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YOUR
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SIRCON FOR CARRIERS

Data Fixes in
Producer Central

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Overview

Introduction and Background

If you have administrative privileges, you can use the **Data Fix** functionality to correct inaccurate or missing data in Producer Central.

Some examples of data you can correct with data fixes are:

- Producer data
- Licensing data
- Appointment data
- Association data

You can also delete licensing data from producer records or delete producer records entirely. The **Data Fix** functionality also allows you to review producer records with missing required information.

Reviewing and resolving data fixes is one of the steps that falls under the **Maintain Producer Data** process. It is important to regularly review the Producers with Missing Information to ensure producer data remains accurate.

If you encounter errors with licensing data or with appointment/qualification/state association dates, you should use data fixes to update the producer record.

Maintain Producer Data



Note: Click the links to open quick guides that cover how to maintain producer data using [Data Reconciliations](#), [Producer Record Updates](#), or [Bulk Transactions](#).

Section: Overview

What will be covered?

In this quick guide, we will review how to perform all the data fix functions, including how to:

- Correct License Data
- Correct Qualification Dates
- Correct Appointment Dates
- Correct State Association Dates
- Review Producers with Missing Information
- Delete Producers
- Delete Licensing Data by State

Who should use this document?

Users with administrative access to Producer Central that need to correct data for individual and firm producers.

When should you use this document?

Use this document when you need to complete data fixes in Producer Central.

It is recommended that your company reviews the required data fixes and completes them on a regular basis. This helps ensure your producer data is accurate and that your company remains in compliance with state requirements.

Note: The exact timing of when to perform data fixes depends on the size of your organization and the number of producers you need to manage. Contact your Vertafore support contact if you need recommendations about how often your company should complete this activity.

Producers with Missing Information

Use the *Producers with Missing Information* page to review a list of producer records that lack specific data types. Producer Central will display entries on this page if a producer is missing required data or if the data is in the incorrect format. The required data types are based on your company's unique configuration.

When Vertafore implements your company's instance of Producer Central, Vertafore can configure certain data types to be "required" based on your company's business requirements.

When a producer record lacks one or more required data types, the record is considered incomplete and compliance transactions, such as state appointments or appointment terminations, cannot be submitted.

Vertafore can configure your company's instance of Producer Central to require that producer records contain:

- At least one **Business Unit**
- Specific Individual and/or Firm **Address Types**
- Specific Individual and/or Firm **Phone Types**
- A **Birth Date** (for Individuals)
- At least one **Individual Association** (for Firms)
- At least one **Agreement**
- At least one **External System ID**

The data fixes required for your organization are based on your company's unique configuration.

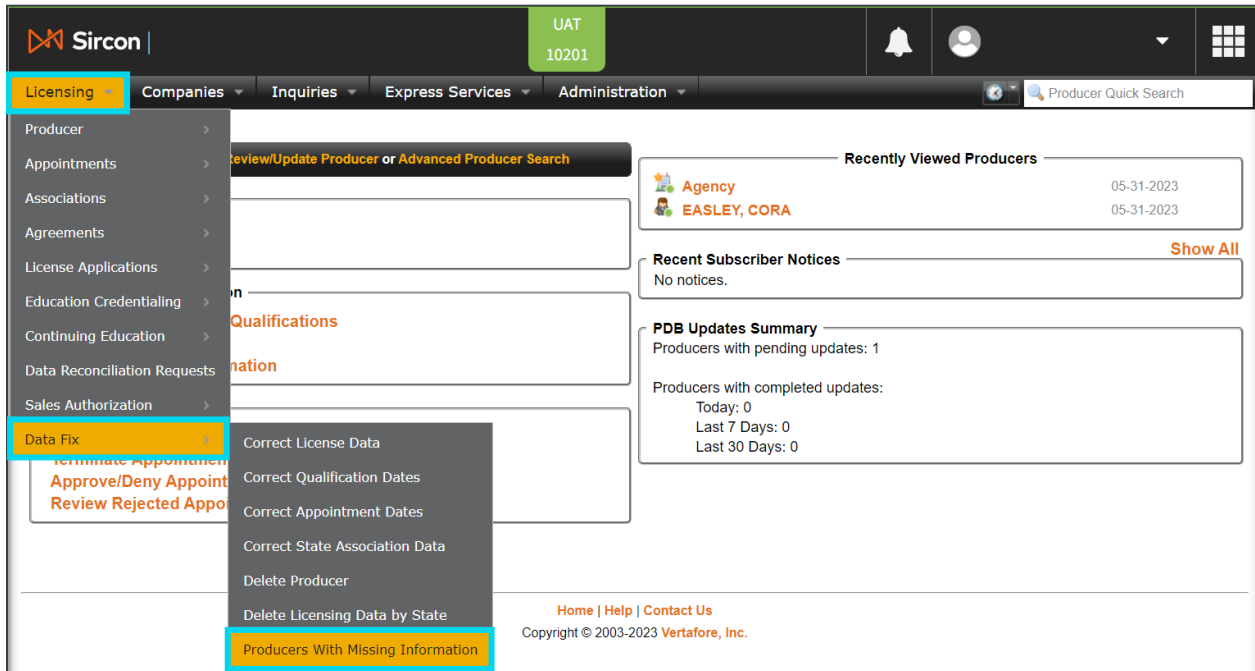
In this section, we will discuss how to perform data updates for each scenario.

Note: You can use the [Table of Contents](#) to navigate to learn how to update a specific data type.

Section: Producers with Missing Information

Navigate to Producers with Missing Information

1. From the **Licensing** menu, select **Data Fix** and then select **Producers with Missing Information**.



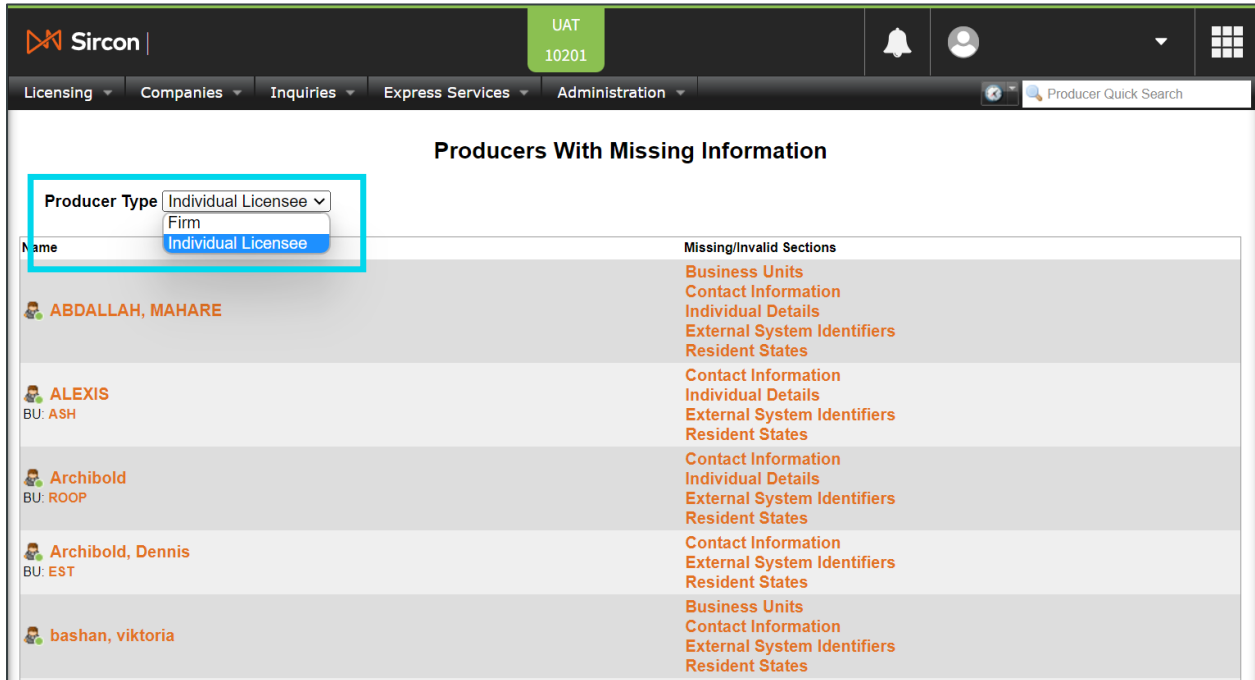
The screenshot shows the Vertafore user interface. At the top, there is a navigation bar with the 'Licensing' menu highlighted. A dropdown menu is open under 'Licensing', and the 'Data Fix' option is selected. A secondary dropdown menu is visible under 'Data Fix', with 'Producers With Missing Information' highlighted at the bottom. The main content area shows a sidebar with various options like 'Review/Update Producer or Advanced Producer Search', 'Qualifications', and 'Recently Viewed Producers'.

2. You will see a list of all the Producers in your organization that contain missing information.
3. The first column shows the **Name** of each producer and a link to the producer record.
4. The next column lists the **Missing / Invalid Sections** which contains links to pages where you can add/update information that is missing on the producer record.

Producers With Missing Information	
Producer Type <input type="text" value="Individual Licensee"/>	
Name	Missing/Invalid Sections
 ABDALLAH, MAHARE	Business Units Contact Information Individual Details External System Identifiers Resident States
 ALEXIS BU: ASH	Contact Information Individual Details External System Identifiers Resident States
 Archibold BU: ROOP	Contact Information Individual Details External System Identifiers Resident States
 Archibold, Dennis BU: EST	Contact Information External System Identifiers Resident States

Section: Producers with Missing Information

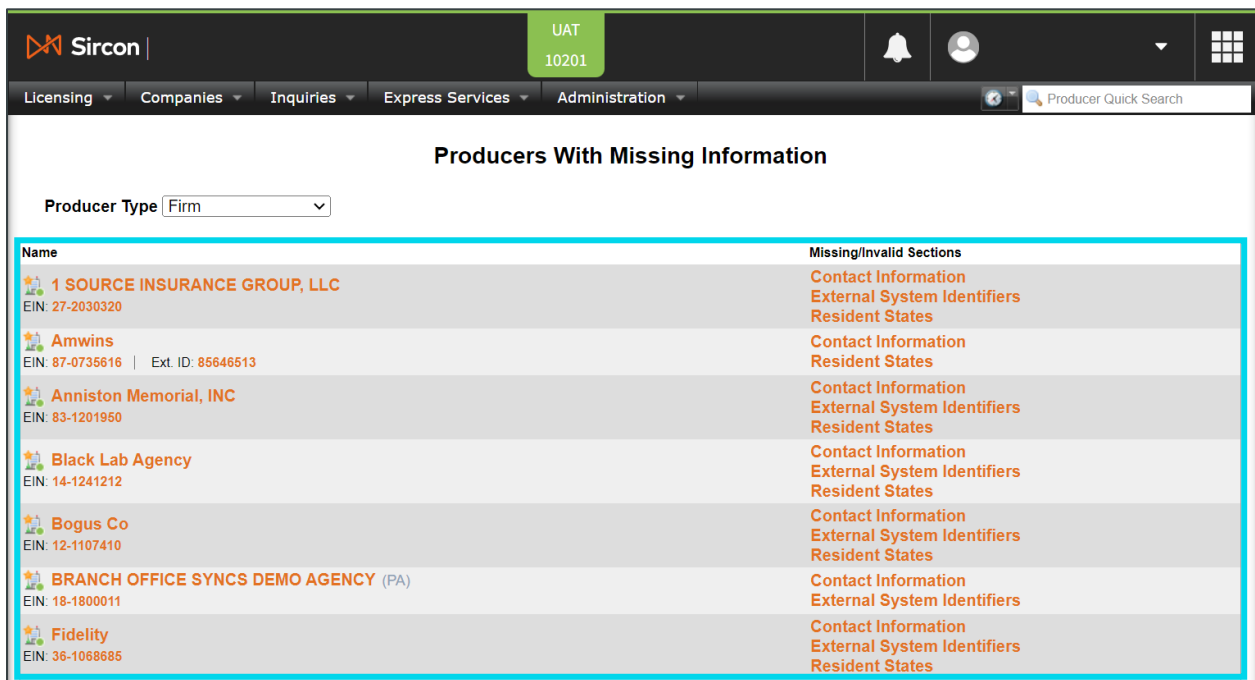
- Use the **Producer Type** dropdown to display a list of the **Individual Licensees** or **Firms** with missing information.



The screenshot shows the Sircon application interface. At the top, there is a navigation bar with the Sircon logo, a user profile 'UAT 10201', and a search bar labeled 'Producer Quick Search'. Below the navigation bar, the main heading is 'Producers With Missing Information'. A dropdown menu for 'Producer Type' is open, showing 'Individual Licensee' selected and 'Firm' as an option. Below the dropdown is a table with two columns: 'Name' and 'Missing/Invalid Sections'. The table lists several producers with their names and the specific sections that are missing or invalid for each.

Name	Missing/Invalid Sections
ABDALLAH, MAHARE	Business Units Contact Information Individual Details External System Identifiers Resident States
ALEXIS BU: ASH	Contact Information Individual Details External System Identifiers Resident States
Archibold BU: ROOP	Contact Information Individual Details External System Identifiers Resident States
Archibold, Dennis BU: EST	Contact Information External System Identifiers Resident States
bashan, viktoria	Business Units Contact Information External System Identifiers Resident States

- The list of **Firms** with missing information functions the same as the **Individual Licensees** list.







The screenshot shows the Sircon application interface. At the top, there is a navigation bar with the Sircon logo, a user profile 'UAT 10201', and a search bar labeled 'Producer Quick Search'. Below the navigation bar, the main heading is 'Producers With Missing Information'. A dropdown menu for 'Producer Type' is set to 'Firm'. Below the dropdown is a table with two columns: 'Name' and 'Missing/Invalid Sections'. The table lists several firms with their names and the specific sections that are missing or invalid for each.

Name	Missing/Invalid Sections
1 SOURCE INSURANCE GROUP, LLC EIN: 27-2030320	Contact Information External System Identifiers Resident States
Amwins EIN: 87-0735616 Ext. ID: 85646513	Contact Information Resident States
Anniston Memorial, INC EIN: 83-1201950	Contact Information External System Identifiers Resident States
Black Lab Agency EIN: 14-1241212	Contact Information External System Identifiers Resident States
Bogus Co EIN: 12-1107410	Contact Information External System Identifiers Resident States
BRANCH OFFICE SYNC S DEMO AGENCY (PA) EIN: 18-1800011	Contact Information External System Identifiers
Fidelity EIN: 36-1068685	Contact Information External System Identifiers Resident States

Section: Producers with Missing Information

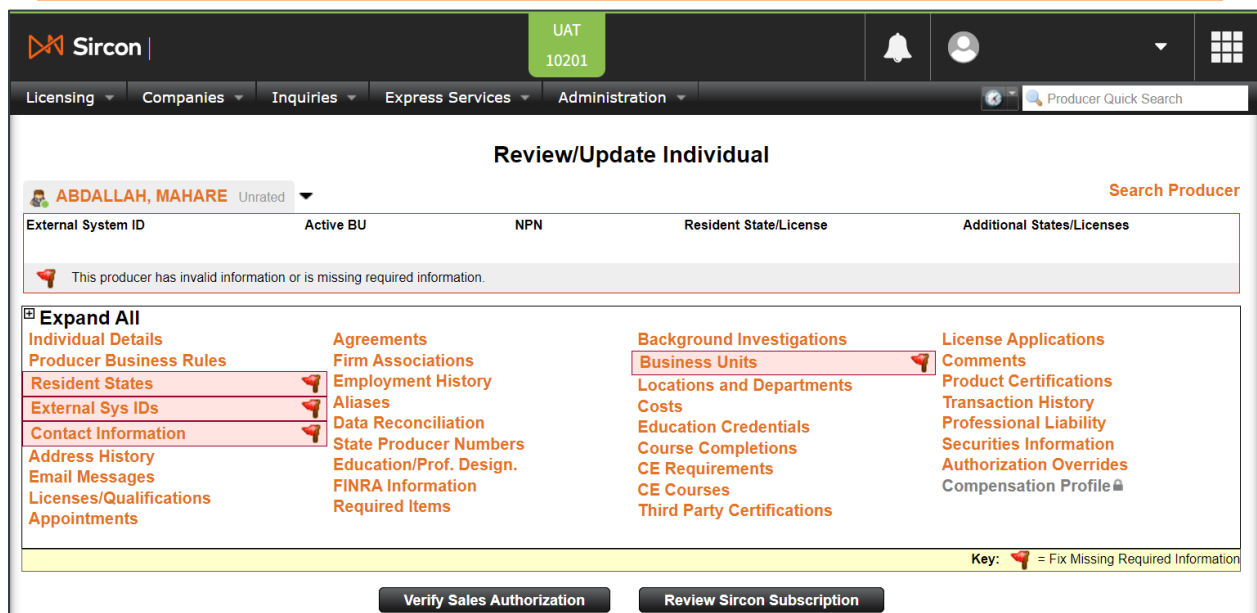
- Click the **Producer Name** to navigate to the individual producer record.

Producers With Missing Information	
Producer Type: Individual Licensee	
Name	Missing/Invalid Sections
 ABDALLAH, MAHARE	<ul style="list-style-type: none"> Business Units Contact Information Individual Details External System Identifiers Resident States
 ALEXIS BU: ASH	<ul style="list-style-type: none"> Contact Information Individual Details External System Identifiers Resident States
 Archibold BU: ROOP	<ul style="list-style-type: none"> Contact Information Individual Details External System Identifiers Resident States
 Archibold, Dennis BU: EST	<ul style="list-style-type: none"> Contact Information External System Identifiers Resident States
 bashan, viktor	<ul style="list-style-type: none"> Business Units Contact Information External System Identifiers Resident States

- In the producer record you will see a **Missing Required Information** (🚩) flag next to any section that contains missing information.

Note: In this guide, we will cover how to add missing information using the **Producers with Missing Information** data fix.

For more information about how to update missing information from an individual producer record, refer to the [Maintain Producer Records Quick Guide](#).



Review/Update Individual

ABDALLAH, MAHARE Unrated

External System ID Active BU NPN Resident State/License Additional States/Licenses

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

Expand All

Individual Details	Agreements	Background Investigations	License Applications
Producer Business Rules	Firm Associations	Business Units 🚩	Comments
Resident States 🚩	Employment History	Locations and Departments	Product Certifications
External Sys IDs 🚩	Aliases	Costs	Transaction History
Contact Information 🚩	Data Reconciliation	Education Credentials	Professional Liability
Address History	State Producer Numbers	Course Completions	Securities Information
Email Messages	Education/Prof. Design.	CE Requirements	Authorization Overrides
Licenses/Qualifications	FINRA Information	CE Courses	Compensation Profile
Appointments	Required Items	Third Party Certifications	

Key: 🚩 = Fix Missing Required Information

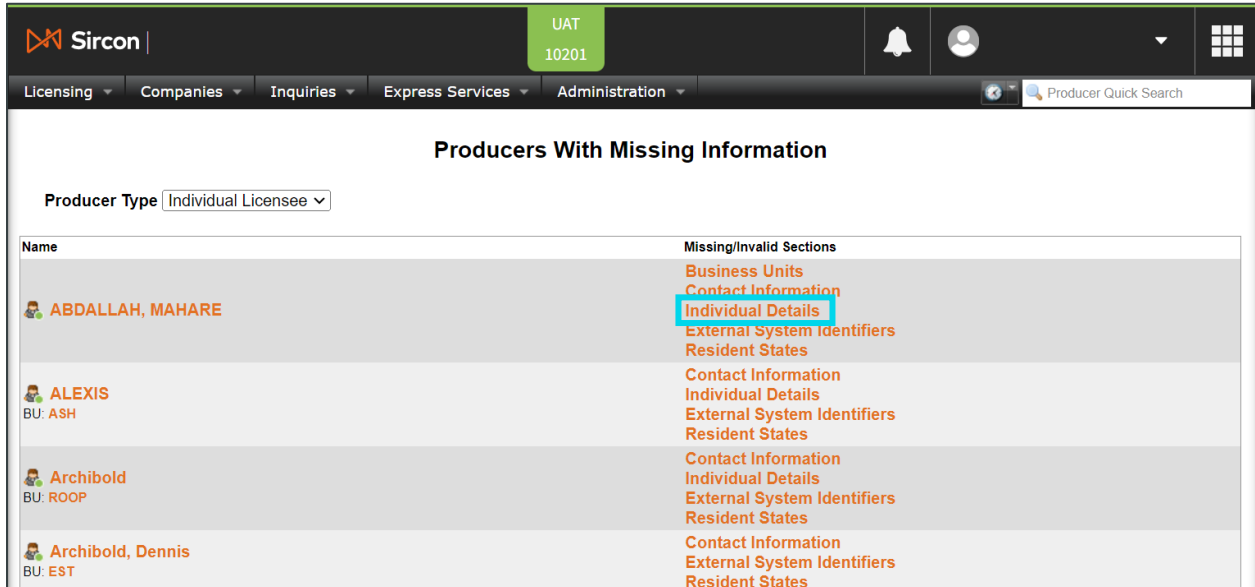
Buttons: Verify Sales Authorization, Review Sircon Subscription

Section: Producers with Missing Information

Maintain Individual Details

In this section, we will learn how to maintain the **Birth Date** in the individual details section of the producer record if your organization requires the birth date to be maintained.

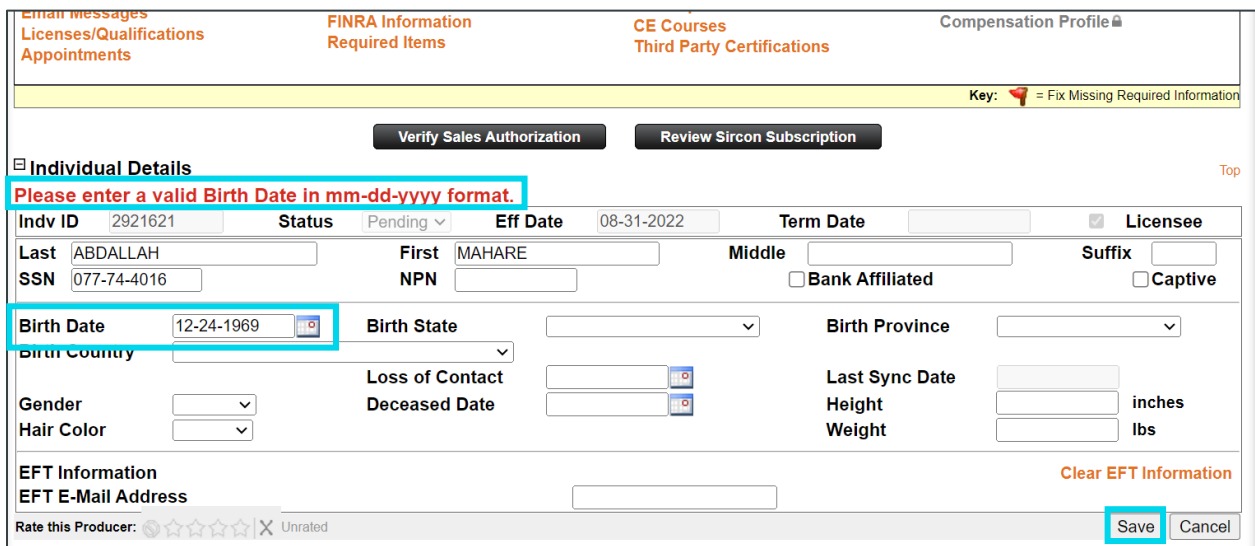
1. From the *Producers With Missing Information* page, click the **Individual Details** link.




The screenshot shows the 'Producers With Missing Information' page in the Siron system. The page has a navigation bar with 'Licensing', 'Companies', 'Inquiries', 'Express Services', and 'Administration'. The 'UAT' user is logged in with ID 10201. The 'Producer Type' is set to 'Individual Licensee'. The main content area displays a table of producers with missing information. The producer 'ABDALLAH, MAHARE' is highlighted, and the 'Individual Details' link is highlighted in blue.

Name	Missing/Invalid Sections
ABDALLAH, MAHARE	Business Units Contact Information Individual Details External System Identifiers Resident States
ALEXIS BU: ASH	Contact Information Individual Details External System Identifiers Resident States
Archibold BU: ROOP	Contact Information Individual Details External System Identifiers Resident States
Archibold, Dennis BU: EST	Contact Information External System Identifiers Resident States

2. You will now see the *Review/Update Individual* page. Under the **Individual Details** section, you will see a message that says, "Please enter a valid Birth Date in MM-DD-YYYY format."
3. Type the producer's **Birth Date** then click **Save**.




The screenshot shows the 'Review/Update Individual' page in the Siron system. The 'Individual Details' section is highlighted. A message above the form says "Please enter a valid Birth Date in mm-dd-yyyy format." The 'Birth Date' field is highlighted with a red box and contains the value '12-24-1969'. The 'Save' button is highlighted in blue.

Key:  = Fix Missing Required Information

Verify Sales Authorization Review Siron Subscription

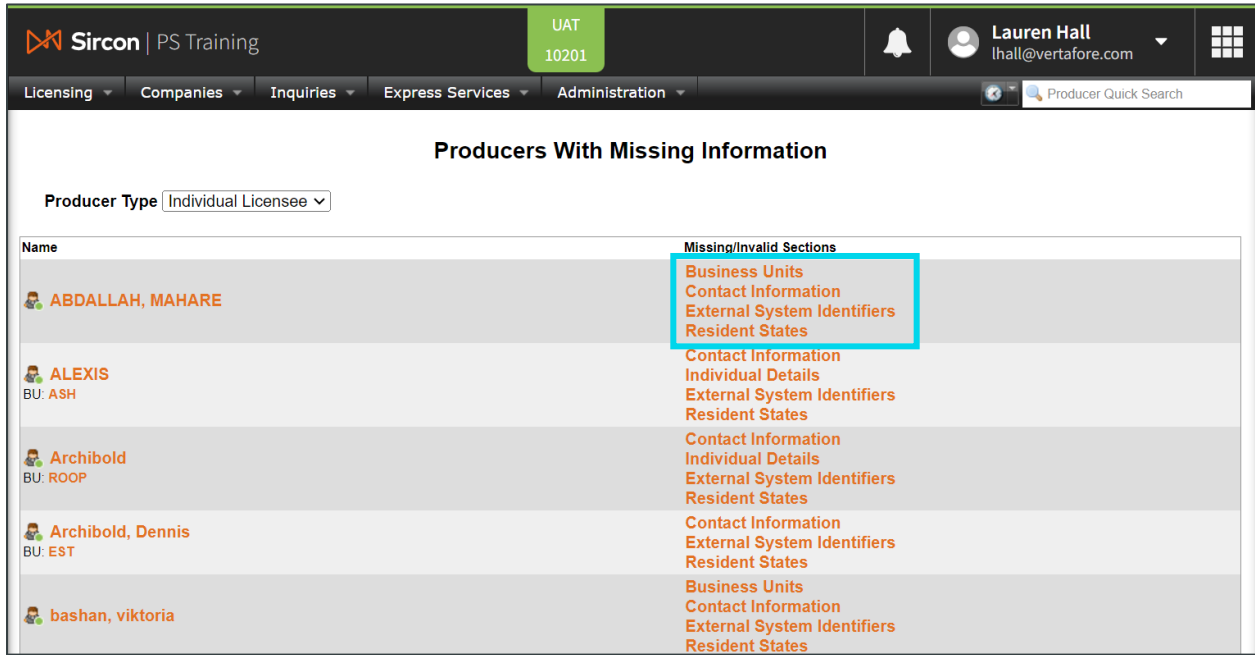
Individual Details Top

Please enter a valid Birth Date in mm-dd-yyyy format.






Indv ID	2921621	Status	Pending	Eff Date	08-31-2022	Term Date		<input checked="" type="checkbox"/> Licensee
Last	ABDALLAH	First	MAHARE	Middle		Suffix		
SSN	077-74-4016	NPN		<input type="checkbox"/> Bank Affiliated		<input type="checkbox"/> Captive		
Birth Date	12-24-1969	Birth State		Birth Province				
Birth Country		Loss of Contact		Last Sync Date		Height		inches
Gender		Deceased Date		Weight				lbs
EFT Information								Clear EFT Information
EFT E-Mail Address								
Rate this Producer:  Unrated								Save Cancel

Section: Producers with Missing Information

- When you return to the *Producers With Missing Information* page, the **Individual Details** link will disappear from the **Missing/Invalid Sections**. This indicates the update was successful.



The screenshot shows the 'Producers With Missing Information' page in the Vertafore system. The page header includes the Sircon logo, 'PS Training', and user information for Lauren Hall. The main content area displays a table of producers with missing information. The 'Missing/Invalid Sections' for 'ABDALLAH, MAHARE' are highlighted with a red box.

Name	Missing/Invalid Sections
 ABDALLAH, MAHARE	Business Units Contact Information External System Identifiers Resident States
 ALEXIS BU: ASH	Contact Information Individual Details External System Identifiers Resident States
 Archibold BU: ROOP	Contact Information Individual Details External System Identifiers Resident States
 Archibold, Dennis BU: EST	Contact Information External System Identifiers Resident States
 bashan, viktor	Business Units Contact Information External System Identifiers Resident States






Section: Producers with Missing Information

Maintain Contact Information

Use the *Maintain Contact Information* page to add, update, or delete addresses, phone numbers, web addresses, email addresses, and communication preferences for a selected individual or firm producer.



Use this section to update specific **Individual and/or Firm Address Types** or **Specific Individual and/or Firm Phone Types** that are required by your organization.

1. Click the **Contact Information** link from the *Producers With Missing Information* page.

Producers With Missing Information	
Producer Type <input type="text" value="Individual Licensee"/>	
Name	Missing/Invalid Sections
 ABDALLAH, MAHARE	Business Units Contact Information External System Identifiers Resident States
 ALEXIS BU: ASH	Contact Information Individual Details External System Identifiers Resident States
 Archibold BU: ROOP	Contact Information Individual Details External System Identifiers Resident States
 Archibold, Dennis BU: EST	Contact Information External System Identifiers Resident States
 bashan, viktor	Business Units Contact Information External System Identifiers Resident States

2. You will now see the *Maintain Contact Information* page.
3. A message at the top of the section will detail the contact information that is required by your company.

Note: In this example, the **Mailing Address** and **Residential Address** are both required information.

Maintain Contact Information				
 ABDALLAH, MAHARE <small>Unrated</small>				Search Producer
External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
 This producer has invalid information or is missing required information.				
<ul style="list-style-type: none"> • Mailing Address must be entered. • Residential Address must be entered. 				
Addresses				Add New Address
Delete		Actions		
Nothing found to display.				


Section: Producers with Missing Information


4. In the **Address Information** section, fill in the following fields:
 - **Address Type:** Select the address type such as Residential, Mailing, or Business Location.
 - **Line One:** Enter the first line of the address.
 - **City:** Enter the city of the address.
 - **State:** Select the State from the dropdown.
 - **Postal Code:** Type the postal code.

Note: The **Country** will default to the United States. You only need to change the **Country** or **Province** if the address is outside of the United States.

5. Click **Save**.

Maintain Contact Information

 **ABDALLAH, MAHARE** Unrated
[Search Producer](#)

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
 This producer has invalid information or is missing required information.				

- **Mailing Address must be entered.**
- **Residential Address must be entered.**

Addresses [Add New Address](#)

Delete	Actions
Nothing found to display.	

Address Information [Clear](#)

Lock from NCOA Updates Mark as Invalid

Address Type <input type="text" value="Mailing"/>	Business Unit <input type="text"/>
Copy From <input type="text"/>	Line Two <input type="text"/>
Line One <input type="text" value="777 Lucky Avenue"/>	State <input type="text" value="Arizona"/>
City <input type="text" value="Mesa"/>	Postal Code <input type="text" value="85200"/>
Province <input type="text"/>	Country <input type="text"/>

Phone Information [Add New Phone](#)

Delete	Phone Type	Number	Ext	Actions
Nothing found to display.				

Add/Update Phone Information [Clear](#)

Phone Type <input type="text"/>	Number <input type="text"/>	Ext <input type="text"/>
---------------------------------	-----------------------------	--------------------------

Internet

Email Address <input type="text" value="jkoll@vertafore.com"/>
--


Communication Preferences


<input type="radio"/> Electronic Mail	Address Type <input type="text" value="Mailing"/>
<input type="radio"/> Fax	Phone Type <input type="text"/>
<input checked="" type="radio"/> Postal Mail	
<input type="radio"/> Telephone	

Section: Producers with Missing Information

- You will see the message at the top of the screen update, and now the **Residential Address** needs updated.
- Enter the **Address Information**, then click **Save**.


Maintain Contact Information


 **ABDALLAH, MAHARE** Unrated
[Search Producer](#)

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
 This producer has invalid information or is missing required information.				

• Residential Address must be entered.

Addresses [Add New Address](#)

Delete	Address Type	Mailing	Business Unit	Actions
<input type="checkbox"/>	Line One	777 Lucky Avenue	Line Two	
	City	Mesa	State	Arizona
	Province		Postal Code	85200
			Country	

Key:  = Edit

Address Information [Clear](#)

Lock from NCOA Updates Mark as Invalid

Address Type: Business Unit:

Copy From:

Line One: Line Two:

City: State: Postal Code:

Province: Country:

Phone Information [Add New Phone](#)

Delete	Phone Type	Number	Ext	Actions
Nothing found to display.				

Add/Update Phone Information [Clear](#)

Phone Type: Number: Ext:

Internet

Email Address:

Communication Preferences

Electronic Mail
 Fax
 Postal Mail
 Telephone

Address Type:
 Phone Type:

Section: Producers with Missing Information

8. The **Address** section will update with your saved addresses.

Maintain Contact Information

ABDALLAH, MAHARE Unrated
[Search Producer](#)

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
This producer has invalid information or is missing required information.				

Addresses [Add New Address](#)

Delete	Address	Business Unit	Actions
<input type="checkbox"/>	Address Type Mailing Line One 777 Lucky Avenue City Mesa Province	Line Two State Arizona Postal Code 85200 Country	
<input type="checkbox"/>	Address Type Residential Line One 777 Lucky Avenue City Mesa Province	Line Two State Arizona Postal Code 85200 Country	

Key: = Edit

9. In the *Producers with Missing Information* page, the **Contact Information** link has been removed from the **Missing/Invalid Sections**.

Sircon | PS Training
UAT
10201

 Lauren Hall
lhall@vertafore.com

Licensing
Companies
Inquiries
Express Services
Administration
Producer Quick Search

Producers With Missing Information

Producer Type Individual Licensee

Name	Missing/Invalid Sections
ABDALLAH, MAHARE	Business Units External System Identifiers Resident States
ALEXIS BU: ASH	Contact Information Individual Details External System Identifiers Resident States
Archibold BU: ROOP	Contact Information Individual Details External System Identifiers Resident States
Archibold, Dennis BU: EST	Contact Information External System Identifiers Resident States
bashan, viktor	Business Units Contact Information External System Identifiers Resident States

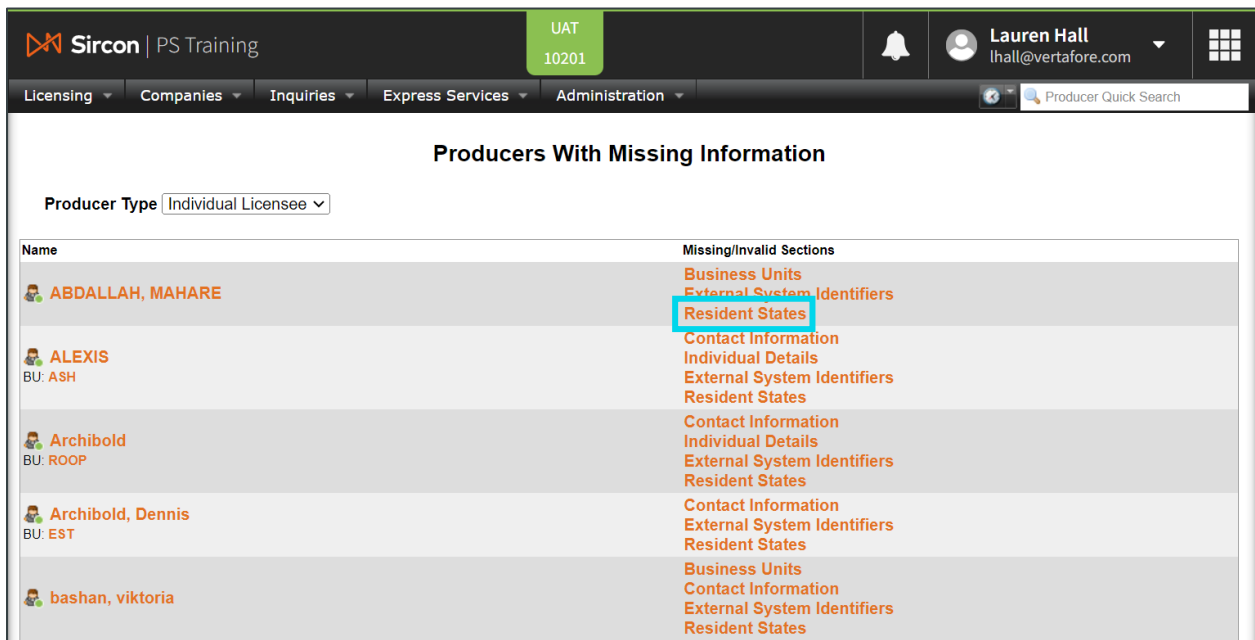
Maintain Resident States

A resident insurance license allows a producer to solicit, quote, negotiate or write insurance in a state in the producer's state of residency. A producer must carry an active resident license in his home state prior to obtaining a non-resident license in any other state.

Note: Typically, the Resident State will pull in from the Producer Database with a data sync if that producer has a Resident State (License). A missing Resident State could pose a problem with future transactions and adding one manually will not circumvent this issue at the state/NIPR level, it is just making the missing flag go away in the producer record.






Use the *Maintain Resident States* page to add, update, or delete information concerning a producer's state(s) of residency.

1. Click the **Resident States** link from the *Producers With Missing Information* page.



The screenshot shows the Siron PS Training interface. The top navigation bar includes 'Siron | PS Training', 'UAT 10201', a notification bell, and a user profile for 'Lauren Hall' (lhall@vertafore.com). Below the navigation bar are tabs for 'Licensing', 'Companies', 'Inquiries', 'Express Services', and 'Administration'. A search bar labeled 'Producer Quick Search' is on the right.

The main content area is titled 'Producers With Missing Information'. It features a dropdown menu for 'Producer Type' set to 'Individual Licensee'. Below this is a table with two columns: 'Name' and 'Missing/Invalid Sections'.

Name	Missing/Invalid Sections
 ABDALLAH, MAHARE	Business Units External System Identifiers Resident States
 ALEXIS BU: ASH	Contact Information Individual Details External System Identifiers Resident States
 Archibold BU: ROOP	Contact Information Individual Details External System Identifiers Resident States
 Archibold, Dennis BU: EST	Contact Information External System Identifiers Resident States
 bashan, viktor	Business Units Contact Information External System Identifiers Resident States

2. You will now see the *Maintain Resident States* page. You will see a message that says, "At least one Resident state must be entered."
3. You can add a **Resident State** by filling out the following fields:
 - **State:** Select the name of the Resident State.
 - **Cert. Effective Date:** Enter the date on which the selected producer earned securities or professional designation certification in that state.
 - **Cert. Expiration Date:** Enter the date on which the selected producer's securities or professional designation certification in that state expired or will expire.

Section: Producers with Missing Information

- **License Expiration Date:** Enter the date on which the selected producer's resident insurance license in that state expired or will expire.

Note: The **Cert. Effective Date**, the **Cert. Expiration Date**, and the **License Expiration Date** fields are optional.

4. Click **Save** to save and stay on the same page to continue making changes. Click **Return** to return to the producer record without saving. Click **Save & Return** to save the information and return to the producer record.

Note: If the producer needs to update their resident state, they will also need to follow the state-to-state move processes and submit changes to the PDB.

Maintain Resident States

Search Producer

ABDALLAH, MAHARE Unrated

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
This producer has invalid information or is missing required information.				

- At least one Resident state must be entered.

Current Resident States				Add Resident State
Delete	State	Cert Effective Date	Cert Expiration Date	License Expiration Date

Add/Update Resident State				Clear
State	Cert Effective Date	Cert Expiration Date	License Expiration Date	
Arizona	02-02-2009			

5. The **Resident State** is now added to the producer.

Maintain Resident States

Search Producer

ABDALLAH, MAHARE Unrated

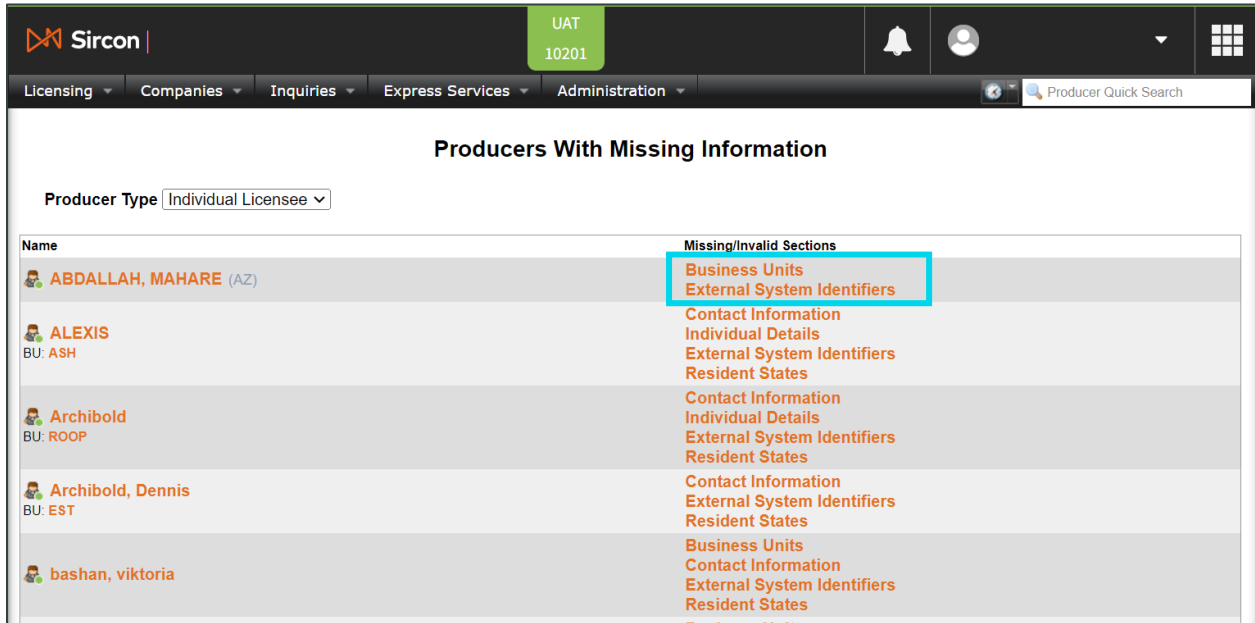
External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
			AZ	






Current Resident States				Add Resident State
Delete	State	Cert Effective Date	Cert Expiration Date	License Expiration Date
<input type="checkbox"/>	Arizona	02-02-2009		

Add/Update Resident State				Clear
State	Cert Effective Date	Cert Expiration Date	License Expiration Date	
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	

Section: Producers with Missing Information

- In the *Producers with Missing Information* page, the **Resident States** link is now removed from the **Missing/Invalid Sections** column.



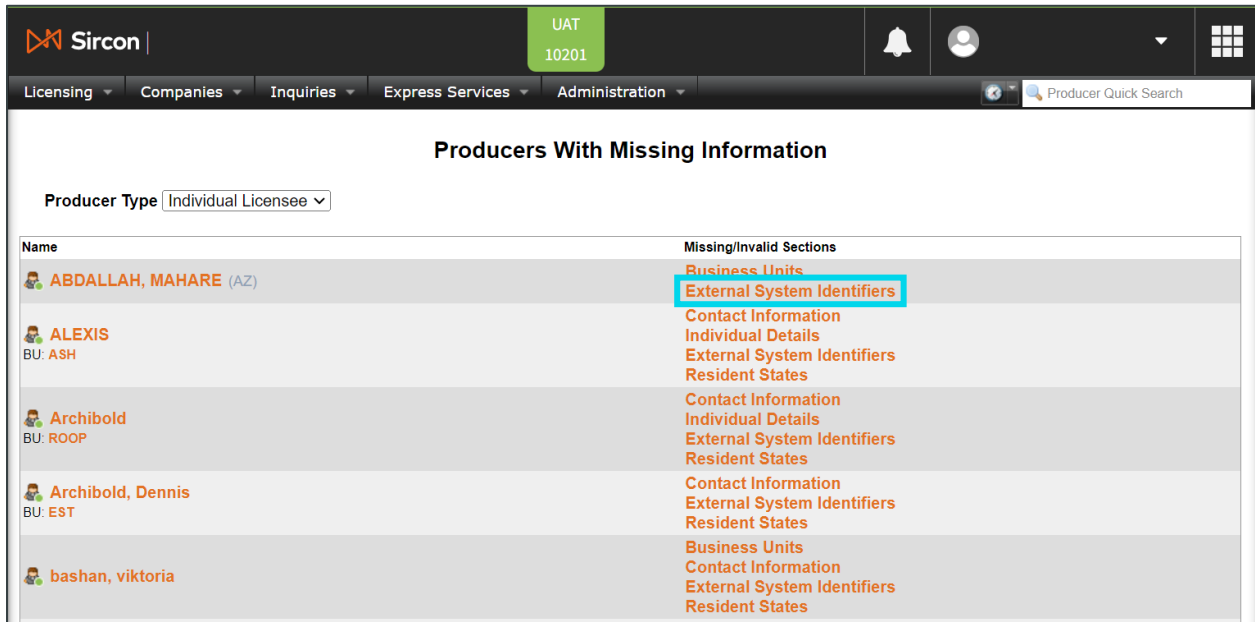
Name	Missing/Invalid Sections
 ABDALLAH, MAHARE (AZ)	Business Units External System Identifiers
 ALEXIS BU: ASH	Contact Information Individual Details External System Identifiers Resident States
 Archibold BU: ROOP	Contact Information Individual Details External System Identifiers Resident States
 Archibold, Dennis BU: EST	Contact Information External System Identifiers Resident States
 bashan, viktorja	Business Units Contact Information External System Identifiers Resident States






Section: Producers with Missing Information

Maintain External System Identifiers

Use the *Maintain External System Identifiers* page to add a selected producer's external system identifier information.

1. Click the **External System Identifiers** link from the *Producers with Missing Information* page.



Name	Missing/Invalid Sections
 ABDALLAH, MAHARE (AZ)	Business Units External System Identifiers Contact Information
 ALEXIS BU: ASH	Individual Details External System Identifiers Resident States
 Archibold BU: ROOP	Contact Information Individual Details External System Identifiers Resident States
 Archibold, Dennis BU: EST	Contact Information External System Identifiers Resident States
 bashan, viktor	Business Units Contact Information External System Identifiers Resident States

2. You will now see the *Maintain External System Identifiers* page. At the top of the page, you will see a message that says, "Each producer requires at least one External System Identifier row."
3. In the *Add/Update External System Identifiers* section, update the following fields:
 - **External System Type:** Select the external system name or producer grouping type.
 - **External System ID:** Enter the **External System ID**. You can either type the External System ID or click the **Generate ID** button.
 - **Business Unit:** You can optionally add the Business Unit that corresponds to the External System ID.
 - **Primary** or **Inactive** Checkboxes: Click the **Primary** check box to make the External System ID the main ID. Click the **Inactive** check box to make the External System ID inactive.
4. Click **Save** to save and stay on the same page to continue making changes. Click **Return** to return to the producer record without saving. Click **Save & Return** to save the information and return to the producer record.

Section: Producers with Missing Information

Maintain External System Identifiers

[Search Producer](#)

ABDALLAH, MAHARE Unrated

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
			AZ	

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

• Each Producer requires at least one External System Identifier row.

Current External System Identifiers [Add New External System Identifier](#)

Delete	External System Type	External System ID	Business Unit	Primary	Inactive
<input type="button" value="Delete"/>				<input type="checkbox"/>	<input type="checkbox"/>

Add/Update External System Identifiers [Clear](#)

External System Type	External System ID	Business Unit	Primary	Inactive
<input type="text" value="Agent Id"/>	<input type="text" value="1111"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

5. The External System Identifier is now saved to the producer record.

Maintain External System Identifiers

[Search Producer](#)

ABDALLAH, MAHARE Unrated

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
1111			AZ	

⚠ 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"/>	Agent Id	1111		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Add/Update External System Identifiers [Clear](#)

External System Type	External System ID	Business Unit	Primary	Inactive
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. In the *Producers with Missing Information* page, the **Business Units** link is now removed from the **Missing/Invalid Sections** column.

Producers With Missing Information

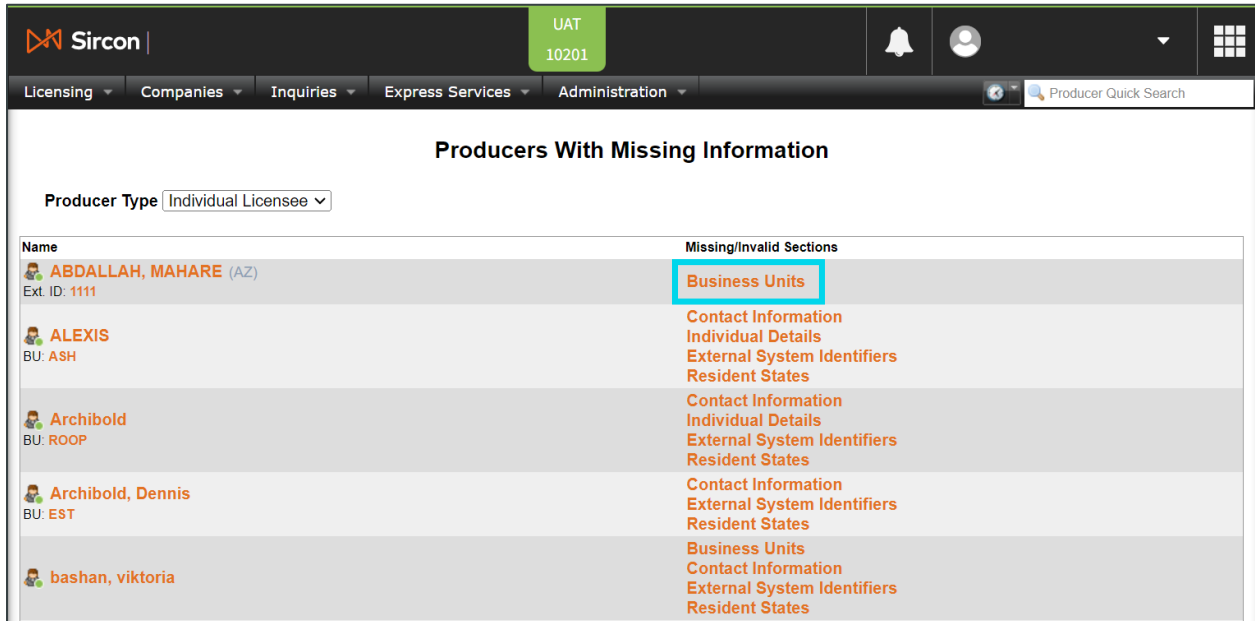
Producer Type:

Name	Missing/Invalid Sections
ABDALLAH, MAHARE (AZ) Ext. ID: 1111	Business Units
ALEXIS BU: ASH	Contact Information Individual Details External System Identifiers Resident States
Archibold BU: ROOP	Contact Information Individual Details External System Identifiers Resident States
Archibold, Dennis BU: EST	Contact Information External System Identifiers Resident States

Maintain Business Units






If you have administrative permissions, use the *Maintain Producer Business Unit* page to add a business unit to the producer. Use this page to manage a producer's assignment to one or multiple business divisions, segments, distribution channels, or geographic locations in your organization.

1. Click the **Business Units** link from the *Producers with Missing Information* page.

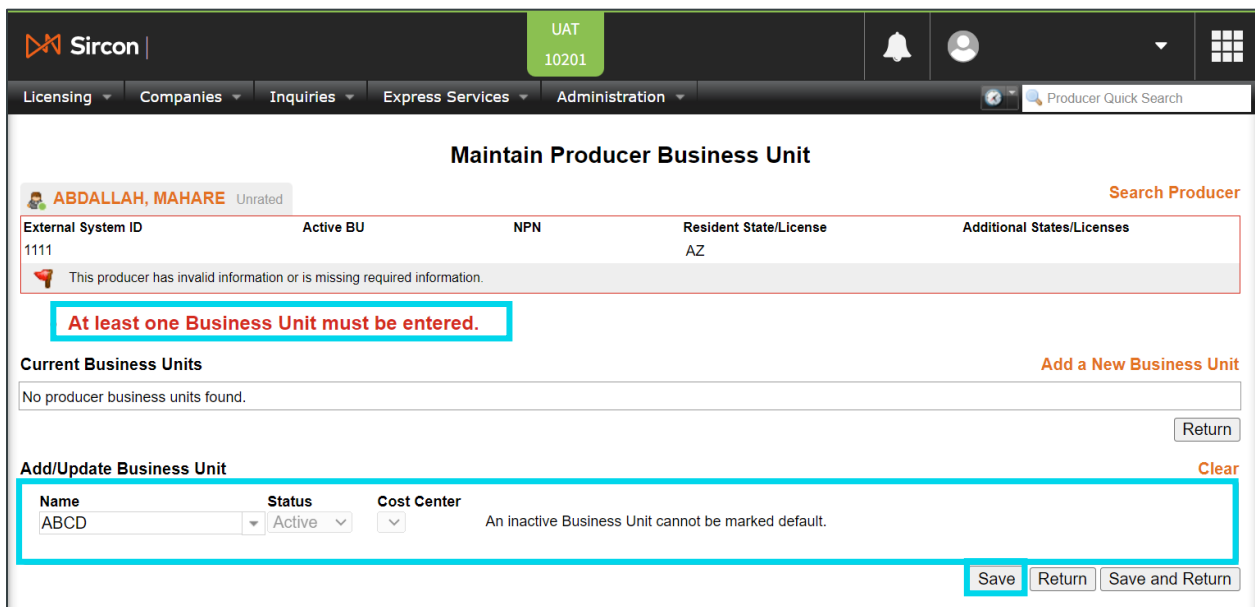


Producers With Missing Information


Producer Type: Individual Licensee

Name	Missing/Invalid Sections
 ABDALLAH, MAHARE (AZ) Ext. ID: 1111	Business Units
 ALEXIS BU: ASH	Contact Information Individual Details External System Identifiers Resident States
 Archibold BU: ROOP	Contact Information Individual Details External System Identifiers Resident States
 Archibold, Dennis BU: EST	Contact Information External System Identifiers Resident States
 bashan, viktor	Business Units Contact Information External System Identifiers Resident States


2. Choose the **Name** of the Business Unit you want to add from the drop-down list.
3. Click **Save** or **Save and Return**.



Maintain Producer Business Unit

 **ABDALLAH, MAHARE** Unrated Search Producer

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
1111			AZ	

 This producer has invalid information or is missing required information.

At least one Business Unit must be entered.

Current Business Units Add a New Business Unit

No producer business units found. Return

Add/Update Business Unit Clear

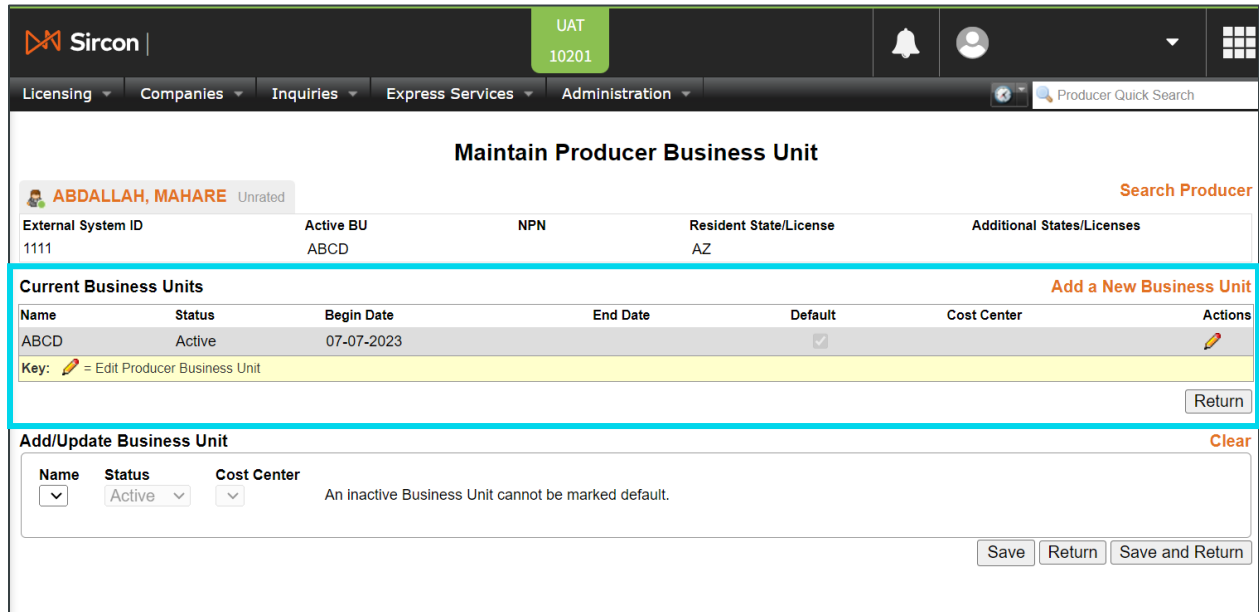
Name	Status	Cost Center
ABCD	Active	

An inactive Business Unit cannot be marked default.

Save Return Save and Return

Section: Producers with Missing Information

4. The **Business Unit** is now added to the producer.



Maintain Producer Business Unit

ABDALLAH, MAHARE Unrated Search Producer

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
1111	ABCD		AZ	

Current Business Units Add a New Business Unit

Name	Status	Begin Date	End Date	Default	Cost Center	Actions
ABCD	Active	07-07-2023		<input checked="" type="checkbox"/>		

Key: = Edit Producer Business Unit Return

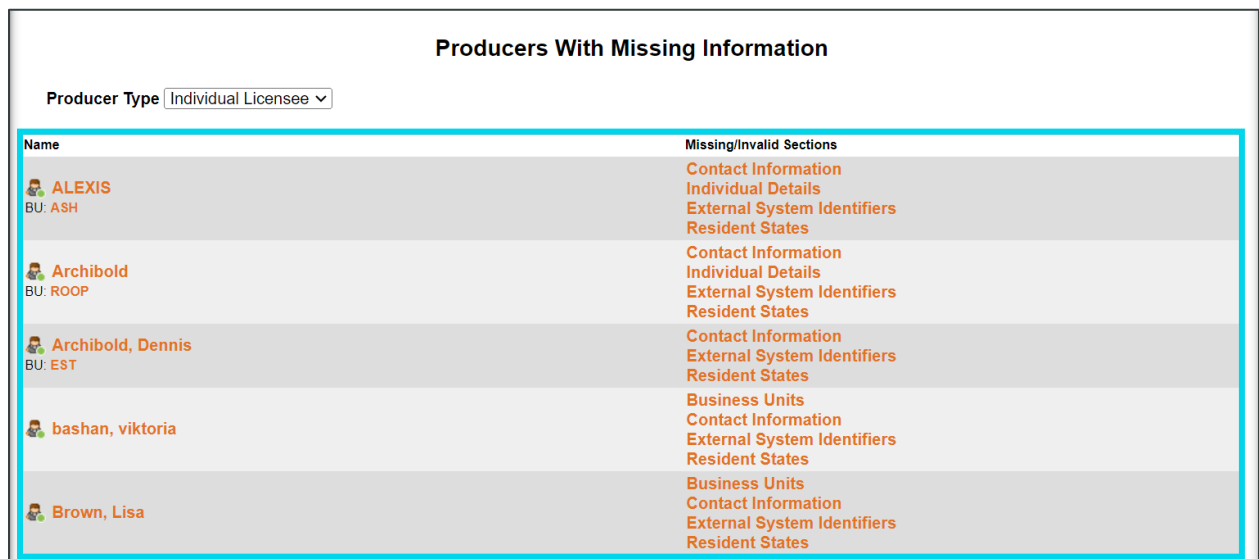
Add/Update Business Unit Clear

Name	Status	Cost Center
<input type="text"/>	Active <input type="text"/>	<input type="text"/>

An inactive Business Unit cannot be marked default.

Save Return Save and Return

5. In the *Producers with Missing Information* page, the **Business Units** link is now removed from the **Missing/Invalid Sections** column. Since all the missing data was added, the producer no longer appears on the page.



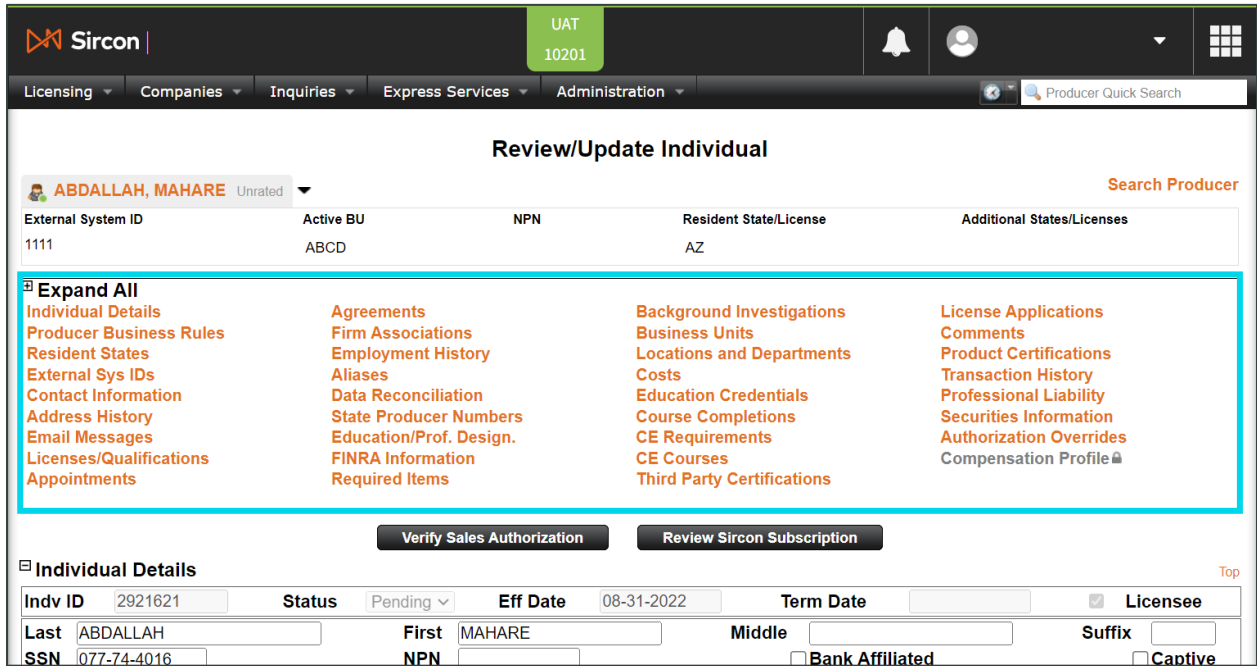
Producers With Missing Information

Producer Type

Name	Missing/Invalid Sections
ALEXIS BU: ASH	Contact Information Individual Details External System Identifiers Resident States
Archibold BU: ROOP	Contact Information Individual Details External System Identifiers Resident States
Archibold, Dennis BU: EST	Contact Information External System Identifiers Resident States
bashan, viktoria	Business Units Contact Information External System Identifiers Resident States
Brown, Lisa	Business Units Contact Information External System Identifiers Resident States

Section: Producers with Missing Information

Note: When you open the producer's record, there are no longer **Missing Required Information** (🚩) flags in the quick links.



Review/Update Individual

ABDALLAH, MAHARE Unrated Search Producer

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
1111	ABCD		AZ	

Expand All

Individual Details	Agreements	Background Investigations	License Applications
Producer Business Rules	Firm Associations	Business Units	Comments
Resident States	Employment History	Locations and Departments	Product Certifications
External Sys IDs	Aliases	Costs	Transaction History
Contact Information	Data Reconciliation	Education Credentials	Professional Liability
Address History	State Producer Numbers	Course Completions	Securities Information
Email Messages	Education/Prof. Design.	CE Requirements	Authorization Overrides
Licenses/Qualifications	FINRA Information	CE Courses	Compensation Profile <small>🔒</small>
Appointments	Required Items	Third Party Certifications	

Individual Details Top

Indv ID	Status	Eff Date	Term Date	Licensee
2921621	Pending	08-31-2022		<input checked="" type="checkbox"/>

Last	ABDALLAH	First	MAHARE	Middle		Suffix	
SSN	077-74-4016	NPN		<input type="checkbox"/> Bank Affiliated		<input type="checkbox"/> Captive	

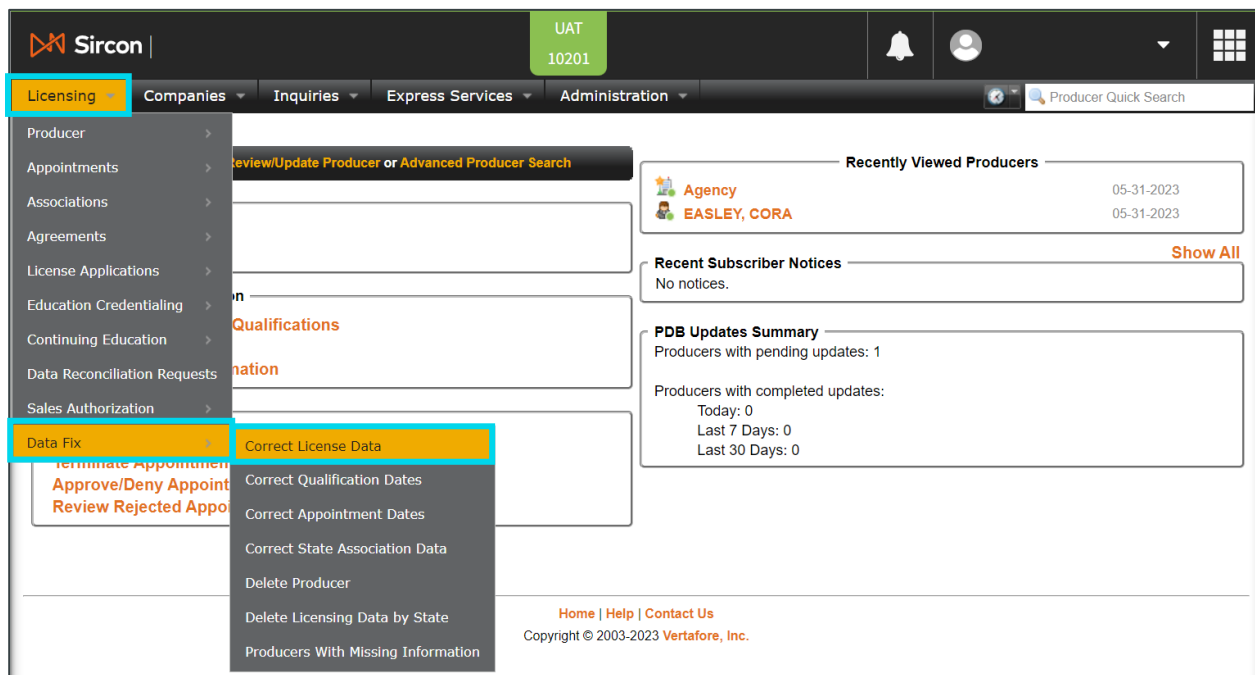
Correct License Data

Use the *Correct License Data* page to correct a selected producer's license data in one or multiple states. You also can protect license data from being updated by an automated data reconciliation. Use this option to change the license number, effective dates, and expiration dates within the Sircon producer record.

When you correct license data manually, you are only updating the Sircon producer record. Updates will **not** be sent to the states.

Note: This option is only available if the corresponding permission has been granted to the security role to which your user account is assigned.

1. From the **Licensing** menu, select **Data Fix** and then select **Correct License Data**.

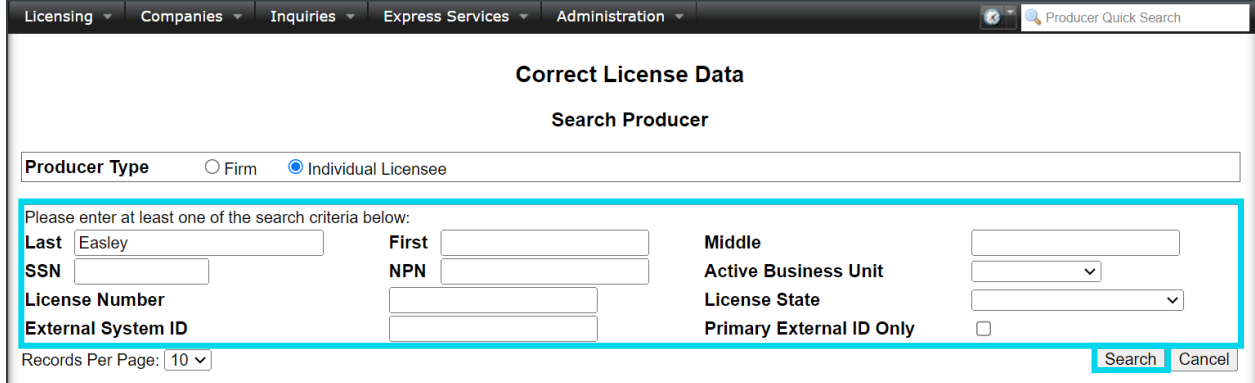


2. You will now see the *Correct License Data Search Producer* page. Use at least one of the search criteria to locate a producer.

Note: In this example, we are using the **Last** name to locate the producer.

3. Click **Search**.

Section: Correct License Data




4. Select the license you need to edit by clicking the radio button next to the license.
5. At the bottom of the screen, you can edit the following details for the license you selected:
 - a. **Original Issue Date:** Enter the date on which the license was initially issued or granted by the state.
 - b. **Effective Date:** Enter the date on which the current value of the Status field became effective.
 - c. **Expiration Date:** Enter the state-regulated date on which the license expires. Also known as the "renewal date."
 - d. **License Number:** Enter the state license number or identifier.
 - e. **License Suspend Begin/End Date:** Enter the date on which the issuing regulatory jurisdiction suspended or reinstated the license.
 - f. **Copy Received:** Click the checkmark if your company holds a physical copy of the license, license certificate, or letter of certification; a blank checkbox if your company does not hold a physical copy of the license, license certificate, or letter of certification.
 - g. **Locked from Data Reconciliation Updates:** Click the checkmark to protect selected license data on the selected producer record from being overwritten by automated PDB syncs. The action also will protect a license's related qualifications (license lines).

Note: When you lock the producer from data reconciliations, the producer will no longer receive any license updates from the PDB. This can cause future issues with licenses and appointments.

6. Make necessary updates then click **Next** to save the changes.


Section: Correct License Data

Correct License Data

 **EASLEY, CORA** Unrated

[Search Producer](#)

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
	ABCD	1000000028	VA / 736178	<input type="checkbox"/> AZ / 1000000005

 This producer has invalid information or is missing required information.

Select the License to correct:

Licenses

State	License Type	License Number	Original Issue Date	Status	Effective Date	Expiration Date	Inactivation Reason	License Suspend Begin Date	License Suspend End Date	Copy Rec'd
<input checked="" type="radio"/>	AZ	Insurance Producer	1000000005	05-06-2023	Active	05-06-2023	05-06-2023			<input type="checkbox"/>
<input type="radio"/>	CA	Non-Res Insurance Producer	0C52119	01-26-1999	Active	05-27-2015	10-05-2023			<input type="checkbox"/>
<input type="radio"/>	CO	Non-Resident Producer	398256	04-24-2012	Inactive	03-31-2014	03-31-2014	Canceled		<input type="checkbox"/>
<input type="radio"/>	DE	Insurance Producer	3000565515	05-30-2023	Active	05-30-2023	10-05-2023			<input type="checkbox"/>
<input type="radio"/>	DC	Insurance Producer	155160	03-23-2012	Active	03-30-2020	10-05-2023			<input type="checkbox"/>
<input type="radio"/>	FL	Non-Resident Agent	W448056	10-24-2017	Active	10-24-2017	12-31-2024			<input type="checkbox"/>
<input type="radio"/>	ID	Non-Resident Producer	330290	10-27-2009	Active	04-11-2014	10-05-2023			<input type="checkbox"/>
<input type="radio"/>	ME	Non-Resident Producer	PRN291771	08-12-2017	Active	08-12-2017	12-31-2024			<input type="checkbox"/>
<input type="radio"/>	MD	Insurance Producer	5438	07-01-1985	Active	01-21-2020	10-05-2023			<input type="checkbox"/>
<input type="radio"/>	MA	Individual Producer	1996312	01-14-2016	Active	01-14-2016	10-05-2023			<input type="checkbox"/>
<input type="radio"/>	MI	Non-Resident Producer	1000000005	04-13-2016	Active	04-13-2016	12-31-2024			<input type="checkbox"/>
<input type="radio"/>	NJ	Insurance Producer	90577	08-18-2015	Active	08-18-2015	10-05-2023			<input type="checkbox"/>
<input type="radio"/>	NM	Insurance Producer	1000000005	05-08-2009	Active	05-08-2009	10-05-2023			<input type="checkbox"/>
<input type="radio"/>	NC	Insurance Producer	1000000005	08-18-2015	Active	02-04-2016	03-31-2024			<input type="checkbox"/>
<input type="radio"/>	OH	Major Lines	836226	02-14-2011	Inactive	03-31-2013	03-31-2013	Canceled		<input type="checkbox"/>
<input type="radio"/>	PA	Non-Res Producer Individual	573305	04-06-2010	Active	04-06-2010	10-05-2023			<input type="checkbox"/>
<input type="radio"/>	TN	Insurance Producer	2325195	01-18-2016	Inactive	03-31-2018	03-31-2018	Canceled		<input type="checkbox"/>
<input type="radio"/>	VA	Insurance Producer	736178	07-24-1975	Active	07-24-1975	12-31-2024			<input type="checkbox"/>
<input type="radio"/>	WA	Insurance Producer	983150	06-01-2018	Active	06-01-2018	10-05-2023			<input type="checkbox"/>

Original Issue Date	02-06-2023	<input type="button" value="📅"/>
Effective Date	05-06-2023	<input type="button" value="📅"/>
Expiration Date	05-06-2023	<input type="button" value="📅"/>
License Number	1000000005	
License Suspend Begin Date		<input type="button" value="📅"/>
License Suspend End Date		<input type="button" value="📅"/>
Copy Received	<input type="checkbox"/>	
Locked from Data Reconciliation Updates	<input type="checkbox"/>	

7. You will now see the *Correct Qualification Dates* page. You will see the list of the qualifications associated with the license you selected on the previous page. If you need to correct the qualification data, select the qualification then scroll down to the bottom of the screen.
8. Here you can edit the details of the selected qualification, including the:
 - a. **Original Issue Date**
 - b. **Effective Date**
 - c. **Expiration Date**
 - d. **Locked from Data Reconciliation Updates** check box.
9. Click **Save and Return** to confirm the qualification updates. You will return to the **Correct License Data** page.

Section: Correct License Data

Correct Qualification Dates

EASLEY, CORA Unrated Search Producer

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
	ABCD	1000000028	VA / 736178	AZ / 1000000005

This producer has invalid information or is missing required information.

Select the Qualification(s) to correct:

State	Qualification Type	Original Issue Date	Status	Effective Date	Expiration Date	Inactivation Reason
<input type="checkbox"/> AZ	Accident & Health or Sickness	05-06-2023	Active	05-06-2023	05-06-2023	
<input checked="" type="checkbox"/> AZ	Life	05-06-2023	Active	05-06-2023	05-06-2023	
<input type="checkbox"/> AZ	Variable Life/Variable Annuity	05-06-2023	Active	05-06-2023	05-06-2023	

Original Issue Date Clear selected Original Issue Date(s)

Effective Date

Expiration Date Clear selected Expiration Date(s)

Locked from Data Reconciliation Updates

10. You will return to the *Correct License Data* page. Click the **Producer Name** link to open the producer record.

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10201
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☰

Licensing Companies Inquiries Express Services Administration
🔍 Producer Quick Search

Correct License Data

EASLEY, CORA Unrated Search Producer

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
3050	ABCD	1000000028	VA / 736178	AZ / 1000000005

Select the License to correct:

State	License Type	License Number	Original Issue Date	Status	Effective Date	Expiration Date	Inactivation Reason	License Suspend Begin Date	License Suspend End Date	Copy Rec'd
<input checked="" type="radio"/> AZ	🔒 Insurance Producer	1000000005	02-06-2023	Active	05-06-2023	05-06-2023				<input type="checkbox"/>
<input type="radio"/> CA	Non-Res Insurance Producer	0C52119	01-26-1999	Active	05-27-2015	10-05-2023				<input type="checkbox"/>
<input type="radio"/> CO	Non-Resident Producer	398256	04-24-2012	Inactive	03-31-2014	03-31-2014	Canceled			<input type="checkbox"/>

11. You will now see the *Review/Update Individual* page.

12. Click the **Licenses/Qualifications** quick link.

Section: Correct License Data

Sircon | UAT 10201 | Producer Quick Search

Licensing | Companies | Inquiries | Express Services | Administration

Review/Update Individual

EASLEY, CORA Unrated Search Producer

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
ABCD		1000000028	VA / 736178	AZ / 1000000005

This producer has invalid information or is missing required information.

Expand All

- Individual Details
- Producer Business Rules
- Resident States
- External Sys IDs
- Contact Information
- Address History
- Email Messages
- Licenses/Qualifications**
- Appointments

- Agreements
- Firm Associations
- Employment History
- Aliases
- Data Reconciliation
- State Producer Numbers
- Education/Prof. Design.
- FINRA Information
- Required Items

- Background Investigations
- Business Units
- Locations and Departments
- Costs
- Education Credentials
- Course Completions
- CE Requirements
- CE Courses
- Third Party Certifications

- License Applications
- Comments
- Product Certifications
- Transaction History
- Professional Liability
- Securities Information
- Authorization Overrides
- Compensation Profile

Key: = Fix Missing Required Information

Verify Sales Authorization
Review Sircon Subscription

13. The license and qualification data will update within the producer record. If you need to send updates to the states, you will need to submit a license renewal or a license application through the Express Services functionality.

Licenses/Qualifications Top

[Add New License/Qualification](#)

Licenses

License State	License Type	License Number	Original Issue Date	Status	Effective Date	Expiration Date	Inactivation Reason	License Suspend Begin Date	License Suspend End Date	Copy Rec'd
Arizona	Insurance Producer	1000000005	02-06-2023	Active	05-06-2023	05-06-2023				<input type="checkbox"/> Inactivate
California	Non-Res Insurance Producer	0C52119	01-26-1999	Active	05-27-2015	10-05-2023				<input type="checkbox"/> Inactivate
Colorado	Non-Resident Producer	398256	04-24-2012	Inactive	03-31-2014	03-31-2014	Canceled			<input type="checkbox"/> Inactivate
Delaware	Insurance Producer	3000565515	05-30-2023	Active	05-30-2023	10-05-2023				<input type="checkbox"/> Inactivate
District of Columbia	Insurance Producer	155160	03-23-2012	Active	03-30-2020	10-05-2023				<input type="checkbox"/> Inactivate
Florida	Non-Resident Agent	W448056	10-24-2017	Active	10-24-2017	12-31-2024				<input type="checkbox"/> Inactivate
Idaho	Non-Resident Producer	330290	10-27-2009	Active	04-11-2014	10-05-2023				<input type="checkbox"/> Inactivate
Maine	Non-Resident Producer	PRN291771	08-12-2017	Active	08-12-2017	12-31-2024				<input type="checkbox"/> Inactivate

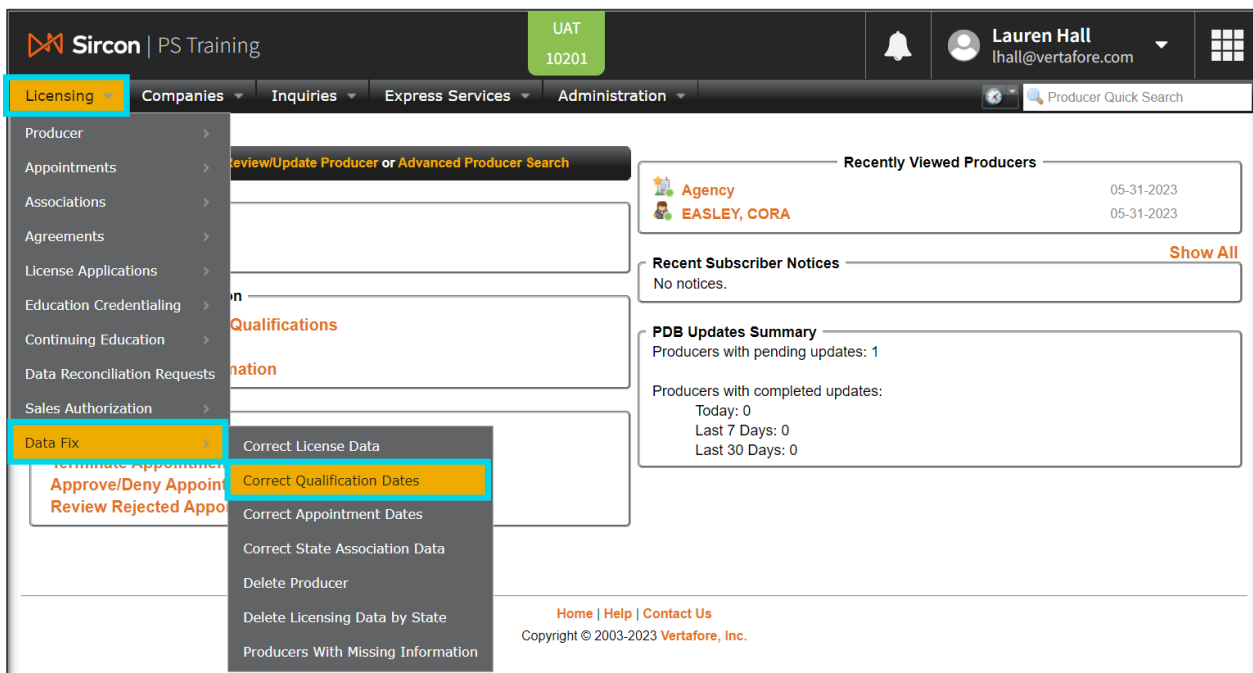
Correct Qualification Dates

Use the *Correct Qualification Dates* page to correct dates associated with license qualifications in one or multiple states. You also can protect qualification data from being updated by an automated data reconciliation. Use this option to change qualification issue dates, effective dates, and expiration dates within the Sircon producer record.

When you correct license data manually, you are only updating the Sircon producer record. Updates will **not** be sent to the states.

Note: This option is only available if the corresponding permission has been granted to the security role to which your user account is assigned.

1. From the **Licensing** menu, select **Data Fix** and then select **Correct Qualification Dates**.



The screenshot shows the Sircon web application interface. The top navigation bar includes the Sircon logo, 'PS Training', a 'UAT 10201' badge, a notification bell, a user profile for 'Lauren Hall' (lhall@vertafore.com), and a 'Producer Quick Search' button. The 'Licensing' menu is open, showing options like 'Producer', 'Appointments', 'Associations', 'Agreements', 'License Applications', 'Education Credentialing', 'Continuing Education', 'Data Reconciliation Requests', 'Sales Authorization', and 'Data Fix'. The 'Data Fix' sub-menu is also open, with 'Correct Qualification Dates' highlighted. Other sub-menu items include 'Correct License Data', 'Correct Appointment Dates', 'Correct State Association Data', 'Delete Producer', 'Delete Licensing Data by State', and 'Producers With Missing Information'. The main content area displays 'Recently Viewed Producers' (Agency: EASLEY, CORA), 'Recent Subscriber Notices' (No notices), and a 'PDB Updates Summary' (Producers with pending updates: 1, Producers with completed updates: Today: 0, Last 7 Days: 0, Last 30 Days: 0). The footer contains 'Home | Help | Contact Us' and 'Copyright © 2003-2023 Vertafore, Inc.'

2. You will now see the *Correct Qualification Dates Search Producer* page. Use at least one of the search criteria to locate a producer.

Note: In this example, we are using the **Last** name to locate the producer.

3. Click **Search**.

Section: Correct Qualification Dates

Correct Qualification Dates

Search Producer

Producer Type Firm Individual Licensee

Please enter at least one of the search criteria below:


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

Records Per Page:


4. You will now see all the active and inactive qualifications for the producer.
5. Select the check box next to the **Qualification** you want to update.
6. You can then update the qualification details, including the: **Original Issue Date**, **Effective Date**, **Expiration Date**, and the **Locked from Data Reconciliation Updates** check box.
7. Click **Save** to submit the changes.

Correct Qualification Dates

Search Producer

 **EASLEY, CORA** Unrated

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
ABCD	ABCD	1000000028	VA / 736178	AZ / 1000000005

 This producer has invalid information or is missing required information.

Select the Qualification(s) to correct:

State	Qualification Type	Original Issue Date	Status	Effective Date	Expiration Date	Inactivation Reason
<input type="checkbox"/> AZ	Accident & Health or Sickness	05-06-2023	Active	05-06-2023	05-06-2023	
<input type="checkbox"/> AZ	Life	05-06-2023	Active	05-06-2023	05-24-2024	
<input type="checkbox"/> AZ	Variable Life/Variable Annuity	05-06-2023	Active	05-06-2023	05-06-2023	
<input checked="" type="checkbox"/> CA	Life Only	01-26-1999	Active	05-27-2015	10-05-2023	
<input type="checkbox"/> CO	Accident and Health	04-24-2012	Inactive	03-31-2014	03-31-2014	
<input type="checkbox"/> CO	Life	04-24-2012	Inactive	03-31-2014	03-31-2014	
<input type="checkbox"/> DE	Health	05-30-2023	Active	05-30-2023	10-05-2023	
<input type="checkbox"/> DE	Life	05-30-2023	Active	05-30-2023	10-05-2023	
<input type="checkbox"/> DE	Variable Annuities	05-30-2023	Active	05-30-2023	10-05-2023	
<input type="checkbox"/> DC	Accident & Health or Sickness	03-23-2012	Active	03-30-2020	10-05-2023	
<input type="checkbox"/> DC	Life	03-23-2012	Active	03-30-2020	10-05-2023	
<input type="checkbox"/> VA	Property and Casualty	07-24-1975	Active	07-24-1975	12-31-2024	
<input type="checkbox"/> VA	Variable Contracts	07-24-1975	Active	07-24-1975	12-31-2024	
<input type="checkbox"/> WA	Disability	06-01-2018	Active	06-01-2018	10-05-2023	
<input type="checkbox"/> WA	Life	06-01-2018	Active	06-01-2018	10-05-2023	
<input type="checkbox"/> WA	Variable Life/Variable Annuity	06-01-2018	Active	06-01-2018	10-05-2023	

Original Issue Date Clear selected Original Issue Date(s)

Effective Date

Expiration Date Clear selected Expiration Date(s)

Locked from Data Reconciliation Updates

Section: Correct Qualification Dates

8. You will return to the *Correct License Data* page. Click the **Producer Name** link to open the producer record.

Correct Qualification Dates

[EASLEY, CORA](#) Unrated
[Search Producer](#)

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
	ABCD	1000000028	VA / 736178	AZ / 1000000005

This producer has invalid information or is missing required information.

Select the Qualification(s) to correct:

State	Qualification Type	Original Issue Date	Status	Effective Date	Expiration Date	Inactivation Reason
<input type="checkbox"/> AZ	Accident & Health or Sickness	05-06-2023	Active	05-06-2023	05-06-2023	
<input type="checkbox"/> AZ	Life	05-06-2023	Active	05-06-2023	05-24-2024	
<input type="checkbox"/> AZ	Variable Life/Variable Annuity	05-06-2023	Active	05-06-2023	05-06-2023	

9. Click the **Licenses/Qualifications** quick link.

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Licensing Companies Inquiries Express Services Administration

Review/Update Individual

[EASLEY, CORA](#) Unrated
[Search Producer](#)

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
	ABCD	1000000028	VA / 736178	AZ / 1000000005

This producer has invalid information or is missing required information.

Expand All

<ul style="list-style-type: none"> Individual Details Producer Business Rules Resident States External Sys IDs Contact Information Address History Email Messages Licenses/Qualifications Appointments 	<ul style="list-style-type: none"> Agreements Firm Associations Employment History Aliases Data Reconciliation State Producer Numbers Education/Prof. Design. FINRA Information Required Items 	<ul style="list-style-type: none"> Background Investigations Business Units Locations and Departments Costs Education Credentials Course Completions CE Requirements CE Courses Third Party Certifications 	<ul style="list-style-type: none"> License Applications Comments Product Certifications Transaction History Professional Liability Securities Information Authorization Overrides Compensation Profile
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Key: = Fix Missing Required Information

Verify Sales Authorization
Review Siron Subscription

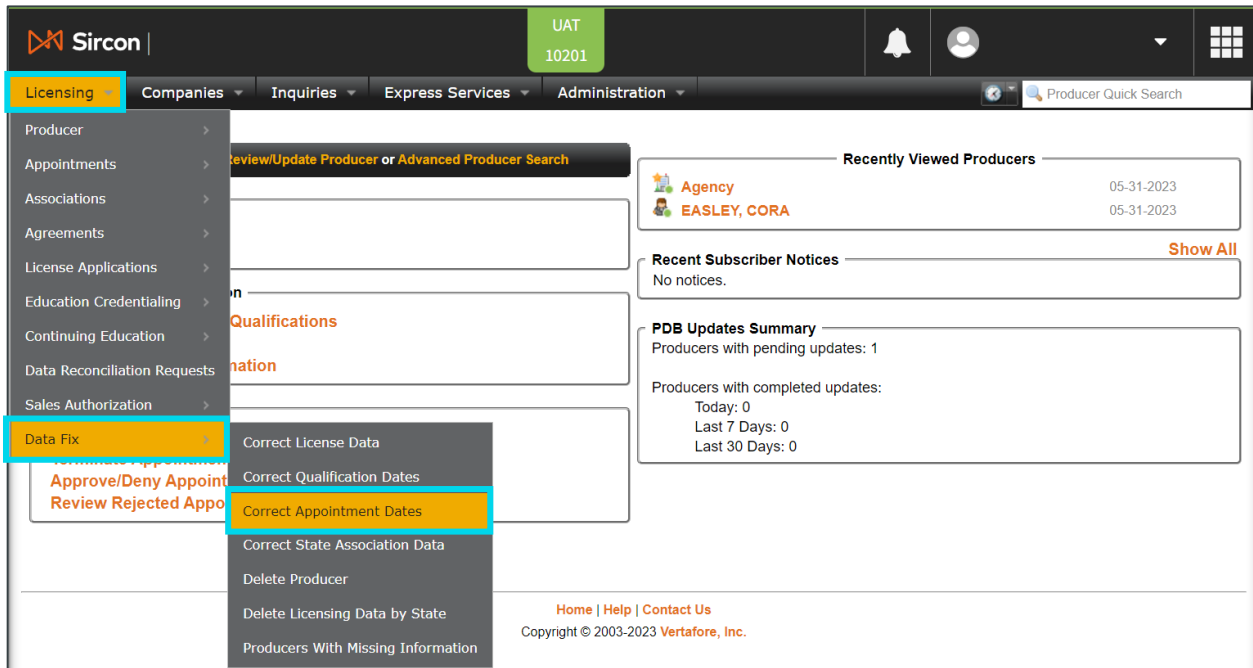
10. The qualification data will update within the producer record. If you need to send updates to the states, you will need to submit a license renewal or a license application through the Express Services functionality.

Washington	Insurance Producer	983150	06-01-2018	Active	06-01-2018	10-05-2023	<input type="checkbox"/>	Inactivate
Qualifications								
State	Qualification Type	Original Issue Date	Status	Effective Date	Expiration Date	Inactivation Reason		
Arizona	Accident & Health or Sickness	05-06-2023	Active	05-06-2023	05-06-2023		<input type="checkbox"/>	Inactivate
Arizona	Life	05-06-2023	Active	05-06-2023	05-24-2024		<input type="checkbox"/>	Inactivate
Arizona	Variable Life/Variable Annuity	05-06-2023	Active	05-06-2023	05-06-2023		<input type="checkbox"/>	Inactivate
California	Life Only	03-09-2015	Active	05-27-2015	10-05-2023		<input type="checkbox"/>	Inactivate
Colorado	Accident and Health	04-24-2012	Inactive	03-31-2014	03-31-2014	Canceled	<input type="checkbox"/>	

Correct Appointment Dates

Use the *Correct Appointment Dates* page to correct a selected producer's appointment data for one or multiple appointing companies in one or multiple states. You also can protect appointment data from being updated by an automated data reconciliation.

1. From the **Licensing** menu, select **Data Fix** and then select **Correct Appointment Dates**.

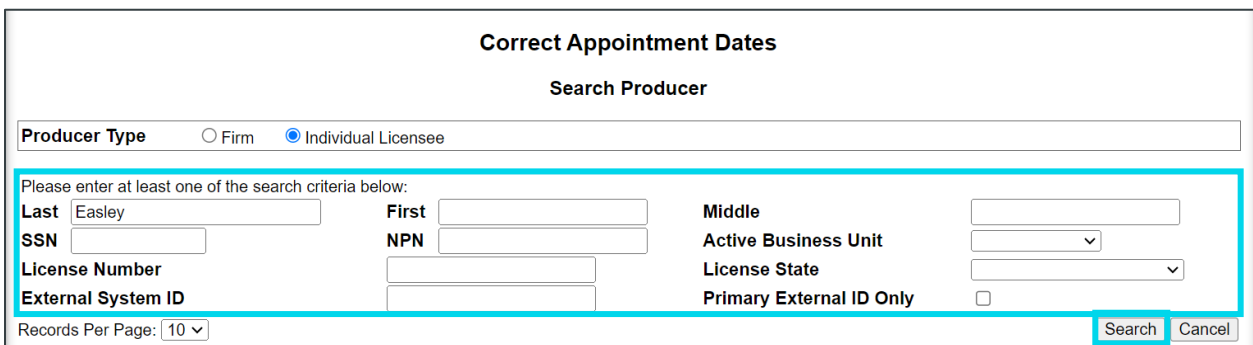


The screenshot shows the Sircon application interface. The top navigation bar includes the Sircon logo, a user profile dropdown, and a search bar. The 'Licensing' menu is open, showing options like 'Producer', 'Appointments', 'Associations', 'Agreements', 'License Applications', 'Education Credentialing', 'Continuing Education', 'Data Reconciliation Requests', and 'Sales Authorization'. The 'Data Fix' option is highlighted, and its sub-menu is open, showing options like 'Correct License Data', 'Correct Qualification Dates', 'Correct Appointment Dates' (highlighted), 'Correct State Association Data', 'Delete Producer', 'Delete Licensing Data by State', and 'Producers With Missing Information'. The main content area shows a 'Recently Viewed Producers' section with 'Agency' and 'EASLEY, CORA' listed, and a 'PDB Updates Summary' section.

2. You will now see the *Correct Appointment Dates Search Producer* page. Use at least one of the search criteria to locate a producer.

Note: In this example, we are using the **Last** name to locate the producer.

3. Click **Search**.

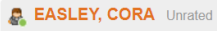


The screenshot shows the 'Correct Appointment Dates Search Producer' form. The form has a title 'Correct Appointment Dates' and a subtitle 'Search Producer'. Below the title, there is a 'Producer Type' section with radio buttons for 'Firm' and 'Individual Licensee' (selected). Below this, there is a section titled 'Please enter at least one of the search criteria below:' with several input fields: 'Last' (containing 'Easley'), 'First', 'Middle', 'SSN', 'NPN', 'Active Business Unit', 'License State', 'License Number', 'External System ID', and 'Primary External ID Only'. At the bottom left, there is a 'Records Per Page' dropdown set to '10'. At the bottom right, there are 'Search' and 'Cancel' buttons.

Section: Correct Appointment Dates

4. Next we will need to select the appointment you need to edit. You can choose to sort the appointments by the **State** or by the **Company**.
5. If you selected **State**, you will need to choose the **Appointment State** from the dropdown list.
6. Click **Next**.

Correct Appointment Dates


Search Producer

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
3050	ABCD	1000000028	VA / 736178	AZ / 1000000005

State Company

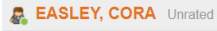
Select the Appointment State to correct Appointment Dates:

Appointment State: Arizona ▼

Next
Cancel

7. If you chose **Company**, select the **Appointment Companies** then click **Next**.

Correct Appointment Dates


Search Producer

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
3050	ABCD	1000000028	VA / 736178	AZ / 1000000005

State Company

Select the Appointment Company to correct Appointment Dates:

Appointment Companies

EIN	NAIC ID	Company	Status	Effective Date	
<input checked="" type="radio"/>	12-3456789	12345	Acme Insurance Writing Company	Active	06-05-2023

Next
Cancel

8. You will now see the **Current Appointments**. Click the appointment you need to modify.
9. Update any of the data in the fields below:
 - **Active Date:** Enter the date on which the appointment is recorded became active.
 - **Termination Date:** Enter the date on which the appointment was terminated.
 - **Termination Notification Date:** Enter the date on which the termination notification was recorded as having been transmitted to the producer.
 - **Locked from Data Reconciliation:** Click to the checkbox to protect appointment data on the selected producer record from being overwritten by an automated data reconciliation operation, such as the daily PDB sync.
10. Click the **Save and Return to Record** button.

Section: Correct Appointment Dates

Correct Appointment Dates

[Search Producer](#)

EASLEY, CORA Unrated

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
3050	ABCD	1000000028	VA / 736178	AZ / 1000000005

Appointment State

State

Arizona

Select the Appointment(s) to correct:

Current Appointments

	Company Name	NAIC ID	Appointment Type	Status	Active Date	Termination Date	Term Notif Date	Termination Reason
<input checked="" type="checkbox"/>	Acme Insurance Writing Company	12345	Doesn't Appoint By LOA	Active	07-07-2023			

Active Date

Termination Date

Termination Notification Date

Locked from Data Reconciliation Updates

11. Navigate to the producer record, then click **Appointments**.

UAT 10201

Licensing Companies Inquiries Express Services Administration
Producer Quick Search

Review/Update Individual

[Search Producer](#)

EASLEY, CORA Unrated

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
3050	ABCD	1000000028	VA / 736178	AZ / 1000000005

Expand All

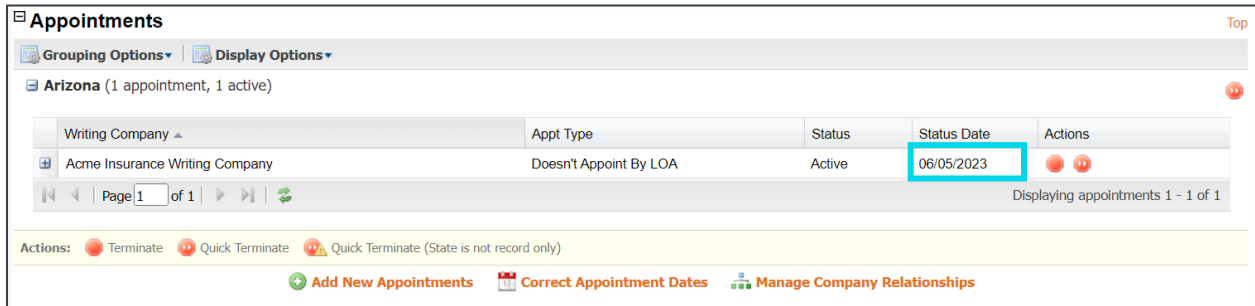
<ul style="list-style-type: none"> Individual Details Producer Business Rules Resident States External Sys IDs Contact Information Address History Email Messages Licenses/Qualifications <li style="border: 2px solid cyan; padding: 2px;">Appointments 	<ul style="list-style-type: none"> Agreements Firm Associations Employment History Aliases Data Reconciliation State Producer Numbers Education/Prof. Design. FINRA Information Required Items 	<ul style="list-style-type: none"> Background Investigations Business Units Locations and Departments Costs Education Credentials Course Completions CE Requirements CE Courses Third Party Certifications 	<ul style="list-style-type: none"> License Applications Comments Product Certifications Transaction History Professional Liability Securities Information Authorization Overrides Compensation Profile
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Individual Details Top

Indv ID	Status	Eff Date	Term Date	Licensee
2984643	Active	06-05-2023		<input checked="" type="checkbox"/>

Section: Correct Appointment Dates



12. The date will be updated in the producer record.






Appointments Top




Grouping Options | Display Options

Arizona (1 appointment, 1 active)

Writing Company	Appt Type	Status	Status Date	Actions
Acme Insurance Writing Company	Doesn't Appt By LOA	Active	06/05/2023	 

Page 1 of 1 | Displaying appointments 1 - 1 of 1

Actions:  Terminate  Quick Terminate  Quick Terminate (State is not record only)

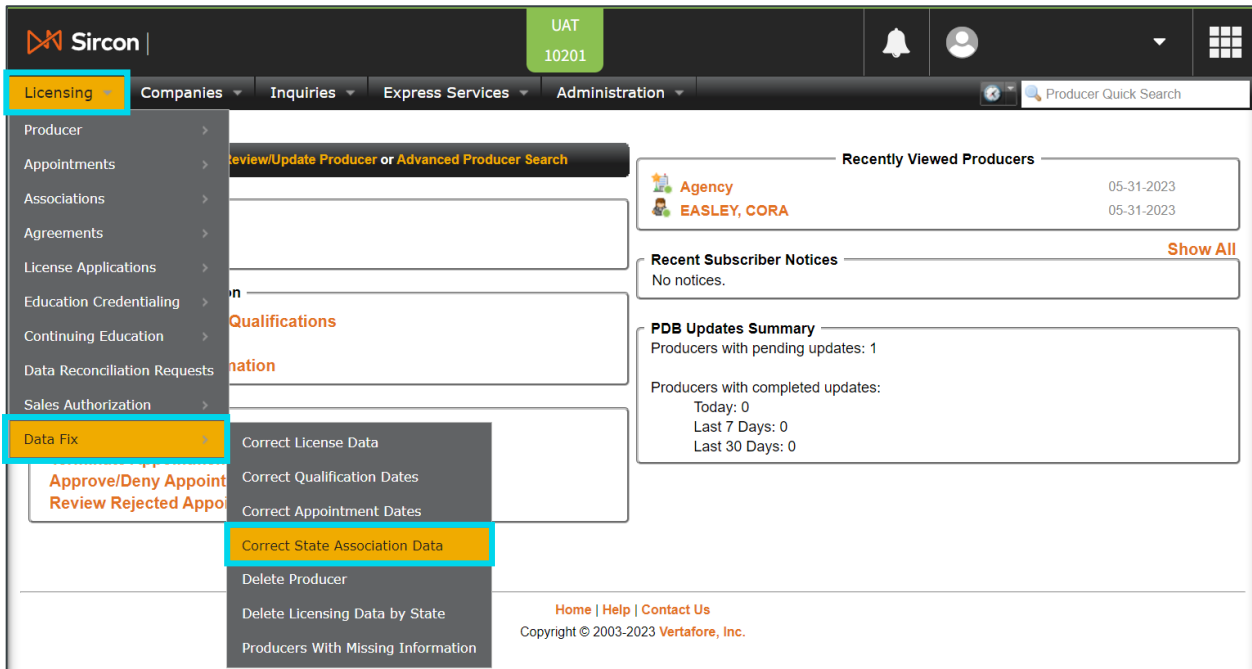
 Add New Appointments  Correct Appointment Dates  Manage Company Relationships

Correct State Association Data

Use the *Correct State Association Data* page to correct individual-to-firm association information in a selected state.

Note: Associations are manually updated/maintained in Producer Central.

- From the **Licensing** menu, select **Data Fix** and then select **Correct State Association Dates**.

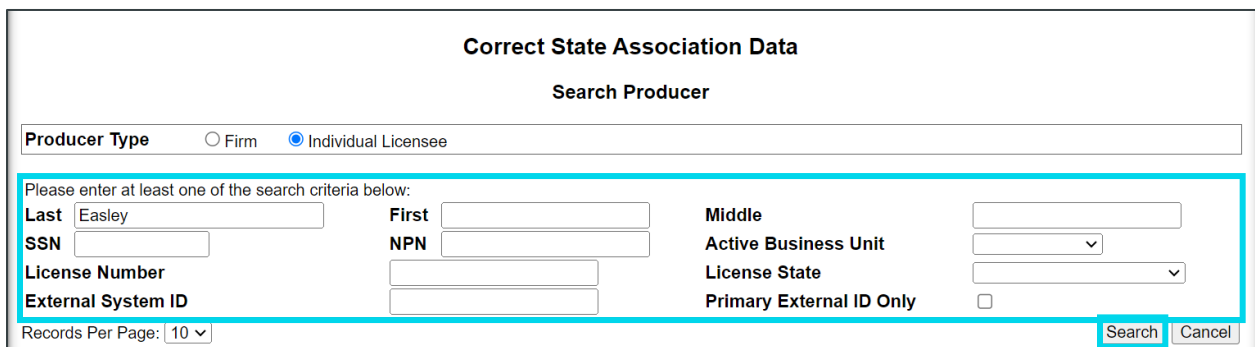


The screenshot shows the Vertafore Producer Central interface. The top navigation bar includes the Sircon logo, user information (UAT 10201), and a search bar. The main menu is open, highlighting the 'Licensing' section. Under 'Licensing', the 'Data Fix' option is selected, and its sub-menu is displayed, with 'Correct State Association Data' highlighted. Other sub-menu items include 'Correct License Data', 'Correct Qualification Dates', 'Correct Appointment Dates', 'Delete Producer', 'Delete Licensing Data by State', and 'Producers With Missing Information'. The background shows a dashboard with sections for 'Recently Viewed Producers' (listing Agency EASLEY, CORA), 'Recent Subscriber Notices', and 'PDB Updates Summary'.

- You will now see the *Correct State Association Data Search Producer* page. Use at least one of the search criteria to locate a producer.

Note: In this example, we are using the **Last** name to locate the producer.

- Click **Search**.



The screenshot shows the 'Correct State Association Data Search Producer' form. At the top, it says 'Search Producer'. Below this, there is a 'Producer Type' section with radio buttons for 'Firm' and 'Individual Licensee' (which is selected). A text box prompts the user to 'Please enter at least one of the search criteria below:'. The search criteria include:

- Last: Easley
- SSN: [empty]
- License Number: [empty]
- External System ID: [empty]
- First: [empty]
- NPN: [empty]
- Middle: [empty]
- Active Business Unit: [dropdown]
- License State: [dropdown]
- Primary External ID Only: [checkbox]

 At the bottom left, there is a 'Records Per Page' dropdown set to 10. At the bottom right, there are 'Search' and 'Cancel' buttons.

Section: Correct State Association Data


- Next, search the name of the **Firm** that you need to update using at least one of the search criteria listed below.

Note: In this example, we are using the **Firm Name** to locate the producer.

- Click **Search**.

Correct State Association Data

Individual

 **EASLEY, CORA** Unrated
Search Producer

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
3050	ABCD	1000000028	VA / 736178	<input type="checkbox"/> AZ / 1000000005

Search Firm

Please enter at least one of the search criteria below:

Firm Name	<input type="text" value="Branch Office"/>		
EIN	<input type="text"/>	NPN	<input type="text"/>
License Number	<input type="text"/>	License State	<input type="text" value=""/>
External System ID	<input type="text"/>	Primary External ID Only	<input type="checkbox"/>

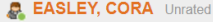
Records Per Page:
Search
Cancel

- You will see the Association States associated with the agency/firm. Click the checkbox next to the association then update any of the following fields:
 - Association State:** State where the agent and firm are associated. The firm will need to have an active qualification in the state you select.
 - Association Type:** Choose the association type from the drop-down list. This displays the relationship of the individual to the firm in the selected association state. The options in the association type are maintained with code use indicators.
 - Position:** Displays the employment title of the individual with the firm in the selected association state.
 - Begin Date:** Displays the date on which the individual became associated with the firm in the selected association state.
 - State Registered:**
 - Displays "Yes" if the individual-to-firm association is recorded with the department of insurance in the selected association state.
 - Displays "No" if the individual-to-firm association is not recorded with the department of insurance in the selected association state (i.e., recorded only in your company's internal records).
- Click **Save** or **Save and Return** to submit the association.

Section: Correct State Association Data


Correct State Association Data

Individual


 [Search Producer](#)

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
3050	ABCD	1000000028	VA / 736178	AZ / 1000000005

Firm

 [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.

Current Association

Begin Date	End Date
02-05-2023	

Select the State Association(s) to correct:

Association States

State	Association Type	Position	Begin Date	End Date	State Registered
<input checked="" type="checkbox"/> Arizona	Agent	Other	02-05-2023		No

Association Type

Position

Begin Date

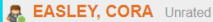
End Date

State Registered Yes No

8. Navigate to the producer record by clicking the **Producer Name**.

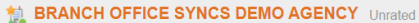
Correct State Association Data

Individual


 [Search Producer](#)

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
3050	ABCD	1000000028	VA / 736178	AZ / 1000000005

Firm

 [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.

Current Association

Begin Date	End Date
02-05-2023	

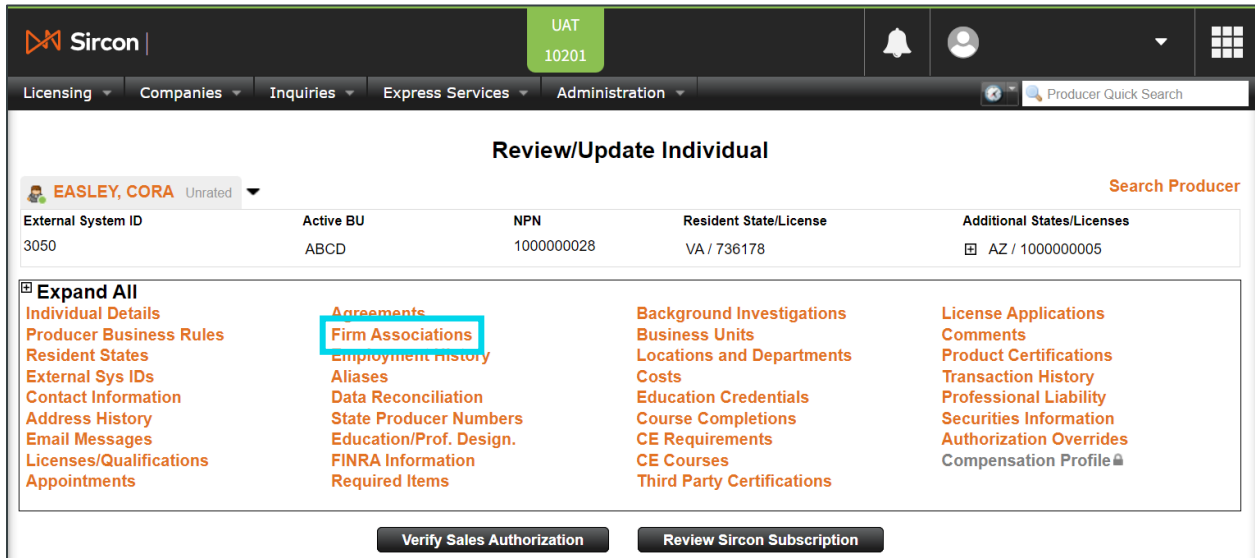
Select the State Association(s) to correct:

Association States

State	Association Type	Position	Begin Date	End Date	State Registered
<input checked="" type="checkbox"/> Arizona	Agent	Other	02-05-2023		No

Section: Correct State Association Data

9. Click the **Firm Associations** quick link.



Review/Update Individual

EASLEY, CORA Unrated Search Producer

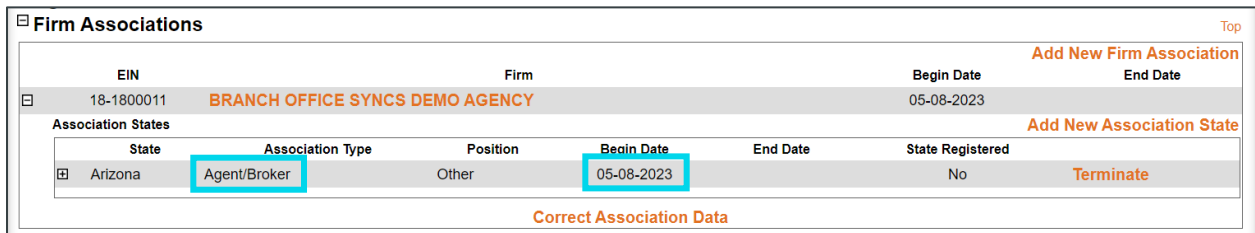
External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
3050	ABCD	1000000028	VA / 736178	AZ / 1000000005

Expand All

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

10. The State Association data will update on the producer record.



Firm Associations Top

[Add New Firm Association](#)

EIN	Firm	Begin Date	End Date
18-1800011	BRANCH OFFICE SYNCs DEMO AGENCY	05-08-2023	

[Add New Association State](#)

State	Association Type	Position	Begin Date	End Date	State Registered	
Arizona	Agent/Broker	Other	05-08-2023		No	Terminate

Correct Association Data

Delete Producer

Use the *Delete Producer* page to purge an inactive producer record entirely from Producer Central. Once you delete a producer, their data will be removed from the system.

Note: You can add the producer back to Producer Central, but the historical updates (such as producer record comments, business units, or external system IDs) will no longer be available.

We do not recommend deleting producers unless it is absolutely necessary as it can cause compliance issues in the event of a company audit. The only time you may need to delete producers is to resolve troubleshooting issues.


Some common instances when you may need to delete a producer are when:


- Duplicate producer records exist in Producer Central.
- A producer contains issues that can't be solved with other means.
- The producer records need deleted due to your company retention policy.


Note: Before you can delete the producer, you will need to make sure the producer is disconnected.


The system prevents you from deleting a producer record with a record status of Active. If you cannot delete a record, check to make sure all the producer's licenses, qualifications, appointments, and firm associations are terminated or inactivated.






Review/Update Individual


 **Producer Disconnected**
Some features may be disabled.

 **CHARRON, SUSIE** Unrated ▼
Search Producer

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
		000111999		
 This producer has invalid information or is missing required information.				

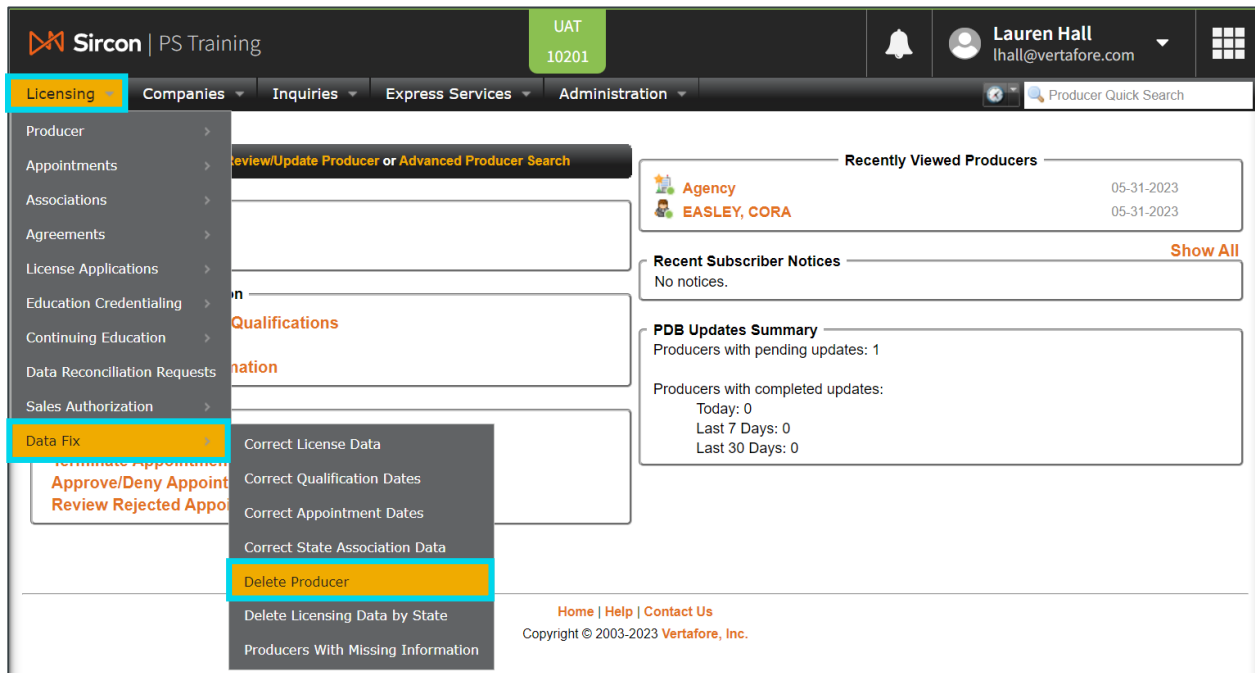
 **Expand All**

<ul style="list-style-type: none"> Individual Details Producer Business Rules Resident States  External Sys IDs  Contact Information  Address History Email Messages Licenses/Qualifications Appointments 	<ul style="list-style-type: none"> Agreements Firm Associations Employment History Aliases Data Reconciliation State Producer Numbers Education/Prof. Design. FINRA Information Required Items 	<ul style="list-style-type: none"> Background Investigations Business Units  Locations and Departments Costs Education Credentials Course Completions CE Requirements CE Courses Third Party Certifications 	<ul style="list-style-type: none"> License Applications Comments Product Certifications Transaction History Professional Liability Securities Information Authorization Overrides Compensation Profile 
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Key:  = Fix Missing Required Information

Section: Delete Producer

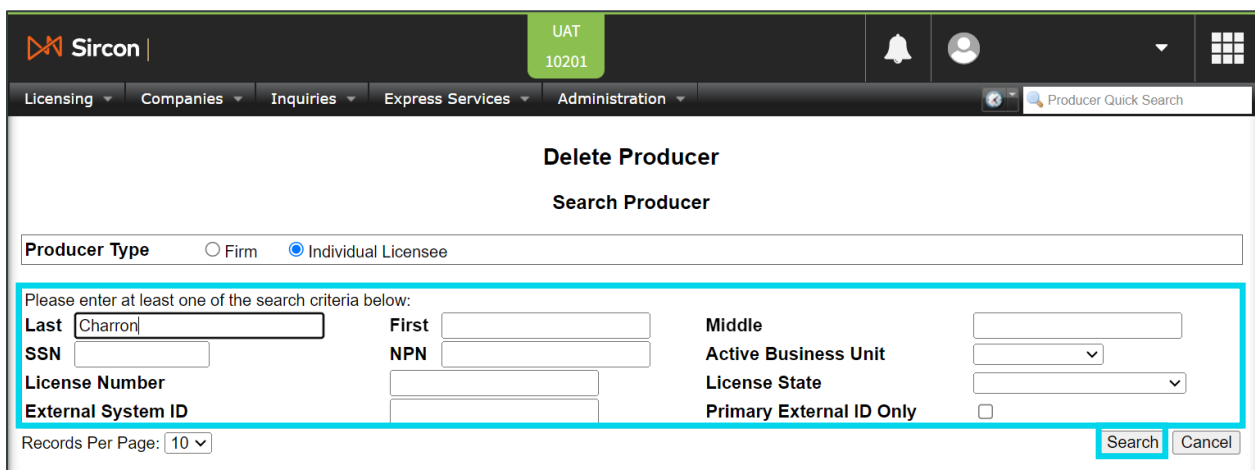
1. From the **Licensing** menu, select **Data Fix** and then select **Delete Producer**.



2. You will now see the *Delete Producer Search Producer* page. Use at least one of the search criteria to locate a producer.

Note: In this example, we are using the **Last** name to locate the producer.


3. Click **Search**.




4. You will now see the producer details.
5. Click **Delete**.

Section: Delete Producer

Delete Producer

 **CHARRON, SUSIE** Unrated
Search Producer

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
		000111999		

 This producer has invalid information or is missing required information.

Individual Details

Indv ID	2993107	License Status	Pending	Eff Date	07-07-2023	Term Date		<input checked="" type="checkbox"/> Licensee
Last	CHARRON	First	SUSIE	Middle		Suffix		
SSN		NPN	000111999	<input type="checkbox"/> Bank Affiliated		<input type="checkbox"/> Captive		
Birth Date	05-09-1979	Birth State						
Birth Province		Birth Country						
Ethnicity								
Fingerprint ID		Loss of Contact		Last Sync Date				
Gender		Deceased Date		Height		inches		
Hair Color		Eye Color		Weight		lbs		

Resident States

No Resident State exists.

Delete
Return

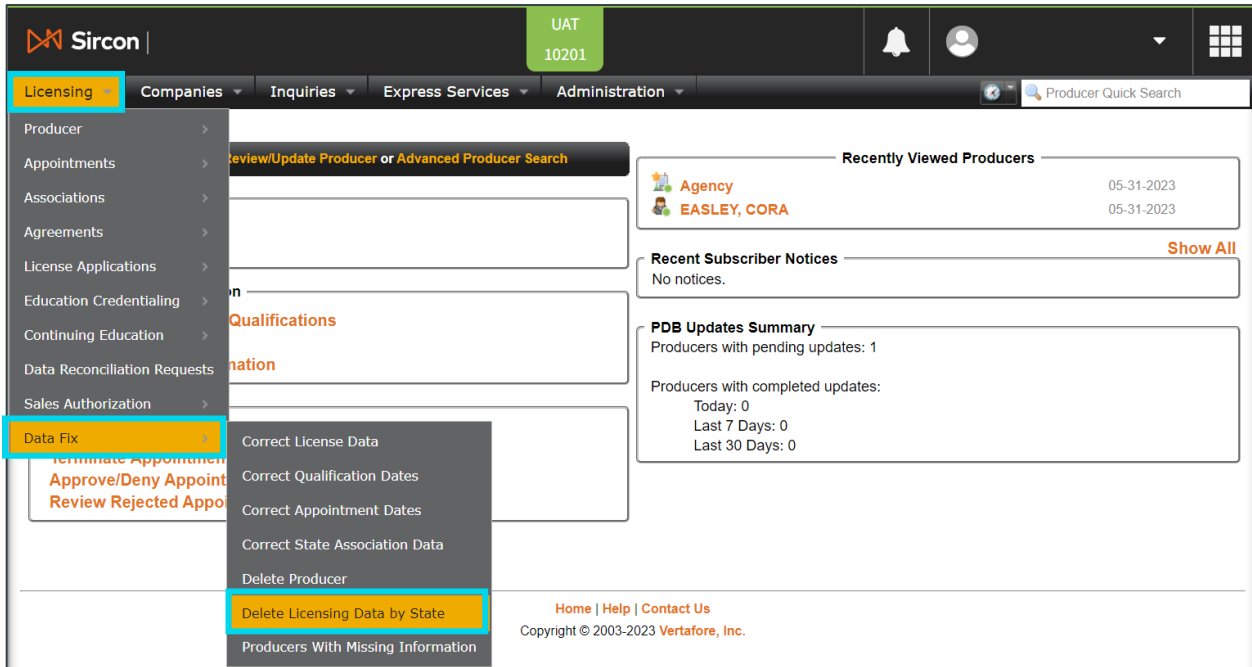
6. The producer record will be removed from Producer Central.

Delete Licensing Data by State

Use the *Delete Licenses, Qualifications and Appointments by State* page to purge a producer record inactive license, qualification, and appointment information for a particular state.

You may need to use this feature if your company or the producer no longer does business in a particular state.

1. From the **Licensing** menu, select **Data Fix** and then select **Delete Licensing Data by State**.



The screenshot shows the Sircon application interface. The top navigation bar includes the Sircon logo, a user profile dropdown, and a notification bell. The main navigation menu is open, showing 'Licensing' selected. Under 'Licensing', the 'Data Fix' option is highlighted, and its sub-menu is displayed, with 'Delete Licensing Data by State' selected. The main content area shows a 'Recently Viewed Producers' section with one entry: 'Agency EASLEY, CORA' dated 05-31-2023. There are also sections for 'Recent Subscriber Notices' (No notices) and 'PDB Updates Summary' (Producers with pending updates: 1; Today: 0; Last 7 Days: 0; Last 30 Days: 0). The footer contains 'Home | Help | Contact Us' and 'Copyright © 2003-2023 Vertafore, Inc.'

2. You will now see the *Delete Licensing Data by State* page. Use at least one of the search criteria below to locate a producer.

Note: In this example, we are using the **Last** name to locate the producer.

3. Click **Search**.

Section: Delete Licensing Data by State

Delete Licensing Data by State

Search Producer

Producer Type Firm Individual Licensee

Please enter at least one of the search criteria below:

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

Records Per Page:

4. Select the **Licensed States** that you need to delete from the dropdown list.

Delete Licenses, Qualifications and Appointments By State

Search Producer

EASLEY, CORA Unrated

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
3050	ABCD	1000000028	VA / 736178	AZ / 1000000005

Licensed States

- Arizona
- California
- Colorado
- Delaware
- District of Columbia
- Florida
- Idaho
- Maine
- Maryland
- Massachusetts
- Michigan
- New Jersey
- New Mexico
- North Carolina
- Ohio
- Pennsylvania
- Tennessee
- Virginia
- Washington

License State	License Type	License Number	Original Issue Date	Status	Effective Date	Expiration Date	Inactivation Reason	Copy Rec'd
Arizona	Insurance Producer	1000000005	02-06-2023	Active	05-06-2023			<input type="checkbox"/>

State	Qualification Type	Original Issue Date	Status	Effective Date	Expiration Date	Inactivation Reason
Arizona	Accident & Health or Sickness	05-06-2023	Inactive	03-31-2018	05-06-2023	
Arizona	Life	05-06-2023	Inactive	03-31-2018	05-24-2024	
Arizona	Variable Life/Variable Annuity	05-06-2023	Inactive	03-31-2018	05-06-2023	

State	Company Name	Appointment Date	Status	Status Date	Shared Producer Name
Arizona	Acme Insurance Writing Company	Doesn't Appear By LO	Inactive	06-03-2023	

5. Click **Delete**.

Delete Licenses, Qualifications and Appointments By State

Search Producer

EASLEY, CORA Unrated

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
3050	ABCD	1000000028	VA / 736178	AZ / 1000000005

Licensed States

License State	License Type	License Number	Original Issue Date	Status	Effective Date	Expiration Date	Inactivation Reason	Copy Rec'd
Tennessee	Insurance Producer	2325195	01-18-2016	Inactive	03-31-2018	03-31-2018	Canceled	<input type="checkbox"/>

State	Qualification Type	Original Issue Date	Status	Effective Date	Expiration Date	Inactivation Reason
Tennessee	Accident and Health	01-18-2016	Inactive	03-31-2018	03-31-2018	Canceled
Tennessee	Life	01-18-2016	Inactive	03-31-2018	03-31-2018	Canceled

Appointments
No Appointment exists.

Section: Delete Licensing Data by State

- After you click the **Delete** button, the system will not issue a confirmation message before deleting the licensing data.

<input type="checkbox"/>	Arizona	 Insurance Producer	1000000005	02-06-2023	Active	05-06-2023	05-06-2023	<input type="checkbox"/>	Inactivate
<input type="checkbox"/>	California	Non-Res Insurance Producer	0C52119	01-26-1999	Active	05-27-2015	10-05-2023	<input type="checkbox"/>	Inactivate
<input type="checkbox"/>	Colorado	Non-Resident Producer	398256	04-24-2012	Inactive	03-31-2014	03-31-2014	Canceled	<input type="checkbox"/>
<input type="checkbox"/>	Delaware	Insurance Producer	3000565515	05-30-2023	Active	05-30-2023	10-05-2023	<input type="checkbox"/>	Inactivate
<input type="checkbox"/>	District of Columbia	Insurance Producer	155160	03-23-2012	Active	03-30-2020	10-05-2023	<input type="checkbox"/>	Inactivate
<input type="checkbox"/>	Florida	Non-Resident Agent	W448056	10-24-2017	Active	10-24-2017	12-31-2024	<input type="checkbox"/>	Inactivate
<input type="checkbox"/>	Idaho	Non-Resident Producer	330290	10-27-2009	Active	04-11-2014	10-05-2023	<input type="checkbox"/>	Inactivate
<input type="checkbox"/>	Maine	Non-Resident Producer	PRN291771	08-12-2017	Active	08-12-2017	12-31-2024	<input type="checkbox"/>	Inactivate
<input type="checkbox"/>	Maryland	Insurance Producer	5438	07-01-1985	Active	01-21-2020	10-05-2023	<input type="checkbox"/>	Inactivate
<input type="checkbox"/>	Massachusetts	Individual Producer	1996312	01-14-2016	Active	01-14-2016	10-05-2023	<input type="checkbox"/>	Inactivate
<input type="checkbox"/>	Michigan	Non-Resident Producer	1000000005	04-13-2016	Active	04-13-2016	12-31-2024	<input type="checkbox"/>	Inactivate
<input type="checkbox"/>	New Jersey	Insurance Producer	90577	08-18-2015	Active	08-18-2015	10-05-2023	<input type="checkbox"/>	Inactivate
<input type="checkbox"/>	New Mexico	Insurance Producer	1000000005	05-08-2009	Active	05-08-2009	10-05-2023	<input type="checkbox"/>	Inactivate
<input type="checkbox"/>	North Carolina	Insurance Producer	1000000005	08-18-2015	Active	02-04-2016	03-31-2024	<input type="checkbox"/>	Inactivate
<input type="checkbox"/>	Ohio	Major Lines	836226	02-14-2011	Inactive	03-31-2013	03-31-2013	Canceled	<input type="checkbox"/>
<input type="checkbox"/>	Pennsylvania	Non-Res Producer Individual	573305	04-06-2010	Active	04-06-2010	10-05-2023	<input type="checkbox"/>	Inactivate
<input type="checkbox"/>	Virginia	Insurance Producer	736178	07-24-1975	Active	07-24-1975	12-31-2024	<input type="checkbox"/>	Inactivate
<input type="checkbox"/>	Washington	Insurance Producer	983150	06-01-2018	Active	06-01-2018	10-05-2023	<input type="checkbox"/>	Inactivate

APPENDIX 1: Sircon for Carriers Help Resources

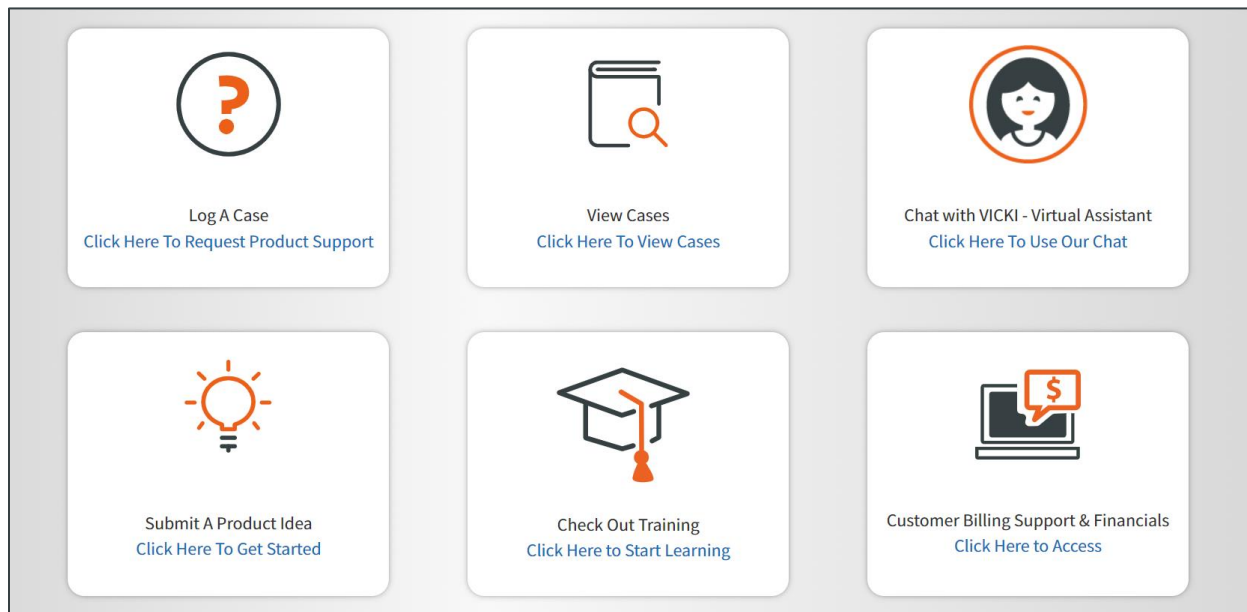
Help is just a click away. Vertafore has two resources available to support you 24/7:

- My Vertafore
- Sircon Support

My Vertafore

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

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



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

Contact Vertafore Customer Support

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

APPENDIX 2: Document History

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



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