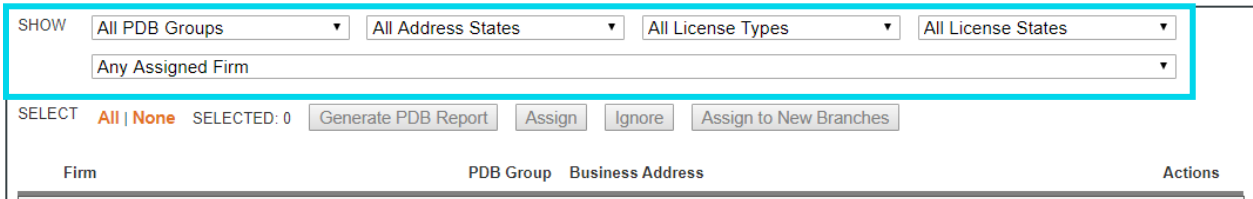
**Note:** The confirmation page only displays information for PDB Groups that are already known by Producer Central as the result of a sync. It is not able to show PDB Groups that have not yet been merged into the system.

After confirming that the correct Default Branch record has been selected, continue the assignment by using the assign button on the bottom right-hand corner of the screen. At this point the PDB Groups listed on the screen will be automatically assigned and you will be directed back to the main *Branch Office Licensing* page where PDB Groups can be assigned or reassigned to producer record.

### Filtering PDB Groups

At the top of the Branch Office Licensing Assignments page are criteria used to filter PDB Groups. PDB Groups can be filtered by the following criteria:

- PDB Group Status
- Producer Record (External System Id)
- Address State
- License Type
- License State



The screenshot shows the top section of the Branch Office Licensing Assignments page. It includes a 'SHOW' section with four dropdown menus: 'All PDB Groups', 'All Address States', 'All License Types', and 'All License States'. Below these is a search box containing 'Any Assigned Firm'. The 'SELECT' section shows 'All | None' and 'SELECTED: 0', followed by buttons for 'Generate PDB Report', 'Assign', 'Ignore', and 'Assign to New Branches'. At the bottom, a table header is visible with columns for 'Firm', 'PDB Group', 'Business Address', and 'Actions'.

### Queuing Updates for Branch Offices

Branches need to be separately added to the data reconciliation queue. In other words, updating one branch record does not mean all the other branch records will be also be updated.


To put all the producer records for an EIN on the queue, use Force Refresh All Connected Firms with this EIN option on the Branch Office Licensing Assignments page. This will put all the producer records on the queue that are not already queued.

Queuing all the producer records for an EIN to be updated ensures that after making changes to the PDB Group assignments any changes will be reflected on the effected producer records.

## Section: Connecting and Disconnecting Branch Records

### Branch Office Licensing Assignments

**NPN:** 181841100  
**EIN:** 18-1841100      **PM Firm Count:** 2

 **Default Branch:** BRANCH OFFICE SYNCNS AGENCY    EIN: 18-1841100    Ext. ID: Branch 1    [Change Default Branch](#) ⓘ


Changes to the Branch Office Licensing Assignments will not take effect until the record is updated with PDB data. You can either wait for the next automatic PDB Update or manually Force Refresh the records.

[Force Refresh All Connected Firms with this EIN](#)

### Use Indicators and Branch Office Syncing Functionality

Collision detection between PDB Groups eliminates records where Use Indicators are turned off. In other words, if more than one PDB Group has the same license type in the same state then regardless of use indicator status those licenses cannot be assigned to the same producer record.

PDB Groups that include PDB information with Use Indicators disabled will include a message with the number of licenses in that group that are disabled because of Use Indicators.

 **BROS FIRM**
42802304    SALEM, OR 92001-2040

[Ignore](#)  
[Reassign](#)  
[Reassign to New Branch](#)

*This PDB Group has 1 hidden license because of disabled Use Indicators.*

## Connecting and Disconnecting Branch Records

### Determining Subscription Status of Branches

Producer Central indicates a producer record's Sircon Subscription Status in multiple ways.

First the producer icon can be used to determine if a producer is connected.

Connected producers – both individual and firm – are indicated with a green dot in the button right of the producer icon.

**Recently Viewed Producers**

 <b>MAZZUCHELLI, CORDELLE</b>	1 minute ago
 <b>INGLETT, AHREANNA</b>	1 minute ago
 <b>ANDREADIS, ADRYANNA RUST</b>	1 minute ago
 <b>BRANCH OFFICE SYNCNS AGENCY</b>	1 minute ago
 <b>BRANCH OFFICE SYNCNS AGENCY</b>	1 minute ago

## Section: Connecting and Disconnecting Branch Records

In addition to producer icons, disconnected producers will have a disconnected banner displayed on their Review/Update Producer page (Figure 3).



The *Review Sircon Subscription* page, linked from a producer's *Review Update* page, also has information on the subscription status. The producer's subscription status is displayed under the producer header including the last date they were connected/disconnected.

Under the producer's subscription status, you will see options to Connect or Disconnect the subscription.

In the *Sircon Services Summary* section there is information about whether the producer is receiving Daily PDB Updates including a PDB lookup for producers who are not receiving Daily Updates. For producers receiving Daily Updates a button is available for you to force refresh the producer data.

**Sircon Subscription Status: Connected**

Since June 27, 2019

Disconnecting the Sircon Subscription will disable core functionality.

---

**Sircon Services Summary**

**Daily PDB Updates**  
Receiving Daily PDB Updates: Yes

*No charges will be incurred for refreshing data.*

**Producer Service Portal**  
Linked to Sircon Account: No

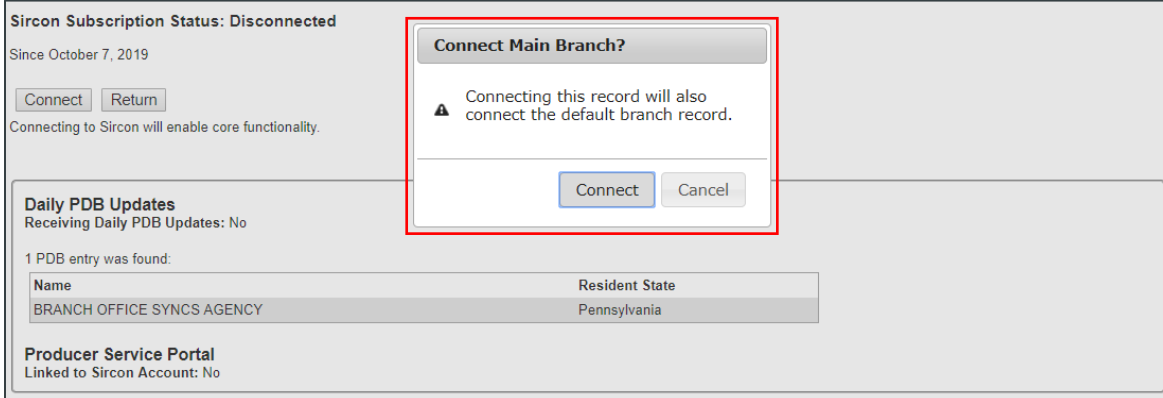
## Connecting and Disconnecting the Default Branch Record

The Default Branch will always be the first record to be connected and the last to be disconnected. This is because the Default Branch is the producer record that will be assigned any new information from the PDB.

### CONNECT DEFAULT BRANCH SUBSCRIPTION

When connecting a firm record in Producer Central, if the firm that is being connected is a branch and the Default firm record is disconnected then a message is displayed. If the user chooses to connect the branch record, then the Default record is also automatically connected.

## Section: Connecting and Disconnecting Branch Records



**Sircon Subscription Status: Disconnected**  
 Since October 7, 2019

Connecting to Sircon will enable core functionality.

**Connect Main Branch?**

**⚠** Connecting this record will also connect the default branch record.

**Daily PDB Updates**  
 Receiving Daily PDB Updates: No

1 PDB entry was found:

Name	Resident State
BRANCH OFFICE SYNCS AGENCY	Pennsylvania

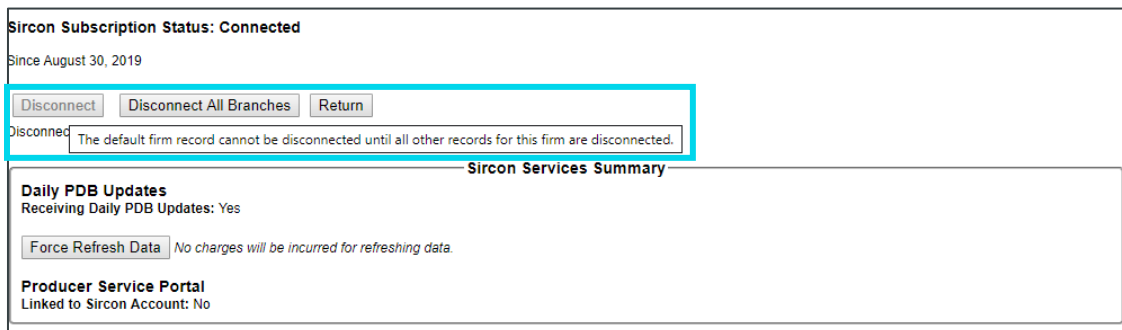
**Producer Service Portal**  
 Linked to Sircon Account: No

**Note:** When connecting a firm using a Bulk Connection Status update, if the firm that is being connected is a branch and the Default record is disconnected then the branch is connected, and the Default record is also automatically connected.

### DISCONNECTING DEFAULT BRANCH SUBSCRIPTION

When disconnecting a firm record in Producer Central, if the firm you are trying to disconnect is a branch, then the branch record is disconnected.

If the firm that is being disconnected is the default firm record, then all the other branch firms must be disconnected before the Default can be disconnected. (The button will be disabled, and a hover-over message will be visible)



**Sircon Subscription Status: Connected**  
 Since August 30, 2019

Disconnected The default firm record cannot be disconnected until all other records for this firm are disconnected.

**Sircon Services Summary**

**Daily PDB Updates**  
 Receiving Daily PDB Updates: Yes

*No charges will be incurred for refreshing data.*

**Producer Service Portal**  
 Linked to Sircon Account: No

**Note:** When disconnecting a firm record using a Bulk Connection Status update, if the firm you are trying to disconnect is a branch, then the branch record is disconnected. If the firm record that is being disconnected is the Default firm, then the Default firm record and branch firm records will all be disconnected.



Section: Connecting and Disconnecting Branch Records

## Disconnecting all the Branches (Including the Default) for an EIN

To disconnect all the branch records without needing to go individually to each producer record, use the **Disconnect All Branches** option on the *Review Sircon Subscription* page.

All the branch records including the Default Branch will be disconnected. This option is only visible if there are two or more connected branches.

**Sircon Subscription Status: Connected**

Since October 7, 2019

Disconnecting the Sircon Subscription will disable core functionality.

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**Sircon Services Summary**

**Daily PDB Updates**  
Receiving Daily PDB Updates: Yes

*No charges will be incurred for refreshing data.*

**Producer Service Portal**  
Linked to Sircon Account: No

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

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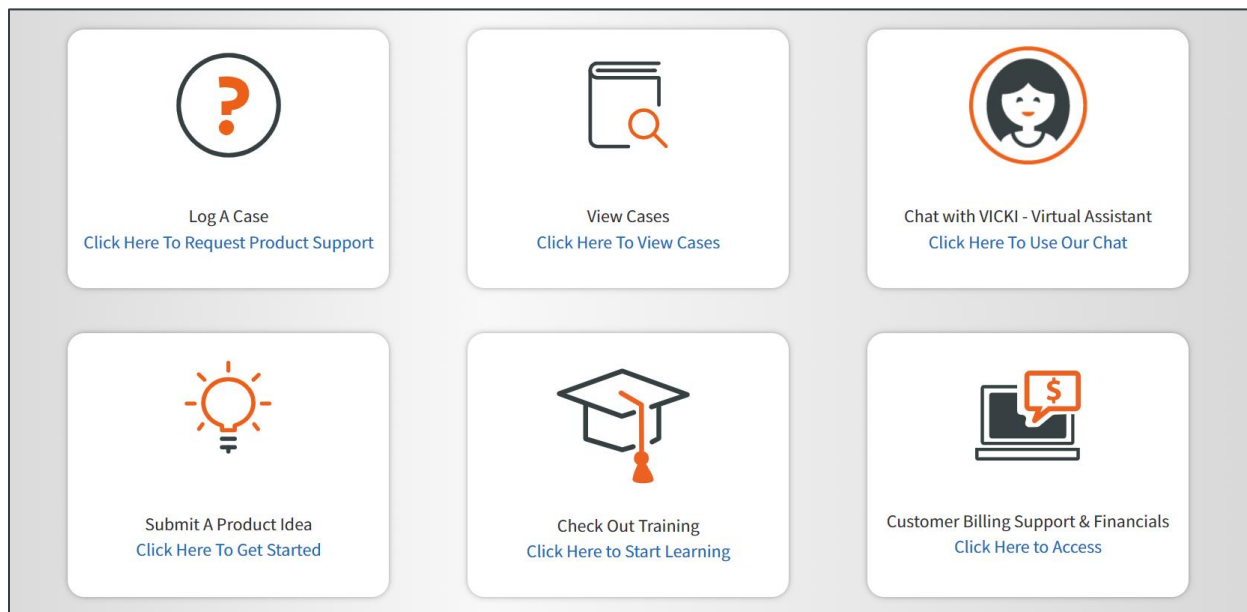
Help is just a click away. Vertafore has two resources available to support you 24/7:

- 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	10/17/2023	Original Document



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

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