



Branch Office Syncing:

A Guide to Adding and Maintaining Records of Agencies with Multiple Branch Locations and a Single EIN Using Producer Manager.

August 8, 2017 | Version 6.4.2

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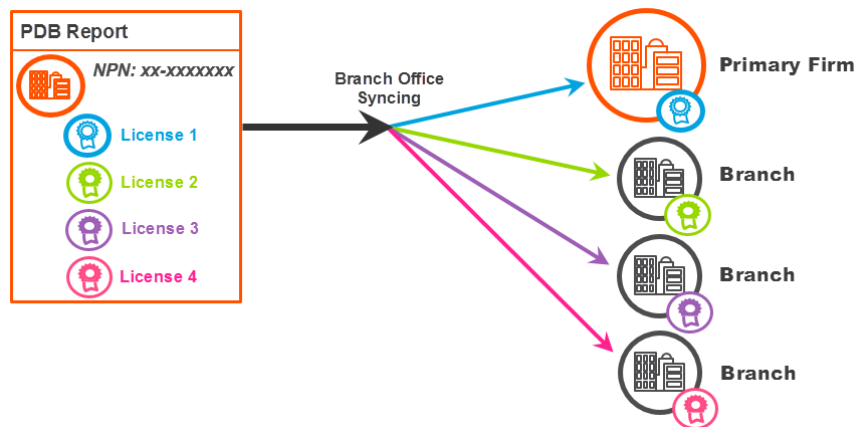
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Overview

Most customers track agency licenses, qualifications, and appointments in Producer Manager and want to keep this information synchronized with state data through Producer Manager’s automated data reconciliation services, such as Quick Sync Producer or Scheduled Sync. Often, a large agency (“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 synced using the standard method without enabling Branch Office Syncing functionality. In this case you would have separate producer records in Producer Manager 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 a 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 is 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.



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

DISCLAIMER: In Producer Manager, your company currently may 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 based on external system ID is information known only to your company’s project team or licensing staff. Vertafore cannot be responsible for errors resulting from inadvertent changes to records based on mistaken identity.

The Basics of Branch Office Syncs

Branch records are no different from any other firm record other than 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:

- Using the Manage Branch Office link in the upper right hand corner of the Data Reconciliation section on the Review Update Producer page.



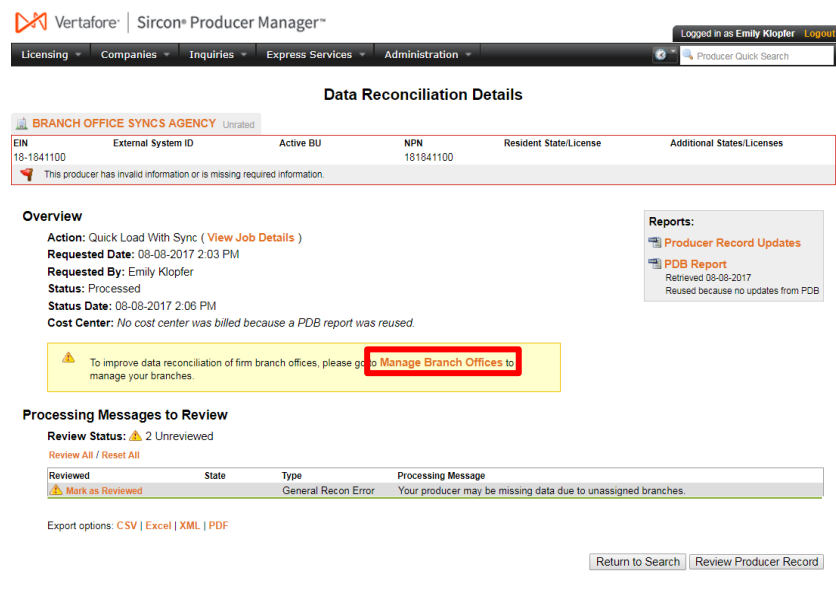
Data Reconciliation

Reconciliation Action	Status	Requested Date	Data Sources	Processing Messages	Action
Quick Sync	Processed	07-20-2017	PDB Report Retrieved 07-10-2017	1 Unreviewed	Modified?
Quick Add	Processed	07-10-2017	PDB Report Retrieved 07-10-2017	1 Unreviewed	

Key: [View PDB Report](#) [View Reconciliation Details](#)

2 data reconciliations found, displaying all data reconciliations.

- A yellow warning message is presented after a branch record is synced if there are PDB Groups that are unassigned. This message includes a link to the Branch Office Licensing Assignments page. Unassigned PDB Groups indicate PDB information that could not be automatically assigned and that has not been manually resolved.



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Logged in as Emily Klopfer Logout

Licensing Companies Inquiries Express Services Administration

Producer Quick Search

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
Mark as Reviewed		General Recon Error	Your producer may be missing data due to unassigned branches.

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

[Return to Search](#) [Review Producer Record](#)

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.

Firm	PDB Group	Business Address	License	License Type	License State	Actions
<input type="checkbox"/> ● BRANCH OFFICE SYNCS AGENCY (GA) <input type="checkbox"/> Ext. ID: Branch 1	24325397	CORDELE, GA 31015	70443	Principal Agency - Resident	GA	Ignore Reassign

Each PDB Group is identified by a PDB Group ID and includes demographic information, such as addresses and aliases, licenses with their associated lines of authority, and 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. To see the other information included in a PDB Group the full PDB Report can be viewed from Producer Manager.

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 amongst multiple different PDB Reports. PDB Groups are identifiers at a State Level on 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.

Default Branches

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. All new mappings will be automatically assigned and synced to the Default Branch record at the time of the sync. On the Branch Office pages, the Default Branch is indicated by a green dot to the left of the firm name. The Default Branch is also identified at the top of each branch office page.

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 can be deleted if it is the only firm with the EIN.

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.

Branch Office Licensing Assignments

NPN: 181841100

EIN: 18-1841100

PM Firm Count: 5

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

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. For example, there are two Branch Agency – Resident licenses in the state of Georgia. 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.

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.

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.

Firm	PDB Group	Business Address	License	License Type	License State	Actions
<input type="checkbox"/> Unassigned	21574137	AMERICUS, GA 31709	105667	Branch Agency - Resident	GA	Ignore Assign
<input type="checkbox"/> Unassigned	22261694	MOULTRIE, GA 31768	113225	Branch Agency - Resident	GA	Ignore Assign

Using Multiple Producer Records vs. Using a Single Producer Record

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

- 1. RECOMMENDED: Multiple Producer Records are created, one for each branch office location that is tracked.**

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 synced onto the assigned branch record and the branch office processing message will no longer appear (until another new branch is added on the PDB).

Firm	PDB Group	Business Address	License	License Type	License State	Actions
<input type="checkbox"/> BRANCH OFFICE SYNC'S AGENCY (GA) Ext. ID: Branch 1	42549990	SAVANNAH, GA 31405				Ignore Reassign
			181578	Branch Agency - Resident	GA	
<input type="checkbox"/> BRANCH OFFICE SYNC'S AGENCY Ext. ID: Branch 5	22422373	BRUNSWICK, GA 31520				Ignore Reassign
			113670	Branch Agency - Resident	GA	
<input type="checkbox"/> BRANCH OFFICE SYNC'S AGENCY Ext. ID: Branch 3	21574137	AMERICUS, GA 31709				Ignore Reassign
			105667	Branch Agency - Resident	GA	
<input type="checkbox"/> BRANCH OFFICE SYNC'S AGENCY (GA) Ext. ID: Branch 2	31106990	COLUMBUS, GA 31904				Ignore Reassign
			126765	Branch Agency - Resident	GA	
<input type="checkbox"/> BRANCH OFFICE SYNC'S AGENCY Ext. ID: Branch 4	22261694	MOULTRIE, GA 31768				Ignore Reassign
			113225	Branch Agency - Resident	GA	

1. 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 licenses 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).

Firm	PDB Group	Business Address	License	License Type	License State	Actions
<input type="checkbox"/> Ignored	43924392	COLUMBUS, GA 31903				Assign
			186444	Branch Agency - Resident	GA	
<input type="checkbox"/> Ignored	44340339	VIENNA, GA 31092				Assign
			187539	Branch Agency - Resident	GA	
<input type="checkbox"/> Ignored	44419255	DAWSON, GA 39842				Assign
			187845	Branch Agency - Resident	GA	
<input type="checkbox"/> Ignored	44419264	LAGRANGE, GA 30241				Assign
			187844	Branch Agency - Resident	GA	
<input type="checkbox"/> BRANCH OFFICE SYNC'S AGENCY	22261694	MOULTRIE, GA 31768				Ignore Reassign
			113225	Branch Agency - Resident	GA	

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 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.

Firm	PDB Group	Business Address	License	License Type	License State	Actions
<input type="checkbox"/> ● BRANCH OFFICE SYNCS AGENCY (GA)	24325397	CORDELE, GA 31015				Ignore Reassign
<input type="checkbox"/> <div style="border: 1px solid red; padding: 2px; display: inline-block;"> Ext. ID: Branch 1 Main Office </div>			70443	Principal Agency - Resident	GA	

Enabling Branch Office Syncing

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 Function

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 is selected and the box is checked.

- Add/Activate License and Qualification
- Advanced Producer Search
- Branch Office Assignments
- Company Relationships
- Create a new PX Request
- Data Reconciliation Details
- Delete Comments

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.

Identify Firm Default Branch

In order 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 Manager 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 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:

A. 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.

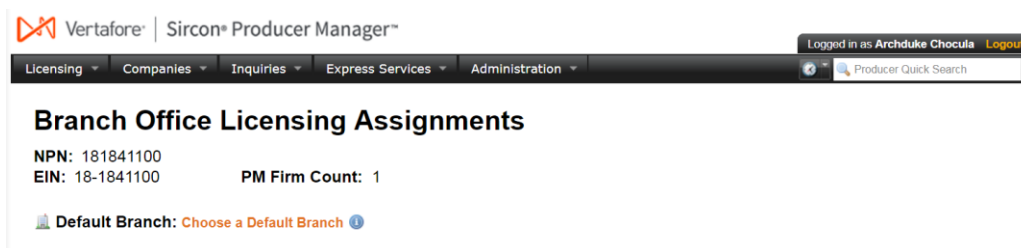
B. The first record for an EIN is loaded into the system after Branch Office Syncing was enabled

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.

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

a) 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. 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.



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Logged in as Archduke Chocula Logout

Licensing Companies Inquiries Express Services Administration

Producer Quick Search

Branch Office Licensing Assignments

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

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

b) 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

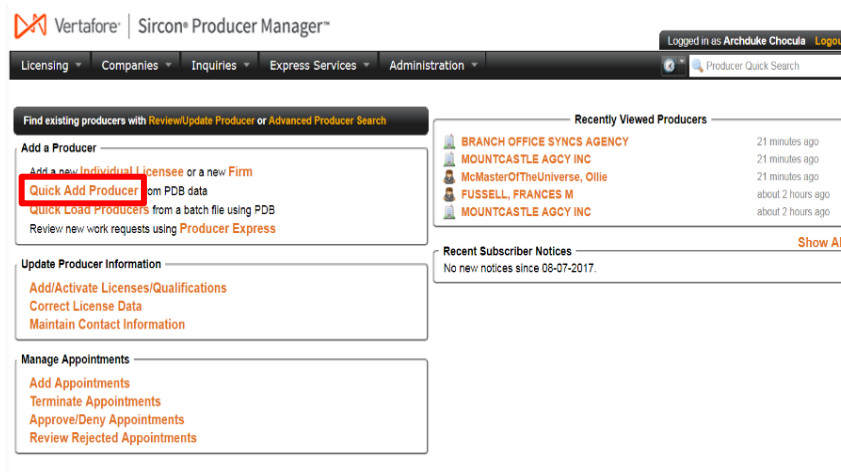
Adding the first Firm Branch Office record for an EIN into the system can be done using any method of creating a record. Therefore, for those who only track a single branch record, any approach to adding firm records can be used. However, the only method to add multiple firm records with the same EIN is using Quick Load.

When adding a “mega-firm” to Producer Manager 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 at that point a user can either create more firm records or assign the PDB Groups to the record that was just created. Creating more firm records is a simple matter of Quick Loading more producer records with the same EIN.

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.

Quick Adding a Branch Office Record

On the Producer Manager Home page, in the Add a Producer section click the Quick Add Producer link. The Quick Add Producer page will open.



The screenshot shows the Vertafore Sircon Producer Manager interface. The top navigation bar includes 'Licensing', 'Companies', 'Inquiries', 'Express Services', and 'Administration'. The user is logged in as 'Archduke Chocula'. The main content area is divided into several sections:

- Find existing producers with Review/Update Producer or Advanced Producer Search**
- Add a Producer**
 - Add a new Individual Licensee or a new Firm
 - Quick Add Producer** from PDB data (highlighted with a red box)
 - Quick Load Producers from a batch file using PDB
 - Review new work requests using Producer Express
- Update Producer Information**
 - Add/Activate Licenses/Qualifications
 - Correct License Data
 - Maintain Contact Information
- Manage Appointments**
 - Add Appointments
 - Terminate Appointments
 - Approve/Deny Appointments
 - Review Rejected Appointments
- Recently Viewed Producers**
 - BRANCH OFFICE SYNC AGENCY (21 minutes ago)
 - MOUNTCASTLE AGCY INC (21 minutes ago)
 - McMasterOfTheUniverse, Ollie (21 minutes ago)
 - FUSSELL, FRANCES M (about 2 hours ago)
 - MOUNTCASTLE AGCY INC (about 2 hours ago)
- Recent Subscriber Notices**
 - No new notices since 08-07-2017.

On the Quick Add Producer page, in the Producer Type field click to the Firm radio button. In the Name field, enter the name of the mega-agency. In the EIN field, enter the mega-agency’s federal tax ID (Employer Identification Number). A hyphen is optional. Verify that the Load data from PDB checkbox is check marked. Finally, click the Search button. Producer Manager will look up the mega-firm’s record on the national Producer Database (PDB). When it is finished, the Quick Add Producer page will refresh with additional fields.

Quick Add Producer

Producer Type : Firm Individual Licensee ⓘ
 Name EIN Load data from PDB

The system verifies the existence of the mega-firm’s record on the PDB. It also displays its license residence state and the date on which the PDB last was updated with state compliance information. Ignore the state list box. Optionally, you may select a cost center from the dropdown menu to assign the cost of the Quick Add operation to a specific accounting bucket. When you are finished, click the Add Producer From PDB button. The Data Reconciliation Details page will open.

Quick Add Producer

Producer Type : Firm Individual Licensee ⓘ
 Name EIN Load data from PDB

1 PDB entry was found:

Name	Resident State	Last Updated
<input checked="" type="radio"/> BRANCH OFFICE SYNCS AGENCY	Pennsylvania	08-15-2017

Select the state(s) for which you want to load PDB licensing and appointment data:

Alabama
 Alaska
 Arizona
 Arkansas
 California
 Colorado

- Data from a producer's resident states will always be loaded.
- If no states are selected, all PDB data will be loaded.

Optionally, you may bill the cost of the PDB report to one of the following cost centers:


Instead of loading producer data from a PDB report, I would like to [create this firm manually](#).

The Data Reconciliation Details page displays the position your request to Quick Add the mega-firm holds in the queue of automated data reconciliation requests. You may click the Refresh button as needed to update the page. Eventually the Quick Add operation will be completed, and the Data Reconciliation Details page will refresh to show the results of the operation.

Data Reconciliation Details

BRANCH OFFICE SYNCs

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


 **Reconciliation Pending**
This reconciliation request is currently number 1 in the [Data Reconciliation Queue](#). Once this request begins processing, this report will be updated. Please check back later.


Overview

Action: Quick Add
Requested Date: 08-15-2017 12:00 PM
Requested By: Archduke Chocula
Status: Pending
Status Date: 08-15-2017 12:00 PM

On the Data Reconciliation Details page there will be a processing message any time a sync identifies there are PDB Groups that are not assigned to a producer record. If there are unassigned PDB Groups, an additional yellow warning message will be present that will provide a link to the Branch Office Licensing Assignments page where unassigned PDB Groups can be either assigned or ignored. Once all the PDB Groups are in either an assigned or ignored status the yellow warning message will no longer appear.

Data Reconciliation Details

 **BRANCH OFFICE SYNCs AGENCY** Unrated


EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
18-1841100			181841100		AL / 416295
 This producer has invalid information or is missing required information.					

Overview

Action: Quick Add
Requested Date: 08-15-2017 12:00 PM
Requested By: Archduke Chocula
Status: Processed
Status Date: 08-15-2017 12:01 PM
Cost Center: No cost center was associated with this request.

Reports:




-  [Producer Record Updates](#)
-  [PDB Report](#)
Retrieved 08-15-2017

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

Processing Messages to Review

Review Status:  3 Unreviewed

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

Reviewed	State	Type	Processing Message
 Mark as Reviewed		General Recon Error	Your producer may be missing data due to unassigned branches.
 Mark as Reviewed	Alabama		Appointment: Fake Company (11223) does not support the Casualty appointment in Alabama
 Mark as Reviewed	Alabama		Appointment: Fake Company (11223) does not support the Property appointment in Alabama

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

Automatically Resolved Data Issues

Alabama

License Type : Business Entity Producer **License Number :** 416295

Qualification	Message
Casualty	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.
Casualty	Active PDB Qualification status date is different than its original issue date.
Life	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.
Life	Active PDB Qualification status date is different than its original issue date.
Motor Club	Active PDB Qualification status date is different than its original issue date.
Motor Club	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.
Property	Active PDB Qualification status date is different than its original issue date.
Property	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.

South Carolina

License Type : Agency **License Number :** 184868

Qualification	Message
None	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.
None	Missing Qualification original issue date.

[Review Producer Record](#)

Now that we have Quick Added a branch record we are ready to start managing Branches and/or adding more firm branch records with the same EIN.

Quick Loading Multiple Branch Office Records

On the Producer Manager Home page, in the Add a Producer section click the Quick Load Producer link. The Quick Add Load Producer page will open.

Vertafore | Sircon® Producer Manager Test for 10795

Logged in as Archduke Chocula [Logout](#)

Licensing Companies Inquiries Express Services Administration Producer Quick Search

Find existing producers with [Review/Update Producer](#) or [Advanced Producer Search](#)

Add a Producer

Add a new [Individual Licensee](#) or a new [Firm](#)

[Quick Add Producer](#) from PDB data

Quick Load Producers from a batch file using PDB

Review new work requests using [Producer Express](#)

Update Producer Information

[Add/Activate Licenses/Qualifications](#)

[Correct License Data](#)

[Maintain Contact Information](#)

Manage Appointments

[Add Appointments](#)

[Terminate Appointments](#)

[Approve/Deny Appointments](#)

[Review Rejected Appointments](#)

Recently Viewed Producers

BRANCH OFFICE SYNCS AGENCY	21 minutes ago
MOUNTCASTLE AGCY INC	21 minutes ago
McMasterOfTheUniverse, Ollie	21 minutes ago
FUSSELL, FRANCES M	about 2 hours ago
MOUNTCASTLE AGCY INC	about 2 hours ago

[Show All](#)

Recent Subscriber Notices

No new notices since 08-07-2017.

In order to add multiple branch records with the same EIN select the Quick Load with the Add Only option for Step 1.

STEP 1

Select the type of Quick Load you want:

Add Only to add new records in bulk. Requests for existing records will result in processing errors.

Add or Sync to add new records and update existing producer records in bulk.

Then in Step 2 create a CSV file, according to the file requirements described below, and then use the Choose File button to upload the file on the page. If it is the first time adding producer records for an EIN then the first row in the Quick Load file will be the Default Branch.

STEP 2

Select the file identifying the producers to be processed. It must have the following characteristics:

- comma-delimited
- max file size of 2MB
- maximum of 1080 producers
- meet the [file format requirements](#)

No file chosen

The first three fields are required and should follow the following requirements:

- A. Producer Type = AGY
- B. NAME has at least the first 3 letters of the firm's name from the PDB and also differs from every other name with that EIN in the current CSV file.

Note: If demographic information is synced from the PDB, then this name will be overwritten during the sync.
- C. TIN = EIN of the branch records you are adding

It is recommended that you include External System ID Information. This helps prevent the manual effort needed to go individually to each records Review/Update page and add External System ID.

- D. External System ID Type Code = the External System ID type used to identify and differentiate between branch office records
- E. External System ID = the External System ID (often from another system) used to identify and differentiate between branches

```

1 AGY,BRANCH OFFICE SYNCS AGENCY 1,#####,ESID Type,Branch 1,, ,YYY
2 AGY,BRANCH OFFICE SYNCS AGENCY 2,#####,ESID Type,Branch 2,, ,YYY
3 AGY,BRANCH OFFICE SYNCS AGENCY 3,#####,ESID Type,Branch 3,, ,YYY
4 AGY,BRANCH OFFICE SYNCS AGENCY 4,#####,ESID Type,Branch 4,, ,YYY
5 AGY,BRANCH OFFICE SYNCS AGENCY 5,#####,ESID Type,Branch 5,, ,YYY
  
```

Ignore Step 3 and proceed to loading the file by continuing to the Quick Load Producer Page.

Quick Load Producers

Confirm File Contents

✔ 5 producers were found in **Branch Office QL.txt** and will be loaded from PDB.

Licensing and appointment data will be loaded from all states.

Upload the Producers and then view the current Processing Status to navigate to the Processing Results. After the row in the Quick Load file has completed processing and moved to either the Processed or Error status continue to the Data Reconciliation Details page using the Actions on the right on the screen.

Processing Results

Processing results for the selected producer data source:

Filename	Source	Status	Run Date	Staff Member
Branch Office QL.txt	Quick Load Producers	Running	08-14-2017	Archduke Chocula

⚠ While the data source is processing, the results displayed may be incomplete.

Filter Criteria Clear

Producer Type
Last Name/Firm Name
Status
View Return

Name	Producer Type	Status	Processing Messages	Actions
BRANCH OFFICE SYNCS AGENCY	Firm	Pending		
BRANCH OFFICE SYNCS AGENCY	Firm	Pending		
BRANCH OFFICE SYNCS AGENCY	Firm	Pending		
BRANCH OFFICE SYNCS AGENCY	Firm	Pending		
BRANCH OFFICE SYNCS AGENCY	Firm	Pending		


Key: View Reconciliation Details


5 results found, displaying all results.

After reaching the Data Reconciliation Details page, if there are any unassigned branches then the Branch Office Processing message and a yellow warning message with a link to the Branch Office Licensing Assignments page is displayed. This link can be used to navigate to the pages used to manage Branch Office Syncs.

Now that we have Quick Loaded one or more branch records we are ready to start managing branches.

Data Reconciliation Details

 **BRANCH OFFICE SYNCS AGENCY** Unrated


EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
18-1841100			181841100		AL / 416295
 This producer has invalid information or is missing required information.					

Overview

Action: Quick Add
Requested Date: 08-15-2017 12:00 PM
Requested By: Archduke Chocula
Status: Processed
Status Date: 08-15-2017 12:01 PM
Cost Center: No cost center was associated with this request.

Reports:




-  [Producer Record Updates](#)
-  [PDB Report](#)
Retrieved 08-15-2017

 To improve data reconciliation of firm branch offices, please go to Manage Branch Offices to manage your branches.

Processing Messages to Review

Review Status:  3 Unreviewed

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

Reviewed	State	Type	Processing Message
 Mark as Reviewed		General Recon Error	Your producer may be missing data due to unassigned branches.
 Mark as Reviewed	Alabama		Appointment: Fake Company (11223) does not support the Casualty appointment in Alabama
 Mark as Reviewed	Alabama		Appointment: Fake Company (11223) does not support the Property appointment in Alabama

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

Automatically Resolved Data Issues

Alabama

License Type : Business Entity Producer **License Number :** 416295

Qualification	Message
Casualty	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.
Casualty	Active PDB Qualification status date is different than its original issue date.
Life	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.
Life	Active PDB Qualification status date is different than its original issue date.
Motor Club	Active PDB Qualification status date is different than its original issue date.
Motor Club	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.
Property	Active PDB Qualification status date is different than its original issue date.
Property	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.

South Carolina

License Type : Agency **License Number :** 184868

Qualification	Message
None	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.
None	Missing Qualification original issue date.

[Review Producer Record](#)

NOTE: The procedures outlined in this document assume that the ORG_UNIQ_EIN business rule in your company's configuration of Producer Manager 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.

Scheduled Syncs for Branch Office Records

For multiple branch office records that share an EIN and a PDB Report it is recommended that you configure these records to have the same sync schedule. This ensures the records are synced with the most up to date information, across all branches. In addition, syncing all the records on the same date is the most cost effective because only one PDB report is pulled that is shared for each of the synced records.

Adding External System Identifiers to Firm Records

Navigate to the Review/Update page of the record to which an External System ID needs to be added.

External Sys IDs				
External System Type	External System Identifier	Business Unit	Primary	Inactive
AGENCY_ID	000001		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Add/Update/Delete External System Identifiers				

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. 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. If you do not see the appropriate External System Type, contact your system administrator or Vertafore representative. When you are finished, click the Save and Return button.

Maintain External System Identifiers

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

EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
18-1841100			181841100		<input type="checkbox"/> AL / 416295
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"/>	AGENCY_ID	000001		<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"/> Generate ID	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Save			Return	Save and Return

Managing Branch Offices

Branch Office Syncing 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 Syncing can be managed from the Branch Office Licensing Assignment page. Each PDB Group should be either assigned to the appropriate producer record in order to have the associated PDB information sync onto the record or be ignored in order to prevent the information from being synced onto any producer record.

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 syncs will use the assignments going forward.

Branch Office Licensing Assignments

NPN: 181841100
EIN: 18-1841100

PM Firm Count: 5

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

Changes to the Branch Office Licensing Assignments will not take effect until the next scheduled sync is run for the updated firm or you choose to manually sync the updates with the producer record.

[Sync All Firms with this EIN](#)

SHOW: All PDB Groups | All Address States | All License Types | All License States
Any Assigned Firm

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

Firm	PDB Group	Business Address	License	License Type	License State	Actions
Unassigned	21574137	AMERICUS, GA 31709	105667 (AC)	Branch Agency - Resident	GA	Ignore Assign
Unassigned	22261694	MOULTRIE, GA 31768	113225 (AC)	Branch Agency - Resident	GA	Ignore Assign
Unassigned	24325401	VIDALIA, GA 30474	74135 (AC)	Branch Agency - Resident	GA	Ignore Assign

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

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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 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 the sync. In order to reflect changes in the PDB Group assignments on the producer record, make sure to sync the record.

Changes to the licensing assignments that result in a license, qualification, or appointment or other PDB information no longer being synced 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 can be made in two ways:

1. **Users can manually assign any PDB Group to any branch record (with the EIN) as long as 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.

Firm	PDB Group	Business Address	License	License Type	License State	Actions
<input type="checkbox"/> ● BRANCH OFFICE SYNCS AGENCY (GA) Ext. ID: Branch 1 Main Office	24325397	CORDELE, GA 31015	70443	Principal Agency - Resident	GA	Ignore Reassign

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.

Branch Office Licensing Assignments

NPN: 181841100

EIN: 18-1841100

PM Firm Count: 5

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

Search for a Firm to Assign a Branch

Please enter at least one of the search criteria below:

Firm Name	<input type="text"/>	Active Business Unit	<input type="text"/>
EIN	<input type="text" value="181841100"/>	NPN	<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

Name	City	State	License Summary	
BRANCH OFFICE SYNCS AGENCY (GA) EIN: 18-1841100 Ext. ID: Branch 2	COLUMBUS	GA	2 States, 2 Licenses	Select Firm
● BRANCH OFFICE SYNCS AGENCY (GA) EIN: 18-1841100 Ext. ID: Branch 1	SAVANNAH	GA	3 States, 3 Licenses	Select Firm
BRANCH OFFICE SYNCS AGENCY EIN: 18-1841100 Ext. ID: Branch 5				Select Firm
BRANCH OFFICE SYNCS AGENCY EIN: 18-1841100 Ext. ID: Branch 3				Select Firm
BRANCH OFFICE SYNCS AGENCY EIN: 18-1841100 Ext. ID: Branch 4				Select Firm

Displaying 1 - 5 (of 5 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. 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 sync 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.

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 a sync, 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 syncs, 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 a sync, the updates to the producer record will be effective immediately and there is no need to initiate another sync 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 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.

Ignoring PDB Groups

Ignoring a PDB Group prevents the information associated with the group from being synced with any Producer Manager 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.

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 syncing. This will differentiate the PDB Groups that are ignored from the PDB Groups that are new and need manual intervention. 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 syncing onto any record.

<input type="checkbox"/> Ignored	21574137	AMERICUS, GA 31709			Assign
			105667 (AC)	Branch Agency - Resident	GA

Updating the Default Branch

A Default Branch is the Producer Manager 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.

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



Vertafore® | Sircon® Producer Manager™

Logged in as Emily Klopfer [Logout](#)

Licensing ▾ Companies ▾ Inquiries ▾ Express Services ▾ Administration ▾

Producer Quick Search

Branch Office Licensing Assignments

NPN: 181841100
EIN: 18-1841100 PM Firm Count: 5

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

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

Branch Office Licensing Assignments

NPN: 181841100

EIN: 18-1841100

PM Firm Count: 5

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

Search for a Firm to Set as Default Branch

Please enter at least one of the search criteria below:

Firm Name	<input type="text"/>	Active Business Unit	<input type="text"/>
EIN	<input type="text" value="181841100"/>	NPN	<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:

Displaying 1 - 5 (of 5 matching records) Page 1 of 1

Name	City	State	License Summary	
BRANCH OFFICE SYNCS AGENCY (GA) EIN: 18-1841100 Ext. ID: Branch 2	COLUMBUS	GA	2 States, 2 Licenses	Set Default
● BRANCH OFFICE SYNCS AGENCY (GA) EIN: 18-1841100 Ext. ID: Branch 1	SAVANNAH	GA	3 States, 3 Licenses	Set Default
BRANCH OFFICE SYNCS AGENCY EIN: 18-1841100 Ext. ID: Branch 5				Set Default
BRANCH OFFICE SYNCS AGENCY EIN: 18-1841100 Ext. ID: Branch 3				Set Default
BRANCH OFFICE SYNCS AGENCY EIN: 18-1841100 Ext. ID: Branch 4				Set Default

Displaying 1 - 5 (of 5 matching records) Page 1 of 1

After clicking Set Default, you will be directed to the Select Default confirmation page. This page will provide relevant warning and informational messages depending on the EINs specific data scenario at the top of the screen. Below this is a table that shows all the PDB Groups that will be automatically assigned to the chosen default branch. 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 newly selected Default.

Branch Office Licensing Assignments

NPN: 181841100

EIN: 18-1841100

PM Firm Count: 5

Selected Default Branch: **BRANCH OFFICE SYNCNS AGENCY**

WARNING: We are about to start applying Branch Office License Assignments during a sync. This action might result in the inactivation of licensing information on existing records that will appear in the Outbound Data Feed.

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.

SHOW

PDB Group	Business Address	License	License Type	License State
24325397	CORDELE, GA 31015	This PDB Group has 1 hidden license because of disabled Use Indicators.		
33081989	COLUMBUS, GA 31904	416295(AC)	Business Entity Producer	AL
38211577	SAVANNAH, GA 31405	184868(AC)	Agency	SC

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

Page 1 of 1

NOTE: The confirmation page only displays information for PDB Groups that are already known by Producer Manager as the result of a sync. It is not able to show PDB Groups that have not yet been synced 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.

PDB Group	Business Address	License	License Type	License State
		184868(AC)	Agency	SC

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

Page 1 of 1

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

Branch Office Licensing Assignments

NPN: 181841100
EIN: 18-1841100 **PM Firm Count:** 5

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

Changes to the Branch Office Licensing Assignments will not take effect until the next scheduled sync is run for the updated firm or you choose to manually sync the updates with the producer record.

[Sync All Firms with this EIN](#)

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

Any Assigned Firm

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

PDB Reports

PDB Reports are shared between branch records. When syncing more than one branch record, no additional PDB Report cost is incurred. All branch records with the same EIN will use the same, most up to date, PDB report when syncing. If the PDB Report is not up to date, then the first branch record that is synced when new data is available will pull the new report and all other records will use this report.

Additionally, PDB Group ID has been added to Producer Manager PDB Report functionality. A PDB Report that can be filtered by PDB Group is available on the Branch Office Licensing Assignments. To filter a PDB report by PDB Group, select which PDB Groups you want on the PDB Report and then generate the report using the option on the top of the page. If no PDB Groups are selected then all the PDB Groups will be included in the PDB Report.

Branch Office Licensing Assignments

NPN: 181841100
EIN: 18-1841100

PM Firm Count: 5

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

Changes to the Branch Office Licensing Assignments will not take effect until the next scheduled sync is run for the updated firm or you choose to manually sync the updates with the producer record.

[Sync All Firms with this EIN](#)

SHOW

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

Queuing Branch Office Syncs

Branches need to be separately added to the sync queue. In other words syncing one branch record does not mean all the other branch records will be synced.

To put all the producer records for an EIN on the queue, use the Sync All 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 synced ensures that after making changes to the PDB Group assignments any changes will be reflected on the effected producer records.

Branch Office Licensing Assignments

NPN: 181841100
EIN: 18-1841100

PM Firm Count: 1

● **Default Branch:** BRANCH OFFICE SYNCS AGENCY EIN: 18-1841100 [Change Default Branch](#) ⓘ

Changes to the Branch Office Licensing Assignments will not take effect until the next scheduled sync is run for the updated firm or you choose to manually sync the updates with the producer record.

[Sync All Firms with this EIN](#)

SHOW

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.

<input type="checkbox"/>	● BRANCH OFFICE SYNCS AGENCY	24325397	CORDELE, GA 31015	Ignore Reassign
<i>This PDB Group has 1 hidden license because of disabled Use Indicators.</i>				