



POWERING
YOUR
POSSIBLE.

SIRCON FOR CARRIERS

Data Reconciliation

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Overview

Introduction and Background

Data reconciliation is the process of reviewing producer data that was synced from external data sources. Producer Central updates data in a producer record with information obtained from a trusted, external data source, such as the:

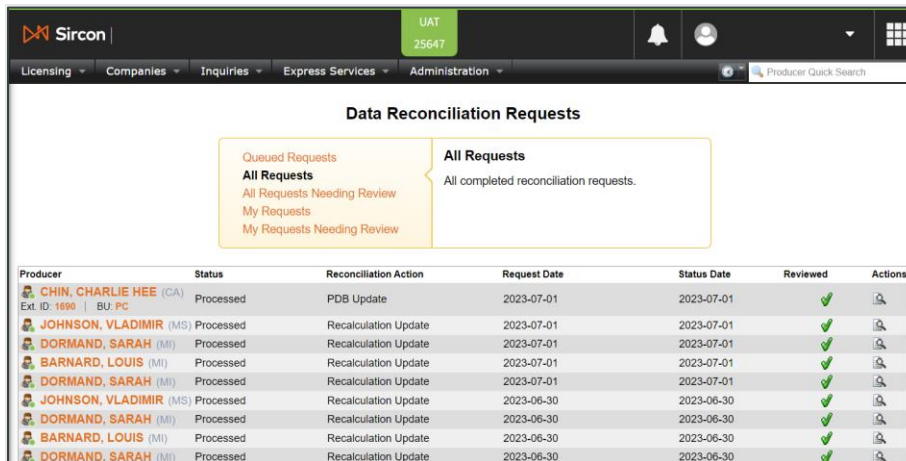
- Producer Database (PDB)
- State regulatory databases
- Producer education course completion clearinghouses

Automated data reconciliations keep your producer records refreshed and in a state of constant synchronization with state regulations. Automated data reconciliation operations may be initiated in many ways:

- Manually through the Add Producer, Add Producers in Bulk, or the Quick Add Bulk functions
- Automatically through the daily Producer Database (PDB) syncs
- Manually during a bulk appointment, bulk termination, or bulk business data update operation
- Automatically as part of an onboarding or maintenance transaction request, which can be manually initiated or initiated externally in the Onboarding & Self-Service module of Sircon for Carriers

At times, Producer Central encounters conflicting data, errors, or other issues during the data syncs. Most of the conflicts are automatically resolved for you using Producer Central's processing logic which cross references state rules and regulations. However, there may be issues you encounter that require your attention.

All automated data reconciliation requests, regardless of their origin, are logged for your review and follow-up on the *Data Reconciliation Requests* page.



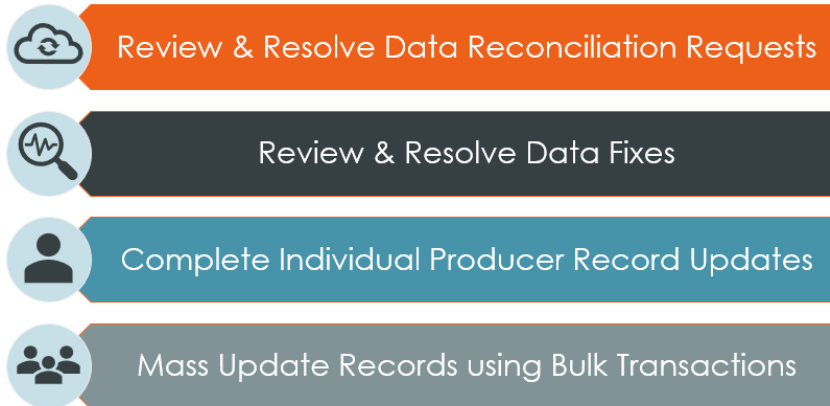
Producer	Status	Reconciliation Action	Request Date	Status Date	Reviewed	Actions
CHIN, CHARLIE HEE (CA) Ext. ID: 1690 BU: PC	Processed	PDB Update	2023-07-01	2023-07-01	✓	🔍
JOHNSON, VLADIMIR (MS)	Processed	Recalculation Update	2023-07-01	2023-07-01	✓	🔍
DORMAND, SARAH (MI)	Processed	Recalculation Update	2023-07-01	2023-07-01	✓	🔍
BARNARD, LOUIS (MI)	Processed	Recalculation Update	2023-07-01	2023-07-01	✓	🔍
DORMAND, SARAH (MI)	Processed	Recalculation Update	2023-07-01	2023-07-01	✓	🔍
JOHNSON, VLADIMIR (MS)	Processed	Recalculation Update	2023-06-30	2023-06-30	✓	🔍
DORMAND, SARAH (MI)	Processed	Recalculation Update	2023-06-30	2023-06-30	✓	🔍
BARNARD, LOUIS (MI)	Processed	Recalculation Update	2023-06-30	2023-06-30	✓	🔍
DORMAND, SARAH (MI)	Processed	Recalculation Update	2023-06-30	2023-06-30	✓	🔍

Section: Overview

From there you can review all processed, pending, and errored automated data reconciliation requests. You can also cancel pending requests and resolve reconciliation errors.

Reviewing data reconciliation requests is one of the steps that falls under the Maintain Producer Data process. It is important to regularly review the Data Reconciliation queue to ensure producer data remains up to date.

Maintain Producer Data



What will be covered?

In this quick guide, we will learn how to:

- Review data reconciliation requests.
- Cancel pending requests.
- Resolve common data reconciliation errors.

Who should use this document?

Any user that needs to review or resolve data reconciliation requests in Producer Central.

When should you use this document?

Use this document as a reference whenever you need to review or resolve data reconciliation requests.

Review Data Reconciliation Requests

In this section, we will learn how to review data reconciliation requests.

There are two ways to see reconciliation requests:

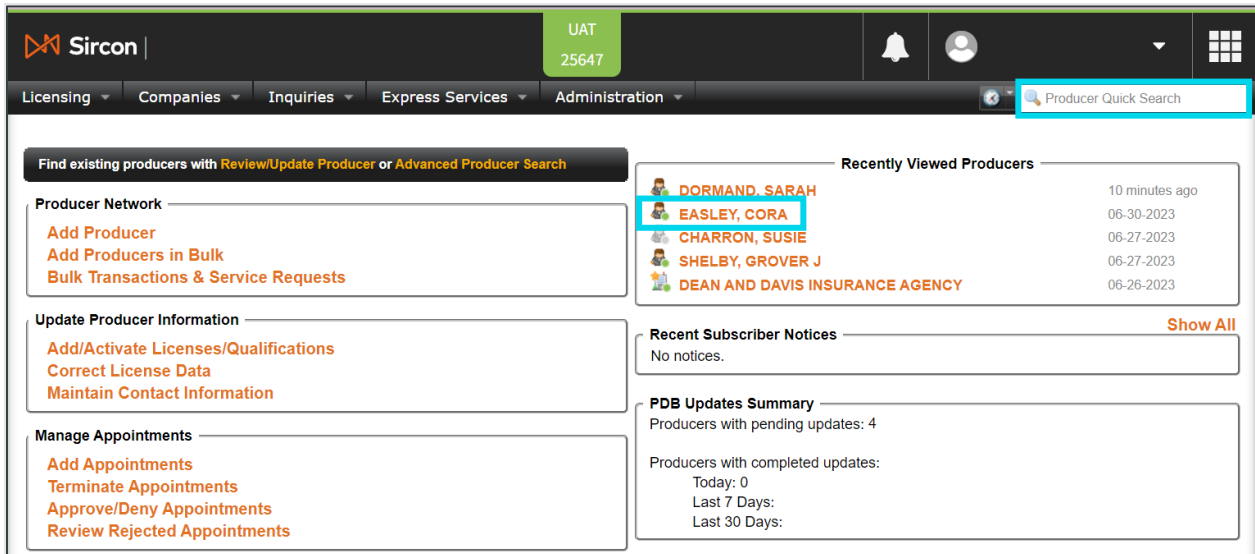
1. Review the Individual Producer Record
2. Review the Data Reconciliation Queue

Review an Individual Producer Record

Use this process if you need to review data reconciliations for an individual producer.

1. Navigate to the *Review/Update Producer* screen by searching for the producer or clicking the **Producer Name** from the **Recently Viewed Producers** section.

Note: For more details about how to search for producers, refer to the [Adding and Searching for Producers Quick Guide](#).

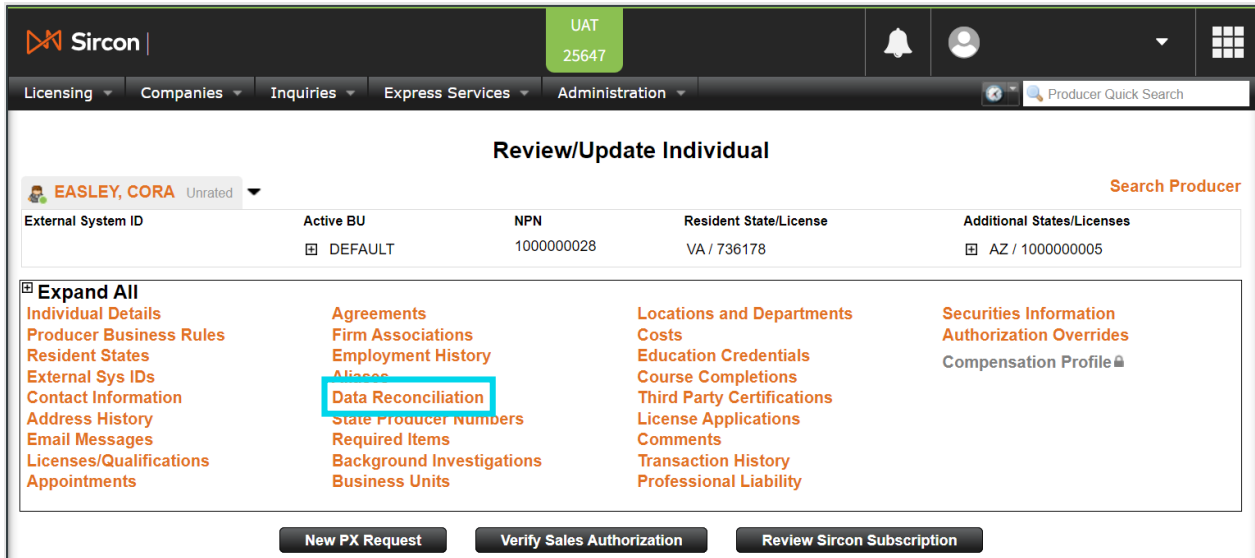


The screenshot shows the Siron application interface. At the top, there is a navigation bar with the Siron logo, a user profile icon, and a search bar labeled 'Producer Quick Search'. Below the navigation bar, there are several sections:

- Find existing producers with Review/Update Producer or Advanced Producer Search**: A search bar.
- Producer Network**: A list of links: 'Add Producer', 'Add Producers in Bulk', and 'Bulk Transactions & Service Requests'.
- Update Producer Information**: A list of links: 'Add/Activate Licenses/Qualifications', 'Correct License Data', and 'Maintain Contact Information'.
- Manage Appointments**: A list of links: 'Add Appointments', 'Terminate Appointments', 'Approve/Deny Appointments', and 'Review Rejected Appointments'.
- Recently Viewed Producers**: A table with the following data:

Producer Name	Last Viewed
DORMAND, SARAH	10 minutes ago
EASLEY, CORA	06-30-2023
CHARRON, SUSIE	06-27-2023
SHELBY, GROVER J	06-27-2023
DEAN AND DAVIS INSURANCE AGENCY	06-26-2023
- Recent Subscriber Notices**: A section with the text 'No notices.' and a 'Show All' link.
- PDB Updates Summary**: A section with the text 'Producers with pending updates: 4' and 'Producers with completed updates: Today: 0, Last 7 Days: , Last 30 Days: '.

2. You will now see the *Review/Update Producer* screen.
3. Click the **Data Reconciliation** quick link to navigate to the section.



Review/Update Individual

EASLEY, CORA Unrated

External System ID: [icon] DEFAULT Active BU: 1000000028 Resident State/License: VA / 736178 Additional States/Licenses: [icon] AZ / 1000000005

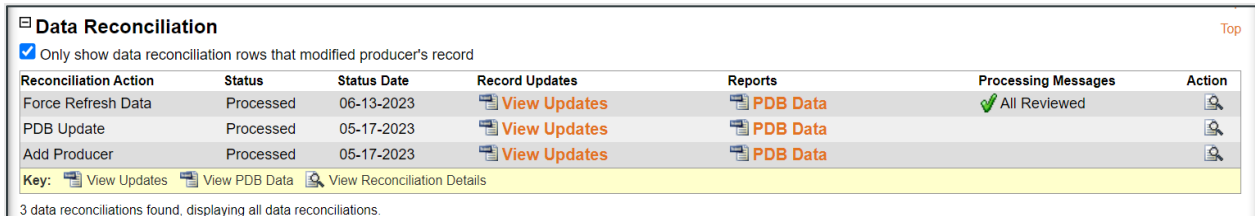
Expand All

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

New PX Request Verify Sales Authorization Review Siron Subscription

4. The **Data Reconciliation** data section includes the following fields:

- **Reconciliation Action:** Displays the specific system function that triggered the reconciliation (e.g., Add Producer or PDB Updates).
- **Status:** The current status of the operation (e.g., Processed, Error, Pending, or Running).
- **Status Date:** Date the status was last updated.
- **Record Updates:** Click the **View Updates** button (📄) to view the data that was updated based on the reconciliation source.
- **Reports:** Click the **View PDB Data** button (📄) to view the report from the external source of data that the system used to update the producer record.
- **Action:** Click the **View Reconciliation Data** button (🔍) to open an overview of the sync process (status, errors, etc.) This will show errors that need to be reviewed as well as those that were automatically resolved by the system. Record changes would be viewed by clicking "View Updates".



Data Reconciliation Top

Only show data reconciliation rows that modified producer's record

Reconciliation Action	Status	Status Date	Record Updates	Reports	Processing Messages	Action
Force Refresh Data	Processed	06-13-2023	View Updates	PDB Data	✔ All Reviewed	
PDB Update	Processed	05-17-2023	View Updates	PDB Data		
Add Producer	Processed	05-17-2023	View Updates	PDB Data		

Key: View Updates View PDB Data View Reconciliation Details

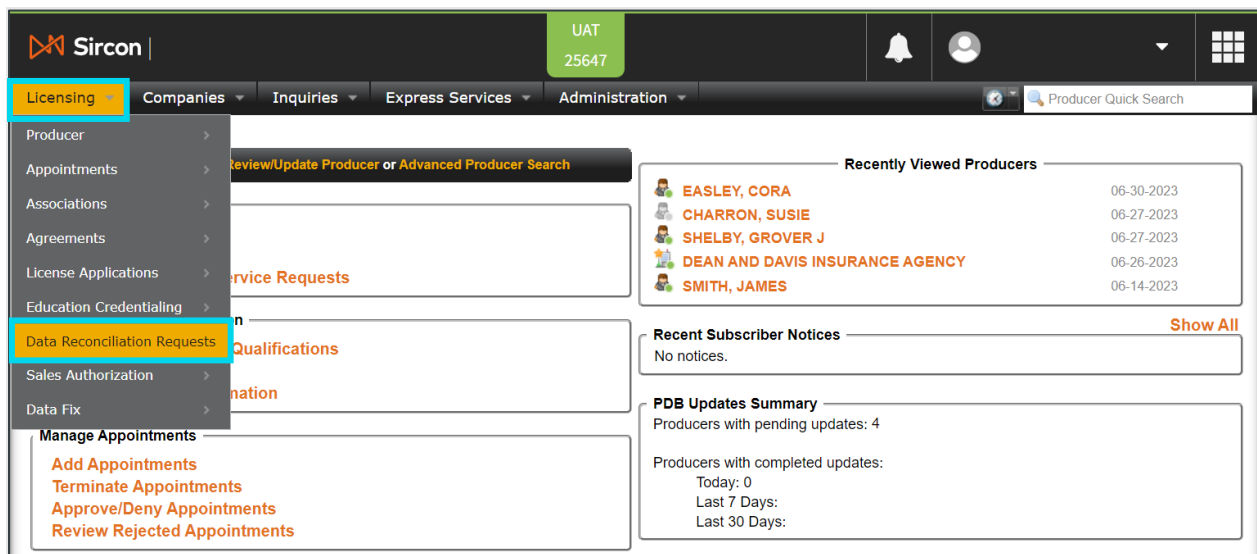
3 data reconciliations found, displaying all data reconciliations.

Review Data Reconciliation Queue

Producer Central keeps a history of all the data reconciliations that were processed in the Data Reconciliation queue. From here, you can see a record of the producers that received data updates from syncs as well as the specific data that was updated (such as appointment or license information).

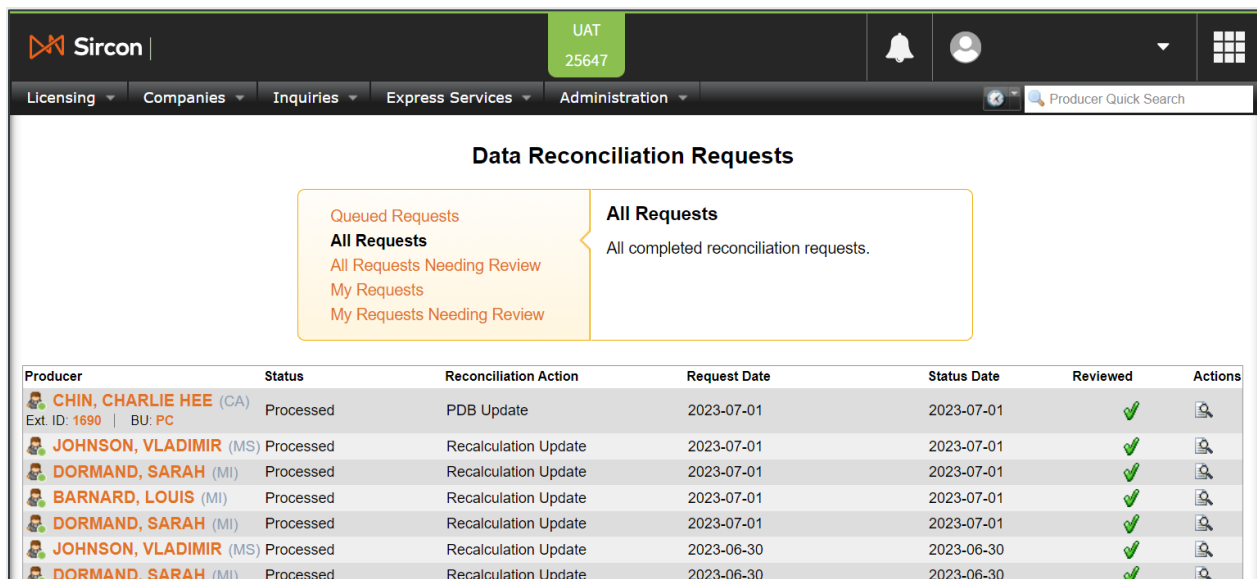
You can also see any data reconciliations that contain errors and need reviewed and corrected.

1. To navigate to the queue, click the **Licensing** tab then click **Data Reconciliation Requests**.



The screenshot shows the Siron application interface. The top navigation bar includes the Siron logo, a user profile dropdown with 'UAT 25647', a notification bell, and a search icon. Below the navigation bar, the 'Licensing' tab is selected and highlighted in orange. A dropdown menu is open under 'Licensing', showing options like 'Producer', 'Appointments', 'Associations', 'Agreements', 'License Applications', 'Education Credentialing', 'Data Reconciliation Requests' (highlighted in orange), 'Sales Authorization', and 'Data Fix'. Below the menu, there are sections for 'Recently Viewed Producers' (listing EASLEY, CORA; CHARRON, SUSIE; SHELBY, GROVER J; DEAN AND DAVIS INSURANCE AGENCY; SMITH, JAMES), 'Recent Subscriber Notices' (No notices), and 'PDB Updates Summary' (Producers with pending updates: 4; Producers with completed updates: Today: 0, Last 7 Days: , Last 30 Days:).

2. You will now see the *Data Reconciliation Requests* page.



The screenshot shows the 'Data Reconciliation Requests' page in the Siron application. The page title is 'Data Reconciliation Requests'. There are two main sections: 'Queued Requests' (with sub-sections 'All Requests', 'All Requests Needing Review', 'My Requests', and 'My Requests Needing Review') and 'All Requests' (with the text 'All completed reconciliation requests.'). Below these sections is a table with the following columns: Producer, Status, Reconciliation Action, Request Date, Status Date, Reviewed, and Actions.

Producer	Status	Reconciliation Action	Request Date	Status Date	Reviewed	Actions
CHIN, CHARLIE HEE (CA) Ext. ID: 1690 BU: PC	Processed	PDB Update	2023-07-01	2023-07-01	✓	
JOHNSON, VLADIMIR (MS)	Processed	Recalculation Update	2023-07-01	2023-07-01	✓	
DORMAND, SARAH (MI)	Processed	Recalculation Update	2023-07-01	2023-07-01	✓	
BARNARD, LOUIS (MI)	Processed	Recalculation Update	2023-07-01	2023-07-01	✓	
DORMAND, SARAH (MI)	Processed	Recalculation Update	2023-07-01	2023-07-01	✓	
JOHNSON, VLADIMIR (MS)	Processed	Recalculation Update	2023-06-30	2023-06-30	✓	
DORMAND, SARAH (MI)	Processed	Recalculation Update	2023-06-30	2023-06-30	✓	

Section: Review Data Reconciliation Requests

- There are several different filters available at the top of the page to help you sort through the data reconciliation requests.

Data Reconciliation Requests

Queued Requests

All Requests



All Requests Needing Review

My Requests

My Requests Needing Review

All Requests

All completed reconciliation requests.

Producer	Status	Reconciliation Action	Request Date	Status Date	Reviewed	Actions
 CHIN, CHARLIE HEE (CA) <small>Ext. ID: 1690 BU: PC</small>	Processed	PDB Update	2023-07-01	2023-07-01	✔	

All Requests

Use this filter to see all the requests, including requests that have been processed and requests that contain errors.

Data Reconciliation Requests

Queued Requests

All Requests











All Requests Needing Review

My Requests

My Requests Needing Review

All Requests

All completed reconciliation requests.

Producer	Status	Reconciliation Action	Request Date	Status Date	Reviewed	Actions
 CHIN, CHARLIE HEE (CA) <small>Ext. ID: 1690 BU: PC</small>	Processed	PDB Update	2023-07-01	2023-07-01	✔	
 JOHNSON, VLADIMIR (MS)	Processed	Recalculation Update	2023-07-01	2023-07-01	✔	
 DORMAND, SARAH (MI)	Processed	Recalculation Update	2023-07-01	2023-07-01	✔	
 BARNARD, LOUIS (MI)	Processed	Recalculation Update	2023-07-01	2023-07-01	✔	
 DORMAND, SARAH (MI)	Processed	Recalculation Update	2023-07-01	2023-07-01	✔	

Queued Requests

Use this filter to see requests that are currently processing or awaiting processing.

Data Reconciliation Requests

Queued Requests

All Requests

All Requests Needing Review













My Requests



My Requests Needing Review

Queued Requests

Reconciliation requests that are currently processing or awaiting processing.

Requests Awaiting Processing

#	Producer	Request Date	Reconciliation Action	Actions
1	 Norton, Jamie (VA)	2021-10-04 01:25:59 PM	Add Producer	 
2	 Blass, Bill (MS)	2022-05-17 01:13:38 PM	Add Producer	 
3	 Mable, Greg (MI)	2023-04-06 09:42:08 AM	Add Producer	 
4	 Cadmus <small>EIN: 00-0656000 Ext. ID: 633 BU: PC</small>	2021-08-31 11:26:58 AM	Producer Express Sync	 

Key:  = View Data Reconciliation Details  = Cancel Data Reconciliation

Section: Review Data Reconciliation Requests

All Requests Needing Review

Use this filter to see requests that have completed in the last 45 days with processing messages that require review.

Data Reconciliation Requests						
<p>Queued Requests</p> <p>All Requests</p> <p>All Requests Needing Review</p> <p>My Requests</p> <p>My Requests Needing Review</p>		<p>All Requests Needing Review</p> <p>All reconciliation requests that have completed in the last 45 days with processing messages needing review.</p>				
Producer	Status	Reconciliation Action	Request Date	Status Date	Reviewed	Actions
EASLEY, CORA (VA) Ext. ID: 1934 BU: DEFAULT	Processed	PDB Update	2023-06-14	2023-06-14		
STOM DEMO AGENCY (GA) EIN: 92-5133074 Ext. ID: 1960 BU: PC	Processed	Producer Express Sync	2023-06-14	2023-06-14		
STOM DEMO AGENCY (GA) EIN: 92-5133074 Ext. ID: 1960 BU: PC	Processed	PDB Update	2023-06-14	2023-06-14		
EASLEY, CORA (VA) Ext. ID: 1934 BU: DEFAULT	Processed	PDB Update	2023-06-13	2023-06-14		
DEAN AND DAVIS INSURANCE AGENCY (GA) EIN: 00-6233077 Ext. ID: 8253 BU: DEFAULT	Processed	PDB Update	2023-06-13	2023-06-13		
DEAN AND DAVIS INSURANCE AGENCY (GA) EIN: 00-6233077 Ext. ID: 8253 BU: DEFAULT	Processed	PDB Update	2023-06-13	2023-06-13		
CLARK, MELISSA J (VA) Ext. ID: 1863 BU: LIFE	Processed	Producer Express Sync	2023-06-07	2023-06-07		
STOM DEMO AGENCY EIN: 92-5133074	Processed	Producer Express Sync	2023-06-05	2023-06-05		
STOM DEMO AGENCY EIN: 92-5133074	Processed	PDB Update	2023-06-05	2023-06-05		

My Requests

Use this filter to see all the completed reconciliation requests you submitted.

Data Reconciliation Requests						
<p>Queued Requests</p> <p>All Requests</p> <p>All Requests Needing Review</p> <p>My Requests</p> <p>My Requests Needing Review</p>		<p>My Requests</p> <p>All completed reconciliation requests I've submitted.</p>				
Producer	Status	Reconciliation Action	Request Date	Status Date	Reviewed	Actions
EASLEY, CORA (VA) Ext. ID: 1934 BU: DEFAULT	Processed	Force Refresh Data	2023-06-13	2023-06-13		
Shelby	Processed	Add Producer	2023-05-18	2023-05-18		
EASLEY, CORA (VA) Ext. ID: 1934 BU: DEFAULT	Processed	Add Producer	2023-05-17	2023-05-17		
Dean and Davis Insurance Agency EIN: 00-6233077	Processed	Add Producer	2023-05-17	2023-05-17		
Cole	Processed	Add Producer	2023-03-29	2023-03-29		
<p>Key: = View Data Reconciliation Details</p> <p>5 reconciliation requests found, displaying all reconciliation requests.</p>						

Section: Review Data Reconciliation Requests

My Requests Needing Review

Use this filter to see all the reconciliation requests you submitted in the last 45 days that need reviewed.

Data Reconciliation Requests

Queued Requests

All Requests

All Requests Needing Review

My Requests

My Requests Needing Review

My Requests Needing Review


All reconciliation requests I've submitted that have completed in the last 45 days with processing messages needing review.

Producer	Status	Reconciliation Action	Request Date	Status Date	Reviewed	Actions
 EASLEY, CORA (VA) <small>Ext. ID: 1934 BU: DEFAULT</small>	Processed	Force Refresh Data	2023-06-13	2023-06-13		

Key:  = View Data Reconciliation Details

One reconciliation request found.

5. Within each filter, you will see the following fields:

- **Producer:** Lists the name of the producer and a hyperlink to the producer record (if available).
- **EIN:** *Firm producers only*. Displays a producer's Federal Employer Identification Number.
 - Click the **EIN** hyperlink to display the records associated with the EIN in the *Advanced Producer Search*.
- **BU:** Displays the short names of the business units, active or inactive, associated with the producer. Click the **Expand** button () to display all the producer's business units.
 - Click the **BU** hyperlink to view all the producers associated with that business unit in the *Advanced Producer Search* page.
- **Ext. ID:** Displays a producer's external system ID code.
 - Click an **Ext. ID** hyperlink to display all the producers associated with the selected external system ID in the *Advanced Producer Search* page.
- **Status:** The current status of the operation. The most common status of the data request is "Processed".
- **Reconciliation Action:** The system function that triggered the data reconciliation. For example: PDB Update, Producer Express Sync, Force Refresh Data, or Add Producer.
- **Request Date:** Displays the date on which the data reconciliation was initiated.
- **Status Date:** Displays the date on which the value of the **Status** field last was updated.
- **Reviewed:** Displays an icon that indicates whether the data reconciliation was reviewed.

Section: Review Data Reconciliation Requests

- Displays a **Review Incomplete** (⚠️) symbol if the request has processing messages that need reviewed.
- Displays a **Review Complete** (✅) symbol if all processing messages related to the request have been reviewed.
- **Action:** Offers the following controls:
 - Click the **View Reconciliation Data** button (🔍) to view the status of the reconciliation request and show an overview of errors both automatically resolved, and those in need of review. Data that came in from the PDB as well as updates made to the record can be viewed from hyperlinks on this page.

Data Reconciliation Requests

Queued Requests

All Requests

All Requests Needing Review

My Requests

My Requests Needing Review

All Requests

All completed reconciliation requests.

Producer	Status	Reconciliation Action	Request Date	Status Date	Reviewed	Actions
Cole	Processed	Add Producer	2023-06-08	2023-06-08	✅	🔍
CHIN, CHARLIE HEE (CA) Ext. ID: 1690 BU: PC	Processed	PDB Update	2023-06-08	2023-06-08	✅	🔍
CLARK, MELISSA J (VA) Ext. ID: 1863 BU: LIFE	Processed	Producer Express Sync	2023-06-07	2023-06-07	⚠️	🔍
COLE	Processed	PDB Update	2023-06-07	2023-06-07	✅	🔍
Cole	Processed	Add Producer	2023-06-07	2023-06-07	✅	🔍
YOUNG	Processed	Producer Express Sync	2023-06-07	2023-06-07	✅	🔍

Section: Review Data Reconciliation Requests

VIEW DATA RECONCILIATIONS WITH COMPLETED REVIEWS

In this section, we will view a data reconciliation request with the **Review Complete** (✅) indicator. You will follow these steps if you need to see a historical record of the data reconciliation.

1. Click the **View Reconciliation Data** button (🔍) to view the status of the reconciliation request and show an overview of errors both automatically resolved, and those in need of review. Data that came in from the PDB as well as updates made to the record can be viewed from hyperlinks on this page.

Data Reconciliation Requests

Queued Requests

All Requests

All Requests Needing Review

My Requests

My Requests Needing Review

My Requests

All completed reconciliation requests I've submitted.

Producer	Status	Reconciliation Action	Request Date	Status Date	Reviewed	Actions
Ext. ID: 1934 BU: DEFAULT	Processed	Force Refresh Data	2023-06-13	2023-06-13		
	Processed	Add Producer	2023-05-18	2023-05-18		
Ext. ID: 1934 BU: DEFAULT	Processed	Add Producer	2023-05-17	2023-05-17		
EIN: 00-6233077	Processed	Add Producer	2023-05-17	2023-05-17		
	Processed	Add Producer	2023-03-29	2023-03-29		

Key: = View Data Reconciliation Details

5 reconciliation requests found, displaying all reconciliation requests.

2. You will now see the *Data Reconciliation Details* page.

Data Reconciliation Details

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

Overview

Action: Add Producer

Requested By: Lauren Hall

Status: Processed

Status Date: 05-17-2023 4:26 PM

States: All States

Processing Messages to Review

Reviewed	State	Type	Processing Message
No Processing Messages			

Automatically Resolved Data Issues

Arizona

License Type : Insurance Producer **License Number :** 1000000005

License	Message
Insurance Producer	License expiration date prior to original issue date.
Qualification	Message
Variable Life/Variable Annuity	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.
Life	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.
Accident & Health or Sickness	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.

Reports:

[Producer Record Updates](#)

[PDB Data](#)

Section: Review Data Reconciliation Requests


3. This page lists all the data that was automatically updated during the data sync. There are four sections on this page:

- **Overview**
- **Reports**
- **Processing Messages to Review**
- **Automatically Resolved Data Issues**

4. In the **Overview** section, you will see the following fields:

- **Action:** Lists the operation that triggered the data reconciliation. For example, Add Producer or PDB Update.
- **Requested By:** Lists the team member that initiated the data reconciliation.
- **Status:** Lists the status of the request.
- **Status Date:** Lists the date and time the **Status** field was last updated.
- **States:** Lists all the states that contained producer updates.

Data Reconciliation Details


EASLEY, CORA Unrated

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

Overview

Action: Add Producer



Requested By: Lauren Hall

Status: Processed

Status Date: 05-17-2023 4:26 PM

States: All States

Reports:

-  [Producer Record Updates](#)
-  [PDB Data](#)

Processing Messages to Review

Reviewed	State	Type	Processing Message
No Processing Messages			

Automatically Resolved Data Issues

Arizona

License Type : Insurance Producer **License Number :** 1000000005

License	Message
Insurance Producer	License expiration date prior to original issue date.
Qualification	Message
Variable Life/Variable Annuity	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.
Life	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.
Accident & Health or Sickness	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.


5. In the **Reports** section, click the hyperlinks to see the source data used to reconcile the producer record. Some examples of reports you can see are:

- **Producer Records Updates:** Click to open the *Data Reconciliation Changes* page in a separate window. The report shows a side-by-side comparison of old and new values of data fields in the producer record that were affected by the synchronization.

Section: Review Data Reconciliation Requests

- **PDB Data:** Click to open the *External Data Source Report* page. Here you can view the data obtained from the national PDB that was used to update the producer record during the automated data reconciliation operation.
- **Education Report:** Click to open the *External Data Source Report* page. Here you can view the data obtained from a national repository of course completion information populated with data from "Sircon States" and the Vertafore Authorized Provider Network, an exclusive network of leading education providers.
 - Data includes state continuing education and product-specific training course completion information, including information not merged to the selected producer's record.
- **ClearCert Report:** Click to open the *External Data Source Report* page. Here you can view the results of the system's attempt to retrieve certification of the selected producer's fulfillment of long-term care training requirements from Compliance Certification Clearinghouse, LLC.

Data Reconciliation Details



 **EASLEY, CORA** Unrated

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

Overview

Action: Add Producer
Requested By: Lauren Hall
Status: Processed
Status Date: 05-17-2023 4:26 PM
States: All States


Reports:

-  [Producer Record Updates](#)
-  [PDB Data](#)

- At times, Producer Central encounters errors or issues when attempting to process an automated data reconciliation operation. Errors or issues that Producer Central cannot resolve automatically are displayed in the **Processing Messages to Review** section.

Note: We will discuss how to review and resolve data reconciliations with processing messages in the [Review and Resolve Reconciliations with Processing Errors](#) section of this quick guide.

Data Reconciliation Details



 **EASLEY, CORA** Unrated

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

Overview

Action: Add Producer
Requested By: Lauren Hall
Status: Processed
Status Date: 05-17-2023 4:26 PM
States: All States

Reports:

-  [Producer Record Updates](#)
-  [PDB Data](#)

Processing Messages to Review


Reviewed	State	Type	Processing Message
No Processing Messages			

Section: Review Data Reconciliation Requests

7. Producer Central can automatically normalize certain erroneous data retrieved from the data source as it is merged with existing producer data. Data normalizers (or "scrubbers") can automatically resolve license issue dates, LOA issue dates, status dates, and other data that, as reported by the external data source, are missing or are inconsistent. No user action is required.

The **Automatically Resolved Data Issues** section displays details about data that Producer Central has normalized. Information is grouped first by state and then by license type. Messages only display in this section if Producer Central automatically resolved an issue during the automated data reconciliation operation. Fields in this section include:

- **[StateName]:** Displays the name of the regulatory jurisdiction for which Producer Central normalized data.
- **License Type:** Displays the type of license issued by the regulatory jurisdiction the information about which was affected by data normalization.
- **License Number:** Displays the state-assigned number of the license issued by the regulatory jurisdiction.
- **[InformationType]:** Displays the data section on the producer's record that was affected by the data normalization (e.g., Qualification, Appointment, etc.)
- **Message:** Describes the action performed by the data normalization.


EASLEY, CORA Unrated

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
	[+] DEFAULT	1000000028	VA / 736178	[+] AZ / 1000000005

Overview

Action: Add Producer

Requested By: Lauren Hall

Status: Processed

Status Date: 05-17-2023 4:26 PM

States: All States

Reports:

- [+] Producer Record Updates
- [+] PDB Data

Processing Messages to Review

Reviewed	State	Type	Processing Message
No Processing Messages			

Automatically Resolved Data Issues

Arizona

License Type : Insurance Producer **License Number :** 1000000005

License	Message
Insurance Producer	License expiration date prior to original issue date.
Qualification	Message
Variable Life/Variable Annuity	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.
Life	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.
Accident & Health or Sickness	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.

Note: Refer to the [Automatically Resolved Data Issues](#) section of the quick guide to see a full list of the messages and a description of the data scrubbers used by Producer Central to reconcile data.

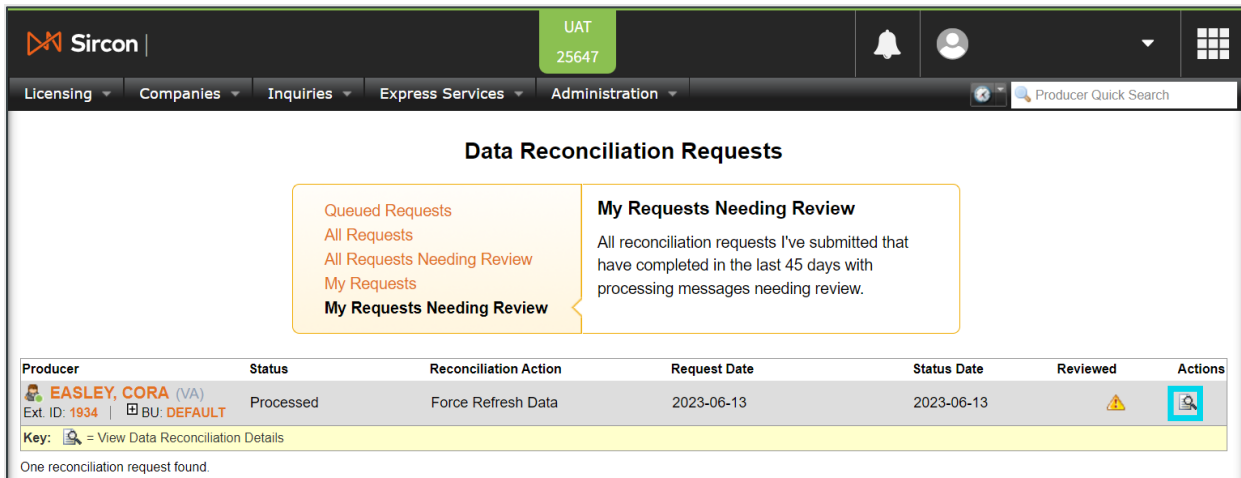
Section: Review Data Reconciliation Requests

REVIEW AND RESOLVE RECONCILIATIONS WITH PROCESSING ERRORS

In this section, we will learn how to review and resolve data reconciliation requests with processing errors. These requests have the **Review Incomplete** (⚠️) indicator.

1. Click the **View Reconciliation Data** button (🔍) to open a report that shows all the data that was last synced with the report.

Note: In this example, we are using the **My Requests Needing Review** filter to isolate the requests in our queue.



Producer	Status	Reconciliation Action	Request Date	Status Date	Reviewed	Actions
EASLEY, CORA (VA) Ext. ID: 1934 BU: DEFAULT	Processed	Force Refresh Data	2023-06-13	2023-06-13	⚠️	


Key: 🔍 = View Data Reconciliation Details

One reconciliation request found.

2. Scroll to the **Processing Messages to Review** section. You will see the following fields:
 - **Reviewed:** Displays whether the message has been reviewed.
 - **State:** Displays the name of the regulatory jurisdiction which received an error during an automated data reconciliation request.
 - **Type:** Displays the type of error or issue that Producer Central encountered when processing an automated data reconciliation request.
 - **Processing Message:** Detailed information about the error or issue that Producer Central encountered when processing an automated data reconciliation request.
 - **Export Options:** Click a link to export the displayed results to one of the following file formats:
 - CSV (Comma-Separated Values)
 - Excel (Microsoft Excel)
 - XML
 - PDF (Adobe PDF)

Section: Review Data Reconciliation Requests

Data Reconciliation Details


EASLEY, CORA Unrated

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

Overview

Action: Force Refresh Data
Requested By: Lauren Hall
Status: Processed
Status Date: 06-13-2023 1:23 PM
States: All States

Reports:
[Producer Record Updates](#)
[PDB Data](#)

Processing Messages to Review

Review Status: ⚠ 1 Unreviewed

Review All / Reset All

Reviewed	State	Type	Processing Message
⚠ Mark as Reviewed	Delaware		License: Original Issue Date must be on or before Effective Date for the Insurance Producer license in Delaware. This external record will be ignored when merging.

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


- Review the **Processing Message**. Depending on the error, you will need to follow different steps to resolve the issue.

Note: Refer to the [Processing Messages to Review](#) section for a list of the most common errors and their resolution steps.

- After you review and resolve the issue, click the **Mark as Reviewed** button to mark a selected processing message as reviewed.

Note: If you have multiple processing messages, you can click **Review All** to review all the messages at one time. You can also click **Reset All** to reset all the reviewed messages.

Data Reconciliation Details


EASLEY, CORA Unrated

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

Overview

Action: Force Refresh Data
Requested By: Lauren Hall
Status: Processed
Status Date: 06-13-2023 1:23 PM
States: All States

Reports:
[Producer Record Updates](#)
[PDB Data](#)

Processing Messages to Review

Review Status: ⚠ 1 Unreviewed

Review All / Reset All

Reviewed	State	Type	Processing Message
⚠ Mark as Reviewed	Delaware		License: Original Issue Date must be on or before Effective Date for the Insurance Producer license in Delaware. This external record will be ignored when merging.


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

Section: Review Data Reconciliation Requests

- The reviewed column will now show your name and will display the **Review Complete** (✔) icon.

Note: Click **Reset** if you need to remove the **Review Complete** (✔) status and return to the **Review Incomplete** (⚠) status.

Data Reconciliation Details


EASLEY, CORA Unrated

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

Overview

Action: Force Refresh Data
Requested By: Lauren Hall
Status: Processed
Status Date: 06-13-2023 1:23 PM
States: All States

Processing Messages to Review


Review Status: ✔ All Reviewed


Review All / Reset All

Reviewed	State	Type	Processing Message
✔ Lauren Hall Reset	Delaware		License: Original Issue Date must be on or before Effective Date for the Insurance Producer license in Delaware. This external record will be ignored when merging.

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

Reports:

 [Producer Record Updates](#)

 [PDB Data](#)


Automatically Resolved Data Messages

Producer Central uses a series of data normalizers (or data scrubbers) to automatically correct data inconsistencies found during reconciliations with the PDB. External data sources can contain missing or inconsistent license issue dates, LOA issue dates, status dates, or other data anomalies. For those reasons, data that Producer Central obtains from the PDB often conflicts with internal data models that require data to relate in a valid way.

Normalizers manipulate the data from the PDB in a consistent and reproducible way before the data is merged to producer records in Producer Central. All changes are audited and documented, so that if Vertafore customers are subject to market conduct exams, customers can easily show proof they were following a set of rules that makes sense – even if the state data used to reconcile customer data was incomplete or illogical.

Data normalization occurs automatically and requires no extra effort on the part of the user. Changes made to each record are noted and stored in affected producer records for future reference and audit-logging. This information is contained in the **Automatically Resolved Data Issues** section of the *Data Reconciliation Details* page.

Data Reconciliation Details




EASLEY, CORA Unrated

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

Overview

Action: Add Producer
Requested By: Lauren Hall
Status: Processed
Status Date: 05-17-2023 4:26 PM
States: All States

Reports:

-  [Producer Record Updates](#)
-  [PDB Data](#)

Processing Messages to Review

Reviewed	State	Type	Processing Message
No Processing Messages			

Automatically Resolved Data Issues

Arizona

License Type : Insurance Producer **License Number :** 1000000005

License	Message
Insurance Producer	License expiration date prior to original issue date.
Qualification	Message
Variable Life/Variable Annuity	PDB Qualification expiration date is missing or is after its related PDB Licenses expiration date.

In this section, we will explore the common messages you will encounter in the **Automatically Resolved Data Issues** section of the *Data Reconciliation Details* page. We will explain the meaning of each message and explain the system action that took place to normalize the data. Use the [Table of Contents](#) to quickly jump to any message you need to see.

Section: Automatically Resolved Data Messages

Normalizers are grouped by data type. Each normalizer includes the following information:

- **Message:** The audit message seen in the **Automatically Resolved Data Issues** Section of the *Data Reconciliation Details* page.
- **Data Inconsistency Description:** A description of the data inconsistency encountered during automated data reconciliation that triggered use of the data normalizer.
- **System Action:** A description of the specific action that the system took to normalize anomalous data.
- **Data Normalizer:** The specific name of the data normalizer used in the background of Producer Central.

General Issues

[NO MESSAGE]

If no message is listed, there are two reasons automated reconciliations could have taken place:

1. An inactive license on the PDB report may be of a type that the state no longer supports and has made historical.
2. Producer Central requires license information on a producer record to include valid values in the **Original Issue Date** and **Effective Date** fields. However, license information obtained from the PDB only includes an Issue Date.

Inactive License Type No Longer Supported

For the affected producer, the external data source report contains information about active and inactive state licenses of the same type. An inactive license on the report may be of a type that the state no longer supports and has made historical.

System Action

The system updates the affected producer in Producer Central as follows:

- If the external data source report contains active and inactive state licenses of both active and historical license types, the system updates the record with license information of only active license types and their related qualifications (LOA). Licenses of historical license types and related qualifications are ignored.
- If the external data source report contains only inactive licenses of historical license types, the system updates the record with the inactive license with the most recent **Issue Date** and its related qualifications.

Data Normalizer – OrderLicensesByStatusScrubber

Only Issue Date Included in PDB

Producer Central requires license information on a producer record to include valid values in the **Original Issue Date** and **Effective Date** fields.

However, license information obtained from the external data source includes only an **Issue Date**.

System Action

The system updates the affected producer record in Producer Central as follows:

- For a license on the external data source report with a **Status of Active**, the system updates the license **Original Issue Date** and **Effective Date** fields on the producer record with the value of the license **Issue Date** on the external data source report.
- For a license on the external data source report with a **Status of Inactive**, the system updates the license **Original Issue Date** on the producer record with the value of the license **Issue Date** on the external data source report. It updates the **Effective Date** on the producer record with a value from the external data source report of either the license **Expiration Date** or the most-recent **Status/Reason Date** of any related LOA, whichever is older.

Note: For an inactive license, if data does not exist for the normalizer to work, the system updates the license **Effective Date** on the producer record with the license **Issue Date** on the external data source report and generates a **Processing Message to Review**.

Data Normalizer – N/A

License Data Issues

EXISTING PRODUCER CENTRAL LICENSE DATES IN CONFLICT WITH PDB LICENSE DATES.

When renewing a license, some states will occasionally update the license issue date with the date of renewal.

When this occurs, license information obtained from the PDB may include a state license for which the **Issue Date** is more than 30 days after the **Original Issue Date** of the same license on the affected producer's record in Producer Central.

System Action

Producer Central seeks to preserve the **Original Issue Date** of an active license on producer records, because an updated date could conflict with related qualification (LOA) and/or appointment dates.

The system first verifies that the status of the license is identical on both the affected producer's record and the external data source report.

If the status is identical, and the value of the **Original Issue Date** of the license on the producer's record is more than 30 days prior to the **Issue Date** on the external data source report, then the **Issue Date** is ignored and no update to **Original Issue Date** occurs.

Data Normalizer – ProtectPmDatesProducerScrubber

EXISTING PRODUCER CENTRAL LICENSE EXPIRATION DATE DETERMINED TO BE DELIBERATELY SET FAR IN THE FUTURE.

License information obtained from the external data source includes a state license with a null **Expiration Date**.

To conform to the data requirements of other systems downstream from the Sircon platform, some customers manually enter on producer records a license and related qualification **Expiration Date** far into the future (e.g., 01-01-2099).

Note: License information with a null **Expiration Date** obtained from the external data source typically originates from a state that issues "perpetual" licenses (i.e., a license without a fixed period of effectiveness).

System Action

The system updates the affected producer's record in Producer Central using the following logic:

- If the Vertafore-configurable business rule **dr.protectLicenseExpDte** is set to "Y," and the value of the license **Expiration Date** on the producer's record is more than 10 years after the date of the automated data reconciliation, then the license **Expiration Date** on the producer record is preserved.
- If the Vertafore-configurable business rule **dr.protectLicenseExpDte** is set to "Y," and the value of the license **Expiration Date** on the producer's record is less than 10 years after the date of the automated data reconciliation, then the system updates the license **Expiration Date** on producer record with the null value of the **Expiration Date** on the external data source report.
- If the Vertafore-configurable business rule **dr.protectLicenseExpDte** is not set or set to "N," then the system updates the license **Expiration Date** on producer

Section: Automatically Resolved Data Messages

record with the null value of the **Expiration Date** on the external data source report.

Data Normalizer – ProtectPmDatesProducerScrubber

Note: This normalizer was developed before other normalizers that handle null **Expiration Dates** more logically, based on Vertafore's interpretation of state regulations.

FUTURED DATED LICENSE

License information obtained from the external data source includes a state license for which the value of the **Issue Date** is in the future.

System Action

For a license on the PDB report with a **Status** of **Active**, the system updates the affected producer's record using the following logic:

- If, on the external data source report, the **Authority Issue Date** of at least one related LOA is in the past, the system updates the license **Original Issue Date** and **Effective Date** fields on the producer's record with the value of the oldest **LOA Authority Issue Date**.
- If, on the external data source report, the **Authority Issue Date** of all related LOA is in the future, but the **Status/Reason Date** of at least one related LOA is in the past, the system updates the license **Original Issue Date** and **Effective Date** fields on the producer's record with the value of the oldest **LOA Status/Reason Date**.
- If, on the external data source report, the **Authority Issue Date** and **Status/Reason Date** of related are in the future, the system updates the license **Original Issue Date** and **Effective Date** fields on the producer's record with the date of the automated data reconciliation.

For a license on the external data source report with a **Status** of **Inactive**, the system updates the affected producer's record using the following logic:

- If, on the external data source report, the **Authority Issue Date** of at least one related LOA is in the past, the system updates the license **Original Issue Date** field on the producer's record with the value of the oldest **LOA Authority Issue Date** and the license **Effective Date** field on the producer's record with the date of the automated data reconciliation.
- If, on the external data source report, the **Authority Issue Date** of all related LOA is in the future, but the **Status/Reason Date** of at least one related LOA is in the past, the system updates the license **Original Issue Date** and **Effective Date** fields on the producer's record with the value of the oldest **LOA Status/Reason Date**.
- If, on the external data source report, the **Authority Issue Date** and **Status/Reason Date** of all related LOA are in the future, the system updates the license **Original Issue Date** and **Effective Date** fields on the producer's record with the date of the automated data reconciliation.

Data Normalizer – ProtectPmDatesProducerScrubber

Section: Automatically Resolved Data Messages

INACTIVE LICENSE WITHOUT SUPPORTING LOAS

License and qualification (LOA) information obtained from the external data source includes an inactive license for which code use indicators are enabled in your company's Sircon platform.

However, the external data source report also includes inactive qualifications that are related to the inactive license and for which code use indicators are not enabled in your company's Sircon platform environment.

Note: For more information about code use indicators, refer to the [Administration in Producer Central Quick Guide](#).

System Action

The system does not add the inactive license to an affected producer's record. If the license already exists on the producer's record, the system removes it.

Data Normalizer – InactiveUnsupportedLicensesAndApptsProducerScrubber

LICENSE EXPIRATION DATE PRIOR TO ORIGINAL ISSUE DATE

License information obtained from the external data source includes a state license for which the **Expiration Date** precedes the **Issue Date**.

System Action

The system updates the value of the license **Expiration Date** field to be identical to that of the **Original Issue Date** field on the affected producer's record.

Data Normalizer – N/A

LICENSE INACTIVATED BECAUSE SUPPORTED BY UNTRACKED QUALIFICATION(S)

License and qualification (LOA) information obtained from the external data source includes an active license but no active qualifications for which code use indicators are enabled in your company's Sircon platform.

The external data source report may include one or more active qualifications supported by the active license, but for which code use indicators are not enabled in your company's Sircon platform.

Note: For more information about code use indicators, refer to the [Administration in Producer Central Quick Guide](#).

System Action

The system checks the LOA information on the external data source report against the qualifications for which code use indicators are enabled in Producer Central.

If the system finds inactive LOA on the external data source report for which code use indicators are enabled, as well as active LOA for which code use indicators are not enabled, the system does the following:

- If the supporting license exists on the affected producer record in Producer Central, the system inactivates the license and inserts an **Inactivation Reason** of "Supporting Qualifications are Ignored." The system inserts the value of the **Original Issue Date** as values in the **Effective Date** and **Expiration Date** fields.
- If the supporting license does not exist on the affected producer record in Producer Central, the system adds the license and qualification(s) with a **Status** of **Inactive** and inserts an **Inactivation Reason** of "Supporting Qualifications are Ignored." The system inserts the value of the **Original Issue Date** as values in the **Effective Date** and **Expiration Date** fields.

Note: The system by default uses the **Merge Active** data merge strategy when adding a producer record using **Quick Add Producer** or **Quick Load Producers**. However, under this scenario, because a license technically is active on the external data source, the system makes an exception to the merge strategy and adds the inactive license when the termination reason is "Supporting Qualifications are Ignored."

Note: The normalizer also works in reverse. Inactive license and qualifications on an affected producer record will be updated to active, if on the external data source, the license is active and active qualifications exist for which code use indicators are enabled.

Note: If the external data source report includes an active license, inactive qualification(s) for which code use indicators are enabled, and no or inactive qualifications for which code use indicators are not enabled, no information will be merged to the affected producer's record, and the following processing message will be logged: "License: [License Type] license for [State] does not have the necessary supporting qualification(s)."

Data Normalizer – InactiveLicensesSupportedByIgnoredLoasScrubber

Section: Automatically Resolved Data Messages

MISSING LICENSE ORIGINAL ISSUE DATE

License information obtained from the external data source includes a state license for which the **Issue Date** does not exist.

System Action

The system updates the affected producer record in Producer Central using the following logic:

- If the license on the external data source report has a **Status** of **Active**, the system updates the **Original Issue Date** field of the license on the producer's record with the value of the oldest **Authority Issue Date** on the external data source report of any active LOA supported by the license.
- If the license on the external data source report has a **Status** of **Inactive**, the system updates the **Original Issue Date** field of the license on the producer's record with the value of the oldest **Authority Issue Date** on the external data source report of any inactive LOA supported by the license.

Data Normalizer – N/A

NO LICENSE EXPIRATION DATE ON PDB. EXPIRATION DATE DERIVED FROM CE REQUIREMENTS, FEE DUE DATES, OR KNOWN RENEWAL POLICIES.

License information obtained from the external data source for an individual producer includes an active resident or non-resident state license with a null **Expiration Date**.

Note: License information with a null **Expiration Date** obtained from the external data source typically originates from a state that issues “perpetual” licenses (i.e., a license without a fixed period of effectiveness).

System Action

Vertafore's interpretation of the license state's regulations allows derivation of an **Expiration Date** from the producer's resident state's continuing education (CE) renewal requirements, which themselves are calculated based on license issuance anniversary date or producer birth date information.

Data Normalizer – PerpetualLicenseExpirationDatePopulatorProducerScrubber

Section: Automatically Resolved Data Messages

NO LICENSE EXPIRATION DATE ON PDB (PERPETUAL LICENSE STATE).
EXPIRATION DATE DERIVED FROM LOA CE RENEWAL DATES.

License information obtained from the external data source for an individual producer includes an active resident state license with a null **Expiration Date**.

Note: License information with a null **Expiration Date** obtained from the external data source typically originates from a state that issues “perpetual” licenses (i.e., a license without a fixed period of effectiveness).

System Action

The system updates the license **Expiration Date** on the affected producer's record in Producer Central with the latest **CE Renewal Date** on the external data source report.

Data Normalizer – N/A

NO LICENSE EXPIRATION DATE ON PDB (PERPETUAL LICENSE STATE).
EXPIRATION DATE DERIVED FROM THE LATEST RESIDENT LICENSE EXPIRATION DATE.

License information obtained from the external data source for an individual producer includes an active non-resident state license with a null **Expiration Date**.

Vertafore's interpretation of the non- resident license state's regulations allows derivation of an **Expiration Date** from resident state license information.

Note: License information with a null **Expiration Date** obtained from the external data source typically originates from a state that issues “perpetual” licenses (i.e., a license without a fixed period of effectiveness).

System Action

The system updates the affected producer's record in Producer Central using the following logic:

- If the external data report contains information about a single active license in a single resident state, the system updates the non- resident license **Expiration Date** with the **Expiration Date** of the producer's resident license.
- If the external data report contains information about multiple active licenses in one or multiple resident states, the system updates the non-resident license **Expiration Date** with the **Expiration Date** of the resident license that is furthest into the future.

Data Normalizer – PerpetualLicenseExpirationDatePopulatorProducerScrubber

Section: Automatically Resolved Data Messages

NO LICENSE EXPIRATION DATE ON PDB (PERPETUAL LICENSE STATE). UNABLE TO DERIVE AN EXPIRATION DATE FROM A RESIDENT LICENSE EXPIRATION DATE BECAUSE NONE WERE AVAILABLE ON THE PDB REPORT. PLEASE MANUALLY DERIVE THE EXPIRATION DATE.

License information obtained from the external data source for an individual producer includes an active non-resident state license with a null **Expiration Date**.

The external data source report did not contain resident state license information.

Note: License information with a null **Expiration Date** obtained from the external data source typically originates from a state that issues “perpetual” licenses (i.e., a license without a fixed period of effectiveness).

System Action

The system adds or updates the active non-resident license information to the producer’s record in Producer Central, but with a null value in the **Effective Date** field.

It may be necessary to add a value to the non-resident license **Effective Date** field manually.

Note: If the **create.messages.for.missing.lic.expr.date** business rule is enabled, after processing an automated data reconciliation operation the system will generate a **Processing Message to Review** if an active license on a producer record has a non-populated **Expiration Date** field.

Data Normalizer – N/A

UPDATE DERIVED LICENSE EXPIRATION DATES EVEN IF NO CHANGE OCCURRED ON THE PDB REPORT

Note: If the status date of the license is after the expiration date the system will recalculate license **Expiration Dates**, for states that do not report **Expiration Dates**, regardless if there is new information on the PDB.

Section: Automatically Resolved Data Messages

THE [LICENSE TYPE] IN [STATE] BECAME HISTORICAL ON [EFFECTIVE DATE].

The external data source report contains information regarding a license type that the issuing state stopped supporting on a given date.

The affected producer's record in Producer Central contains a license of the now-historical type.

System Action

For the stated license, the system updates the affected producer's record as follows:

- Updates the value of the **Status** field with **Inactive**
- Updates the value of the **Effective Date** field with the date on which the state made the license type historical
- Updates the value of the **Inactivation Reason** field with **Canceled**

Data Normalizer – N/A

Section: Automatically Resolved Data Messages

Qualification (LOA) Data Issues

ACTIVE PDB QUALIFICATION STATUS DATE IS DIFFERENT THAN ITS ORIGINAL ISSUE DATE.

License information obtained from the external data source includes a state license qualification (LOA) for which the **Status/Reason Date** is later than the **Authority Issue Date**.

System Action

If the LOA on the external data source report has a **Status** of **Active**, the system updates the values of the qualification **Original Issue Date** and **Effective Date** fields on the affected producer record in Producer Central with the value of the **Authority Issue Date** field on the external data source report.

Data Normalizer – N/A

EXISTING PRODUCER CENTRAL LOA/QUALIFICATION ORIGINAL ISSUE DATE IN CONFLICT WITH PDB LOA/QUALIFICATION ORIGINAL ISSUE DATE.

This message may appear in one of two ways:

1. Existing Producer Central LOA original issue date in conflict with PDB LOA original issue date.
2. Existing Producer Central Qualification original issue date in conflict with PDB Qualification original issue date.

When renewing a license, some states will occasionally update the issue date of a related line of authority (LOA) with the date of license renewal.

When this occurs, license information obtained from the external data source may include a LOA related to a state license for which the **Authority Issue Date** is more than 30 days after the **Original Issue Date** of the same qualification (LOA) on the affected producer's record in Producer Central.

System Action

Producer Central seeks to preserve the **Original Issue Date** of an active qualification (LOA) on producer records, because an updated date could conflict with related license and/or appointment dates.

The system first verifies that the status of the qualification (LOA) is identical on both the affected producer record in Producer Central and the external data source report.

Section: Automatically Resolved Data Messages

If status is identical, and the value of the **Original Issue Date** of the qualification on the producer record is 30 days or older than the **LOA Authority Issue Date** on the external data source report, then the **Authority Issue Date** is ignored and no update to **Original Issue Date** occurs.

However, the system will update a qualification's **Original Issue Date** with the value of the **Authority Issue Date** from the external data source report under the following conditions:

- If the **Status** of the qualification (LOA) is **Active**, and its **Original Issue Date** would make it unsupported by the **Original Issue Date** of its active, related license
- If the qualification is a “Variable” type that is usually issued after its related license (e.g., Variable Lines, Variable Annuity, Variable Contracts, etc.)
- If the **Status** of the qualification is **Inactive**, and the values of its **Original Issue Date** and **Effective Date** are identical.

Data Normalizer – N/A

EXISTING PRODUCER CENTRAL LOA/QUALIFICATION STATUS DATE IN CONFLICT WITH PDB LOA/QUALIFICATION STATUS DATE.

This message may appear in one of two ways:

1. Existing Producer Central LOA status date in conflict with PDB LOA status date.
2. Existing Producer Central Qualification status date in conflict with PDB Qualification status date.

When renewing a license, some states occasionally will update the status date of related line of authority (LOA) with the date of license renewal.

When this occurs, license information obtained from the external data source may include a LOA related to a state license for which the **Status/Reason Date** is more than 30 days after the **Effective Date** of the same qualification (LOA) on the affected producer's record in Producer Central.

System Action

Producer Central seeks to preserve the **Effective Date** of an active qualification (LOA) on producer records, because an updated date could conflict with related license and/or appointment dates.

The system first verifies that the status of the qualification (LOA) is identical on both the affected producer's record and the external data source report.

If status is identical, and the value of the **Effective Date** of the qualification on the producer's record is 30 days or older than the **LOA Status/Reason Date** on the external

Section: Automatically Resolved Data Messages

data source report, then the **Status/Reason Date** is ignored and no update to **Effective Date** occurs.

However, the system will update a qualification's **Effective Date** with the value of the **Status/Reason Date** from the external data source report under the following conditions:

- If the **Status** of the qualification (LOA) is **Active**, and its **Effective Date** would make it unsupported by the **Effective Date** of its **Active**, related license
- If the qualification is a "Variable" type that is usually issued after its related license (e.g., Variable Lines, Variable Annuity, Variable Contracts, etc.)
- If the **Status** of the qualification is Inactive, and the values of its **Original Issue Date** and **Effective Date** are identical.

Data Normalizer – N/A

EXISTING PRODUCER CENTRAL QUALIFICATION EXPIRATION DATE DETERMINED TO BE DELIBERATELY SET TO A FALSIFIED DATE.

Note: This normalizer was developed before other normalizers that handle null **Expiration Dates** more logically, based on Vertafore's interpretation of state regulations.

License information obtained from the external data source includes a state license qualification (LOA) with a null **Expiration Date**.

To conform to the data requirements of other systems downstream from the Siron platform, some customers manually enter on producer records a qualification **Expiration Date** far into the future (e.g., 01-01-2099).

Note: License qualification information with a null **Expiration Date** obtained from the external data source typically originates from a state that issues "perpetual" licenses (i.e., a license without a fixed period of effectiveness).

System Action

The system updates the affected producer record in Producer Central using the following logic:

- If the Vertafore-configurable business rule **dr.protectLicenseExpDte** is set to "Y," and the value of the license **Expiration Date** on the producer's record is more than 10 years after the date of the automated data reconciliation, then qualification **Expiration Dates** on the producer record are preserved.
- If the Vertafore-configurable business rule **dr.protectLicenseExpDte** is set to "Y," and the value of the license **Expiration Date** on the producer's record is less than

Section: Automatically Resolved Data Messages

10 years after the date of the automated data reconciliation, then the system updates the qualification **Expiration Dates** on producer record with the null value of the **Expiration Date** on the external data source report.

- If the Vertafore-configurable business rule **dr.protectLicenseExpDte** is not set or set to "N," then the system updates the qualification **Expiration Dates** on producer record with the null value of the **Expiration Date** on the external data source report.

Note: This normalizer was developed before other normalizers that handle null **Expiration Dates** more logically, based on Vertafore's interpretation of state regulations.

Data Normalizer – N/A

FUTURE DATE QUALIFICATION

License information obtained from the external data source includes a state license qualification (LOA) for which the value of the **Authority Issue Date** or **Status/Reason Date** is in the future.

System Action

For an LOA on the external data source report with a **Status** of **Active**, the system updates the affected producer record in Producer Central using the following logic:

- If the **Authority Issue Date** and **Status/Reason Date** on the external data source report both are in the future, the system updates the qualification **Original Issue Date** and **Effective Date** fields on the producer's record with the date of the automated data reconciliation.
- If, on the external data source report, the **Authority Issue Date** is in the future, but the **Status/Reason Date** is in the past, the system updates the qualification **Original Issue Date** and **Effective Date** fields on the producer's record with the value of the **Status/Reason Date**.
- If, on the external data source report, the **Authority Issue Date** is in the past, but the **Status/Reason Date** is in the future, the system updates the qualification **Original Issue Date** and **Effective Date** fields on the producer's record with the value of the **Authority Issue Date**.

For an LOA on the external data source report with a **Status** of **Inactive**, the system updates the affected producer record in Producer Central using the following logic:

- If, on the external data source report, the **Authority Issue Date** and **Status/Reason Date** both are in the future, the system updates the qualification **Original Issue Date** and **Effective Date** fields on the producer's record with the date of the automated data reconciliation.
- If, on the external data source report, the **Authority Issue Date** is in the future, but the **Status/Reason Date** is in the past, the system updates the qualification

Section: Automatically Resolved Data Messages

Original Issue Date and **Effective Date** fields on the producer's record with the value of the **Status/Reason Date**.

- If, on the external data source report, the **Authority Issue Date** is in the past, but the **Status/Reason Date** is in the future, the system updates the qualification **Original Issue Date** field on the producer's record with the value of the **Authority Issue Date** and the qualification **Effective Date** field on the producer's record with the date of the automated data reconciliation.

Data Normalizer – N/A

INACTIVE PDB LOA EXPIRATION DATE PRIOR TO ITS STATUS DATE.

License information obtained from the external data source includes an inactive, related state license qualification (LOA) for which the **Status/Reason Date** is later than **Expiration Date**.

System Action

The system updates the qualification (LOA) **Effective Date** on the affected producer record in Producer Central with the value of the **Expiration Date** on the external data source report.

Then, if **LOA Effective Date** on the affected producer record precedes the **LOA Original Issue Date**, the system updates the **Original Issue Date** with the value of the **Effective Date**.

Data Normalizer – N/A

MISSING BOTH QUALIFICATION ORIGINAL ISSUE DATE AND STATUS DATE. OR
MISSING BOTH LOA ORIGINAL ISSUE DATE AND STATUS DATE.

License information obtained from the external data source includes a state license qualification (LOA) for which the **Authority Issue Date** and **Status/Reason Date** do not exist.

System Action

The system updates the affected producer record in Producer Central using the following logic:

- If the LOA on the external data source report has a **Status** of **Active**, the system updates the **Original Issue Date** and **Effective Date** fields of the qualification on the producer's record with the value of the oldest **Status/Reason Date** on the external data source report of any active appointment supported by the qualification.

Section: Automatically Resolved Data Messages

- If the LOA on the external data source report has a **Status** of **Inactive**, the system updates the **Original Issue Date** and **Effective Date** fields of the qualification on the producer's record with the value of the most recent **Status/Reason Date** on the external data source report of any terminated appointment supported by the qualification.
- If the system cannot derive a date based on the preceding, the system updates the **Original Issue Date** and **Effective Date** fields of the qualification on the producer's record with the value of the **Issue Date** of the related active or inactive license.

Data Normalizer – N/A

MISSING QUALIFICATION ORIGINAL ISSUE DATE. OR MISSING LOA ORIGINAL ISSUE DATE.

License information obtained from the external data source includes a state license qualification (LOA) for which the **Authority Issue Date** does not exist.

System Action

The system updates the value of the qualification **Original Issue Date** field on the affected producer record in Producer Central with the value of the **Status/Reason Date** on the external data source report.

Data Normalizer – N/A

MISSING QUALIFICATION STATUS DATE. OR MISSING LOA STATUS DATE.

License information obtained from the external data source includes a state license qualification (LOA) for which the **Status/Reason Date** does not exist.

System Action

The system updates the value of the qualification **Effective Date** field on the affected producer record in Producer Central with the value of the **Issue Date** on the external data source report.

Data Normalizer – N/A

Section: Automatically Resolved Data Messages

PDB QUALIFICATION DATES PRIOR TO PDB LICENSE ORIGINAL ISSUE DATE.

License information obtained from the external data source includes a state license qualification (LOA) for which the **Authority Issue Date** precedes the **Issue Date** of its related license.

System Action

- For a license on the external data source report with a **Status of Active**, the system updates the **Original Issue Date** of the license on the affected producer record in Producer Central with the oldest **Authority Issue Date** of any related, active qualification on the external data source report.
- For a license on the external data source report with a **Status of Inactive**, the system updates the **Original Issue Date** of the license on the affected producer record in Producer Central with the oldest **Authority Issue Date** of any related, inactive qualification on the external data source report.

Data Normalizer – N/A

PDB QUALIFICATION EXPIRATION DATE IS MISSING OR IS AFTER ITS RELATED PDB LICENSE'S EXPIRATION DATE.

License information obtained from the external data source includes a related state license qualification (LOA) for which the **Expiration Date** does not exist or is later than the license **Expiration Date**.

System Action

The system updates the qualification (**LOA**) **Expiration Date** on the affected producer record in Producer Central with the value of the latest **Expiration Date** of any supporting license on the external data source report.

Data Normalizer – N/A

PDB QUALIFICATION STATUS DATE PRIOR TO PDB QUALIFICATION ORIGINAL ISSUE DATE.

License information obtained from the external data source includes a state license qualification (LOA) for which the **Status/Reason Date** precedes the **Authority Issue Date**.

System Action

The system updates the values of the qualification **Original Issue Date** and **Effective Date** fields on the affected producer's record in Producer Central with the value of the **Status/Reason Date** field on the external data source report.

Data Normalizer – N/A

Section: Automatically Resolved Data Messages

THE [QUALIFICATION] [QUALIFICATION] IN [STATE] BECAME HISTORICAL ON [EFFECTIVE DATE].

The external data source report contains information regarding a qualification (LOA that the issuing state stopped supporting on a given date.

The affected producer's record in Producer Central contains a qualification of the now-historical type.

System Action

For the stated qualification, the system updates the affected producer record in Producer Central as follows:

- Updates the value of the **Status** field with **Inactive**.
- Updates the value of the **Effective Date** field with the date on which the state made the qualification historical.
- Updates the value of the **Inactivation Reason** field with **Canceled**.

Data Normalizer – N/A

Appointment Data Issues

[APPOINTMENT TYPE] APPOINTMENT DATES ARE UNRELIABLE.

Information obtained from the external data source for an active South Carolina individual appointment appropriately includes the specific appointment type, expressed as values in the **Line of Authority** and **LOA Code** fields.

However, the external data source report does not include specific appointment type information for a terminated South Carolina appointment. Instead – initially – it includes a value of None in the **Line of Authority** field and a value of 101 in the **LOA Code** field.

This leaves a terminated appointment without a record relationship to its supporting license and LOA. Therefore, automated data reconciliation could potentially overwrite a valid value in the **Term Date** field for a terminated appointment on an affected producer's record in Producer Central.

Note: Eventually a terminated South Carolina appointment disappears altogether on the external data source.

System Action

The **Line of Authority** value of **None** and the **LOA Code** value of 101 on the external data source report are mapped to all Sircon platform-supported individual appointment types in South Carolina.

When processing automated data reconciliation, the system compares the **Status/Reason Date** on the external data source report of a terminated South Carolina appointment by a specific appointing company with the **Term Date** (if any) of an appointment by the same company on the producer's record.

The system updates the value of the **Term Date** field on the producer record in Producer Central under the following conditions:

- If the terminated appointment **Status/Reason Date** on the external data source report is later than the most recent **Status/Reason Date** of an inactive supporting license **Line of Authority** on the external data source report.
- If the terminated appointment **Status/Reason Date** on the external data source report is later than the appointment **Term Date** on the producer record.

Data Normalizer – N/A

Section: Automatically Resolved Data Messages

INACTIVE APPOINTMENT WITHOUT SUPPORTING LICENSE OR LOA.

Appointment information obtained from the external data source includes an inactive appointment for which code use indicators are enabled in your company's Sircon platform.

However, the external data source report also included an inactive qualification (LOA) and/or license that support the inactive appointment and for which code use indicators are not enabled in your company's Sircon platform environment.

Note: For more information about code use indicators, refer to the [Administration in Producer Central Quick Guide](#).

System Action

The system does not add the inactive appointment to an affected producer record in Producer Central.

If the appointment already exists on the producer record, the system removes it.

Data Normalizer – InactiveUnsupportedLicensesAndApptsProducerScrubber

PDB APPOINTMENT DATE PRIOR TO PDB LICENSE ORIGINAL ISSUE DATE.

Appointment information obtained from the external data source includes a company appointment for which the **Status/Reason Date** precedes the **Issue Date** of its supporting license.

System Action

The system updates the values of the license and related qualification(s) **(LOA) Original Issue Date** and **Effective Date** fields on the affected producer record in Producer Central with the value of the **Status/Reason Date** of the oldest active or inactive appointment on the external data source report that is supported by the license.

Note: The system chooses the oldest, supported appointment on the external data source report, regardless of whether it is supported in the state by the appointing company configuration in your company's instance of the Sircon platform.

Data Normalizer – N/A

Section: Automatically Resolved Data Messages

PDB APPOINTMENT DATE PRIOR TO PDB LOA STATUS DATE. OR PDB APPOINTMENT DATE PRIOR TO PDB QUALIFICATION STATUS DATE.

Appointment information obtained from the external data source includes a company appointment for which the **Status/Reason Date** precedes the **Status/Reason Date** of its supporting LOA.

System Action

The system updates the values of the qualification (LOA) **Original Issue Date** and **Effective Date** fields on the affected producer record in Producer Central with the value of the **Status/Reason Date** of the oldest active or inactive appointment on the external data source report that is supported by the license.

Note: The system chooses the oldest, supported appointment on the external data source report, regardless of whether it is supported in the state by the appointing company configuration in your company's instance of the Sircon platform.

Note: The State of Washington requires appointments by LOA but does not track appointments by LOA. To accommodate this situation, the system updates qualification date fields on the affected producer's record based on the **Status/Reason Date** of the oldest appointment on the external data source report, regardless of whether it is supported by the qualification.

Note: In states that require appointment by LOA, the system does not update the date fields for Variable qualifications (i.e., Variable Annuity, Variable Contracts, Variable Life, etc.)

Data Normalizer – N/A

Section: Automatically Resolved Data Messages

PDB APPOINTMENT DATE PRIOR TO PDB QUALIFICATION ORIGINAL ISSUE DATE.

Appointment information obtained from the external data source includes a company appointment for which the **Status/Reason Date** precedes the **Authority Issue Date** of its supporting LOA.

System Action

The system updates the values of the qualification **(LOA) Original Issue Date** and **Effective Date** fields on the affected producer record in Producer Central with the value of the **Status/Reason Date** of the oldest active or inactive appointment on the external data source report that is supported by the license.

Note: The system chooses the oldest, supported appointment on the external data source report, regardless of whether it is supported in the state by the appointing company configuration in your company's instance of the Sircon platform.

Note: The State of Washington requires appointments by LOA but does not track appointments by LOA. To accommodate this situation, the system updates qualification date fields on the affected producer's record based on the **Authority Issue Date** of the oldest appointment on the external data source report, regardless of whether it is supported by the qualification.

Data Normalizer – N/A

THE [APPOINTMENT TYPE] [APPOINTMENT] IN [STATE] BECAME HISTORICAL ON [EFFECTIVE DATE].

The external data source report contains information regarding an appointment type that the issuing state stopped supporting on a given date. The affected producer's record in Producer Central contains an appointment of the now-historical type.

System Action

For the stated appointment, the system updates the affected producer record in Producer Central as follows:

- Updates the value of the **Status** field with **Inactive**
- Updates the value of the **Effective Date** field with the date on which the state made the appointment type historical
- Updates the value of the **Term Reason** field with **Canceled**


Data Normalizer – N/A

Processing Messages to Review

Occasionally, when attempting to process an automated data reconciliation sync Producer Central encounters errors or issues that the data “normalizers” described in the preceding section cannot resolve automatically.

Such errors or issues are displayed in the **Processing Messages to Review** section of the *Data Reconciliation Details* page.

Data Reconciliation Details




EASLEY, CORA Unrated

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

Overview

Action: Force Refresh Data
Requested By: Lauren Hall
Status: Processed
Status Date: 06-13-2023 1:23 PM
States: All States

Reports:

-  [Producer Record Updates](#)
-  [PDB Data](#)

Processing Messages to Review

Review Status: ⚠️ 1 Unreviewed
[Review All](#) / [Reset All](#)

Reviewed	State	Type	Processing Message
⚠️ Mark as Reviewed	Delaware		License: Original Issue Date must be on or before Effective Date for the Insurance Producer license in Delaware. This external record will be ignored when merging.

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

Some processing messages indicate inconsistent data that Producer Central cannot “normalize” and has excluded from being merged to a producer record, while other messages indicate other irregularities that require user attention or intervention.

This section includes reference for the most common automated data reconciliation processing messages. The list below is intended to help you understand these messages and to suggest steps you can take to resolve errors. Processing messages are sorted in alphabetical order by Processing Message. Each processing message includes the following information:


- **Processing Message:** The message displayed in the Processing Messages section of the *Data Reconciliation Details* page.
- **Type:** The type of processing message displayed.
- **Affected Producer Central Data or Functions:** Lists the specific pages or functions that the results of processing affect.
- **Definition:** A description of the data inconsistency encountered during automated data reconciliation that Sircon Producer Central could not resolve automatically
- **Resolution:** Suggested manual user steps to overcome the data anomaly.

Section: Processing Messages to Review

In many cases, a suggested resolution involves examining the external data source report used in the automated data reconciliation operation.

1. To open the external data source, navigate to the reports section of the *Data Reconciliation Details* page.
2. Open the **PDB Data** report or the **Education Report**.

Data Reconciliation Details


EASLEY, CORA Unrated

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

Overview

Action: Force Refresh Data
Requested By: Lauren Hall
Status: Processed
Status Date: 06-13-2023 1:23 PM
States: All States

Processing Messages to Review


Review Status: ⚠ 1 Unreviewed


Review All / Reset All

Reviewed	State	Type	Processing Message
⚠ Mark as Reviewed	Delaware		License: Original Issue Date must be on or before Effective Date for the Insurance Producer license in Delaware. This external record will be ignored when merging.

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

Reports:

 [Producer Record Updates](#)

 [PDB Data](#)

Note: To quickly navigate to the error message you need, refer to the [Table of Contents](#).

Common Processing Errors

A MATCHING RECORD WITH THE NPN [NATIONAL PRODUCER NUMBER] COULD NOT BE LOCATED WITHIN PDB.

When attempting to process automated data reconciliation based on a National Producer Number producer identifier, the system could not find the producer in the external data source.

No information was merged from the external data source to the producer record.

Affected Producer Data or Functions

- Details
- Quick Load Producers

Resolution Steps

1. Verify correct and complete entry of producer's name and National Producer Number.

A MATCHING RECORD WITH THE TIN [SOCIAL SECURITY NUMBER/FEDERAL EMPLOYER IDENTIFICATION NUMBER] COULD NOT BE LOCATED WITHIN THE PDB.

The system could not retrieve data from an external source based on the lookup criteria provided (i.e., last name and Social Security Number for an individual producer; business name and Federal Employer Identification Number for a firm producer). The error prevented a producer record from being added to Producer Central.

Affected Producer Data or Functions

- Details
- Quick Add Producer
- Quick Load Producers
- Producer Express Sync

Resolution Steps

1. Verify correct and complete entry of producer name.
2. Verify correct and complete entry of producer taxpayer identification number.
3. Verify effective date of producer licensure. A lag between license date and the date that a newly licensed producer's record is added to the external data source.

Section: Processing Messages to Review

AN ISSUE WAS ENCOUNTERED WHILE TRYING TO PROCESS THE PRODUCER. PLEASE CONTACT CUSTOMER SUPPORT IF THE ISSUE PERSISTS.

The system encountered an internal error when attempting to process automated data reconciliation.

The automated data reconciliation could not be processed, and no information was merged from the external data source to the producer record.

Affected Producer Data or Functions

- Details Aliases
- Contact Information Licenses/Qualifications
- Appointments
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Note the **Date**, **Time**, and **Indv ID** or **Firm ID** number for the affected record.
2. Contact your Vertafore representative for assistance.

APPOINTMENT: ACTIVE DATE FOR THE [APPOINTMENT TYPE] APPOINTMENT WITH [APPOINTING COMPANY] IN [STATE] IS REQUIRED. THIS EXTERNAL RECORD WILL BE IGNORED WHEN MERGING.

Appointment information obtained from the external data source for the specified state did not include a status or effective date.

The appointment was not merged from the external data source to the producer record.

Affected Producer Data or Functions

- Appointments
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Look up the appointment on the external data source report or the producer lookup website of the department of insurance in the specified state.
2. Manually enter the appointment information on the producer's record.
3. Re-attempt automated data reconciliation of the producer record later.
4. If issue is still not resolved, contact your Vertafore representative or the department of insurance in the specified state.

APPOINTMENT: [APPOINTING COMPANY] ([NAIC ID]) DOES NOT SUPPORT THE [APPOINTMENT TYPE] APPOINTMENT IN [STATE]. THIS EXTERNAL RECORD WILL BE IGNORED WHEN MERGING.

Appointment information obtained from the external data source included an active appointment of a type that is not configured in Producer Central for the specified appointing company in the specified state.

The appointing company configuration prevented the producer record from being updated with the appointment information.

Affected Producer Data or Functions

- Appointments
- Company State Appointment Details
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Review the **State Appointment Details** data section on the record of the specified company (**Companies menu > Company > Review/Update Company > Search for Appointing Company > State Appointment Details**).
2. Update the company record to include the specified appointment type in the specified state.
3. Re-perform automatic data reconciliation of the producer record. The appointment should now merge to the record.

Section: Processing Messages to Review

APPOINTMENT: [APPOINTMENT TYPE] APPOINTMENT WITH [APPOINTING COMPANY (NAIC ID)] IN [STATE] DOES NOT HAVE THE NECESSARY SUPPORTING LICENSE(S) AND/OR QUALIFICATION(S).

Appointment information for the specified state obtained from the external data source could not be merged to the producer's record, for one of the following reasons:

- Improperly configured code use indicators in your company's instance of the Sircon platform
- Invalid data obtained from the external data source
- The specified appointment type is unsupported in the Sircon platform
- Corruption from pre-existing Producer Central data, automatically resolved data issue ("normalizers") processing, or complicated data merging logic.

Affected Producer Data or Functions

- Appointments Licenses/Qualifications
- View Code Use Indicators
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Examine the external data source report for the specified appointment and its supporting qualification (line of authority) and license in the specified state and confirm that the status of all is "Active."
2. Review your company's code use indicator configuration on the View Code Use Indicators page in Producer Central (**Administration > Configure System > View Code Use Indicators**).
3. Confirm that the code use indicator status for the appointment type, license class, and qualification exists and is "On."
4. If one or both code use indicator status is "Off," contact your Vertafore representative and request that it be turned on.
5. If all code use indicators' status is "On," manually update the producer's record with the correct license, qualification, and appointment information as obtained from the external data source report.
6. If the *View Code Use Indicators* page does not list the same license type, qualification, or appointment type (On, Off, or Historical) as appears on the external data source report, then the license type, qualification, or appointment type may not be supported in the Sircon platform.
7. Re-attempt automated data reconciliation of the producer record later.
8. If issue is still not resolved, contact your Vertafore representative or the department of insurance in the specified state.

Section: Processing Messages to Review

APPOINTMENT: TERMINATION DATE MUST BE ON OR AFTER ACTIVE DATE FOR THE [APPOINTMENT TYPE] APPOINTMENT WITH [APPOINTING COMPANY] IN [STATE].

When attempting to merge appointment information for the specified state from the external data source to the producer record, the system discovered an appointment **Active Date** on the producer record that was later than the **Termination Status Date** for the appointment on the external data source.

The state appointment information was not merged from the external data source to the producer record.

Affected Producer Data or Functions

- Appointments
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Examine appointment information for the specified state on the affected producer record.
2. Manually update the appointment data on the producer record.
3. Re-attempt automated data reconciliation of the producer record later.
4. If issue is still not resolved, contact your Vertafore representative or the department of insurance in the specified state.

DUE TO ERRORS THAT PREVENTED SAVING, [STATE] WAS REMOVED FROM THE SYNC.

The external data source report contained invalid data for a state that could not be resolved automatically.

Rather than abort the entire automated data reconciliation, the system excluded only information from the specified state from being merged to the producer record.

Note: This is a general reconciliation error.

Affected Producer Data or Functions

- Details Aliases
- Contact Information Licenses/Qualifications Appointments
- Quick Add Producer

Section: Processing Messages to Review

- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Review other processing messages for the specified state.
2. If possible, resolve errors by manually updating the affected producer's record.
3. Re-attempt automated data reconciliation of the producer record later.

LAST NAME FOR [STATE] CANNOT EXCEED THE MAXIMUM ALLOWED LENGTH OF 35.

Last name information obtained from the external data source exceeded the maximum-allowed characters in the equivalent field on the affected individual producer's record in Producer Central.

The error prevented the producer record from being added or updated in Producer Central.

Affected Producer Data or Functions

- Details
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Examine the external data source report, and enter the data manually on the producer record, using abbreviations to fit the name information in the Last field.
2. Consider protecting the manually entered name information from incurring the same processing error in the future by choosing a data reconciliation profile with a merge strategy that does not update demographic information. (For more information, see the Producer Central online help.)

Section: Processing Messages to Review

LAST NAME FOR [STATE] MUST BE AT LEAST 2 CHARACTERS.

Individual last name, included in the Quick Load Producers data file or Producer Express request or obtained from the external data source, was missing or contained fewer than the minimum-required characters.

The error prevented the producer record from being added to Producer Central.

Affected Producer Data or Functions

- Details
- Quick Load Producers
- Producer Express Sync

Resolution Steps

1. Verify correct and complete entry of producer name.

LAST NAME FOR [STATE] SHOULD NOT CONTAIN ANY DIGITS.

Last name information obtained from the external data source contained numeric characters, an invalid data condition in the equivalent field in Producer Central.

The error prevented the producer record from being added or updated in Producer Central.

Affected Producer Data or Functions

- Details
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Examine the external data source report, and enter the data manually on the producer record, avoiding the use of numeric characters in the Last field.
2. Consider protecting the manually entered name information from incurring the same processing error in the future by choosing a data reconciliation profile with a merge strategy that does not update demographic information. (For more information, see the Producer Central online help.)

Section: Processing Messages to Review

LICENSE: EFFECTIVE DATE FOR THE [LICENSE TYPE] LICENSE IN [STATE] IS REQUIRED. THIS EXTERNAL RECORD WILL BE IGNORED WHEN MERGING.

License information obtained from the external data source for the specified state did not include an effective date. Data normalizers could not derive a date from related qualification or appointment information.

The license was not merged from the external data source to the producer record.

Affected Producer Data or Functions

- Licenses/Qualifications
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Look up the license on the external data source report or the producer lookup website of the department of insurance in the specified state.
2. Manually enter the license information on the producer's record.
3. Protect the license information from being overwritten by future automated data reconciliation, either by locking it or using a non-destructive merge strategy. (For more information on locking data and merge strategies, consult the Producer Manger online help.)

LICENSE: EXPIRATION DATE MUST BE ON OR AFTER ORIGINAL ISSUE DATE FOR THE [LICENSE TYPE] LICENSE IN [STATE].

When attempting to merge license information for the specified state from the external data source to the producer record, the system discovered a license **Original Issue Date** on the producer record that was later than the **Expiration Date** for the license from the external data source.

The state license information was not merged from the external data source to the producer record.

Affected Producer Data or Functions

- Details Licenses/Qualifications
- Quick Load Producers
- Quick Sync Producer

Section: Processing Messages to Review

- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Examine license information for the specified state on the affected producer record.
2. Manually update the license data on the producer record.
3. Re-attempt automated data reconciliation of the producer record later.
4. If issue is still not resolved, contact your Vertafore representative or the department of insurance in the specified state.

LICENSE: LICENSE NUMBER IS REQUIRED FOR [STATE].

The license number associated with an active license on the producer's record in Producer Central is missing. An internal system rule ('LIC_TYPE_RQD_SIRCON_IND'='Y' for that state) requires a license number value.

The error prevented the producer record from being updated in Producer Central.

Affected Producer Data or Functions

- Licenses/Qualifications
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Use the Correct License Data page in Producer Central (**Licensing > Data Fix > Correct License Data**) to insert a placeholder value into the License Number field of the license.
2. Re-attempt automated data reconciliation. The record should be updated, with the correct license number obtained from the external data source should overwrite the placeholder value.

Section: Processing Messages to Review

LICENSE: [LICENSE TYPE] LICENSE FOR [STATE] DOES NOT HAVE THE NECESSARY SUPPORTING QUALIFICATION(S).

License and qualification information for the specified state obtained from the external data source could not be merged to the producer's record, for one of the following reasons:

- Improperly configured code use indicators in your company's instance of the Sircon platform
- Invalid data obtained from the external data source
- The specified license type or qualification(s) is unsupported in the Sircon platform.
- Corruption from pre-existing Producer Central data, automatically resolved data issue ("normalizers") processing, or complicated data merging logic.

Affected Producer Data or Functions

- Licenses/Qualifications
- View Code Use Indicators
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Examine the external data source report for the specified qualification (line of authority) and related license class in the specified state and confirm that the status of both is "Active."
2. Review your company's code use indicator configuration on the View Code Use Indicators page in Producer Central (**Administration > Configure System > View Code Use Indicators**).
3. Confirm that the code use indicator status for the license and qualification exists and is "On."
4. If one or both code use indicator status is "Off," contact your Vertafore representative and request that it be turned on.
5. If both code use indicators' status is "On," manually update the producer's record with the correct license and qualification information as obtained from the external data source report.
6. If the View Code Use Indicators page does not list the same license type or qualification (On, Off, or Historical) as appears on the external data source report, then the license type or qualification may not be supported in the Sircon platform.
7. Re-attempt automated data reconciliation of the producer record later.
8. If issue is still not resolved, contact your Vertafore representative or the department of insurance in the specified state.

Section: Processing Messages to Review

LICENSE: THE [STATE] [LICENSE TYPE] ([LICENSE NUMBER]) MIGHT HAVE AN INACTIVE PERIOD SINCE THE LAST SYNC.

If the **License Status Date** is after the **Expiration Date** an information message indicating that a producer might have renewed late is provided.

Affected Producer Data or Functions

- Licenses

Resolution Steps

1. A status date that is after an expiration date could indicate that the producer renewed late and the license should have been considered inactive for a time.

LINE [ADDRESS LINE NUMBER] FOR [ADDRESS TYPE] ADDRESS CANNOT EXCEED THE MAXIMUM ALLOWED LENGTH OF 40.

Address line information obtained from the external data source exceeded the maximum-allowed characters in the equivalent field on the affected producer's record in Producer Central.

Address information from the external data source was not merged to the producer record.

Affected Producer Data or Functions

- Contact Information
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Examine the external data source report, and enter the data manually on the producer record, using abbreviations to fit the address information in a single address line.
2. Examine the external data source report, and enter the data manually on the producer record, breaking the address information into multiple lines.
3. Consider protecting the manually entered address information from incurring the same processing error in the future by choosing a data reconciliation profile with a merge strategy that does not update address information.

Section: Processing Messages to Review

NAME FOR [STATE] CANNOT EXCEED THE MAXIMUM ALLOWED LENGTH OF 72.

Business name information obtained from the external data source exceeded the maximum-allowed characters in the equivalent field on the affected firm producer's record in Producer Central.

The error prevented the producer record from being added or updated in Producer Central.

Affected Producer Data or Functions

- Details
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Examine the external data source report, and enter the data manually on the producer record, using abbreviations to fit the name information in the Name field.
2. Consider protecting the manually entered name information from incurring the same processing error in the future by choosing a data reconciliation profile with a merge strategy that does not update demographic information.

POSTAL CODE FOR [ADDRESS TYPE] ADDRESS IS REQUIRED WHEN STATE OR PROVINCE ARE PROVIDED.

Address information obtained from the external data source for a particular address type did not include Postal Code, a required field on the affected producer's record in Producer Central.

Address information from the external data source was not merged to the producer record.

Affected Producer Data or Functions

- Contact Information
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Obtain postal or ZIP code information for the particular address type from a third-party source and enter the data manually on the producer record.
2. Consider protecting the manually entered address information from incurring the same processing error in the future by choosing a data reconciliation profile with a merge strategy that does not update address information. (For more information, see the Producer Central online help.)

PRODUCER WAS ALREADY UP TO DATE WITH PDB. NO SYNCHRONIZATION WAS NECESSARY.

When attempting to process automated data reconciliation, the system discovered that the Last Sync Date on the affected producer record is more recent than the last-updated date of any information on the external data source.

No information was merged from the external data source to the producer record.

Note: This processing message may display as an unintended consequence of the configuration of the **OVRRD_PDB_STS_DTE_IN_DAYS** business rule.

Affected Producer Data or Functions

- Details
- Aliases
- Contact Information Licenses/Qualifications
- Appointments
- Quick Load Producers
- Quick Sync Producer Scheduled Syncs Producer Express Sync

Resolution Steps

1. No action is necessary.

Section: Processing Messages to Review

QUALIFICATION: EFFECTIVE DATE FOR THE [QUALIFICATION DESCRIPTION] QUALIFICATION IN [STATE] IS REQUIRED. THIS EXTERNAL RECORD WILL BE IGNORED WHEN MERGING.

Qualification information obtained from the external data source for the specified state did not include an effective date.

Data normalizers could not derive a date from related license or appointment information.

The qualification and its related license were not merged from the external data source to the producer record.

Affected Producer Data or Functions

- Licenses/Qualifications
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Look up the qualification and its supporting license on the external data source report or the producer lookup website of the department of insurance in the specified state.
2. Manually enter the license/qualification information on the producer's record.
3. Protect the license/qualification information from being overwritten by future automated data reconciliation, either by locking it or using a non- destructive merge strategy.

QUALIFICATION: ORIGINAL ISSUE DATE FOR THE [QUALIFICATION DESCRIPTION] QUALIFICATION IN [STATE] MUST BE ON OR BEFORE EFFECTIVE DATE.

When attempting to merge qualification (LOA) information for the specified state from the external data source to the producer record, the system discovered a qualification **Original Issue Date** on the producer record that was later than the **Status/Reason Date** for the qualification from the external data source.

The state qualification information was not merged from the external data source to the producer record.

Affected Producer Data or Functions

- Licenses/Qualifications
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Examine qualification information for the specified state on the affected producer record.
2. Manually update the qualification data on the producer record.
3. Re-attempt automated data reconciliation of the producer record later.
4. If issue is still not resolved, contact your Vertafore representative or the department of insurance in the specified state.

QUALIFICATION: [QUALIFICATION DESCRIPTION] QUALIFICATION FOR [STATE] REQUIRES AN ACTIVE LICENSE.

License and qualification information for the specified state obtained from the external data source could not be merged to the producer's record, for one of the following reasons:

- Improperly configured code use indicators in your company's instance of the Sircon platform
- Invalid data obtained from the external data source
- The specified license type or qualification(s) is unsupported in the Sircon platform
- Corruption from pre-existing Producer Central data, automatically resolved data issue ("normalizers") processing, or complicated data merging logic.

Affected Producer Data or Functions

- Licenses/Qualifications
- View Code Use Indicators
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Examine the external data source report for the specified qualification (line of authority) and related license class in the specified state and confirm that the status of both is "Active."
2. Review your company's code use indicator configuration on the *View Code Use Indicators* page in Producer Central (**Administration > Configure System > View Code Use Indicators**).
3. Confirm that the code use indicator status for the license and qualification exists and is "On."
4. If one or both code use indicator status is "Off," contact your Vertafore representative and request that it be turned on.
5. If both code use indicators' status is "On," manually update the producer's record with the correct license and qualification information as obtained from the external data source report.
6. If the View Code Use Indicators page does not list the same license type or qualification (On, Off, or Historical) as appears on the external data source report, then the license type or qualification may not be supported in the Sircon platform.
7. Re-attempt automated data reconciliation of the producer record later.
8. If issue is still not resolved, contact your Vertafore representative or the department of insurance in the specified state.

[STATE] COULD NOT BE SYNCHRONIZED BECAUSE MULTIPLE ACTIVE LICENSES OF OPPOSING RESIDENCY IN THE SAME STATE INDICATE A SITUATION THAT CANNOT BE RESOLVED AUTOMATICALLY

License information obtained from the external data source includes active resident and non-resident licenses in the same license state.

None of the state licenses was merged from the external data source to the producer record.

Note: Processing logic does not affect inactive licenses.

Affected Producer Data or Functions

- Licenses/Qualifications
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Section: Processing Messages to Review

Resolution Steps

1. Look up the license information on the external data source report or the producer lookup website of the department of insurance in the specified state.
2. Manually enter the correct license information on the affected producer's record.
3. Consider contacting the state department of insurance to request a regulatory update of the affected producer's record.
4. Re-attempt automated data reconciliation of the producer record later.

[STATE] COULD NOT BE SYNCHRONIZED BECAUSE MULTIPLE ACTIVE LICENSES OF THE SAME TYPE IN THE SAME STATE INDICATE A SITUATION THAT CANNOT BE RESOLVED AUTOMATICALLY.

License information obtained from the external data source included multiple licenses of the same license type in the specified state. This condition occurs typically for a firm with multiple branch locations, all of which share an identical Federal Employer Identification Number (EIN).

None of the identical licenses was merged from the external data source to the producer record.

Affected Producer Data or Functions

- Licenses/Qualifications
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Examine the external data source report and enter the multiple licenses of the same license type manually in Producer Central.
2. Depending on your company's record-keeping strategy for keeping records of a firm's multiple branch locations, you may enter the license information on a single master agency record or on separate records for each location.

Section: Processing Messages to Review

[STATE] WAS NOT SYNCHRONIZED BECAUSE THERE WAS NO [STATE] DATA ON THE PDB REPORT AND [STATE] DOES NOT REPORT SOME LICENSED [ENTITY TYPE] TO THE PDB.

Information about certain licenses in certain states is never available from the external data source.

The external data source did not contain information in one of these states about a license that is recorded in Producer Central on the affected producer's record.

Logic in Producer Central accounts for these conditions, and so the specified state license information on the producer record was not affected in any way by automated data reconciliation.

Affected Producer Data or Functions

- Licenses/Qualifications
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Look up the license information on the producer lookup website of the department of insurance in the specified state.
2. Manually update the license information on the affected producer's record.

THE [LICENSE TYPE] LICENSE IN [STATE] IS MISSING AN EXPIRATION DATE.

License information obtained from the external data source for the specified state did not include an expiration date. Data normalizers could not derive a date from other information on the affected producer's record.

Note: Data normalizers are Vertafore- configurable to be capable of resolving most issues where a license lacks an expiration date, by deriving a date from related qualification data, other license information, CE renewal information, or producer birth date.

Note: If the *create.messages.for.missing.lic.expr.date* business rule is enabled, after processing an automated data reconciliation operation the system will generate a **Processing Message to Review** if an active license on a producer record has a non-populated **Expiration Date** field.

Affected Producer Data or Functions

- Licenses/Qualifications
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Look up the license on the external data source report or the producer lookup website of the department of insurance in the specified state.
2. Manually enter the missing license information on the producer's record.
3. Protect the license information from being overwritten by future automated data reconciliation, either by locking it or using a non-destructive merge strategy. (For more information on locking data and merge strategies, consult the Producer Manger online help.)

THE [LICENSE TYPE] LICENSE TYPE IN [STATE] WAS EXCLUDED FROM THE SYNC BECAUSE THE EXISTENCE OF MULTIPLE INACTIVE LICENSES ON THE PDB REPORT INDICATES A SITUATION THAT CANNOT BE RESOLVED AUTOMATICALLY.

License information obtained from the external data source included an inactive license of the specified license type, for which the code use indicator in your company's instance of the Sicon platform is turned off.

The inactive license was not merged from the external data source to the producer record.

Affected Producer Data or Functions

- Licenses/Qualifications
- View Code Use Indicators
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Usually, no action is necessary.
2. This situation occurs frequently when a state globally changes license classifications and switches all active licenses from the old classification to the new.
3. If desired, enter a note regarding the state change in license classifications in the Comment field corresponding to the producer's active license of the new license type.

THE PDB RESULT RETURNED CONTAINED INVALID DATA FOR THE PRODUCER AND COULD NOT BE PROCESSED.

The system encountered an internal error when attempting to process automated data reconciliation.

The automated data reconciliation could not be processed, and no information was merged from the external data source to the producer record.

Affected Producer Data or Functions

- Details
- Aliases
- Contact Information Licenses/Qualifications
- Appointments
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Re-attempt automated data reconciliation of the producer record later.
2. If issue is still not resolved, contact your Vertafore representative for assistance.

Section: Processing Messages to Review

THE SYNC FAILED BECAUSE VALIDATION ERRORS EXISTED THAT PREVENTED SAVING ANY CHANGES.

The external data source report contained invalid data for multiple states that could not be resolved automatically.

No information was merged from the external data source to the producer record.

Affected Producer Data or Functions

- Details Aliases
- Contact Information
- Licenses/Qualifications
- Appointments
- Quick Add Producer
- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Review other processing messages.
2. If possible, resolve errors by manually updating the affected producer's record.
3. Re-attempt automated data reconciliation of the producer record later.

THE SYNC FAILED DUE TO PRE-EXISTING ERRORS ON THE PRODUCER RECORD THAT PREVENTED SAVING.

When attempting to merge data from the external data source to the producer record, the system discovered invalid data on the producer record that prevented automated data reconciliation from succeeding.

No information was merged from the external data source to the producer record.

Affected Producer Data or Functions

- Details
- Aliases
- Contact Information
- Licenses/Qualifications
- Appointments
- Quick Add Producer

Section: Processing Messages to Review

- Quick Load Producers
- Quick Sync Producer
- Scheduled Syncs
- Producer Express Sync

Resolution Steps

1. Review other processing messages.
2. If possible, resolve errors by manually updating the affected producer's record.
3. Re-attempt automated data reconciliation of the producer record later.

APPENDIX 1: Sircon for Carriers Help Resources

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

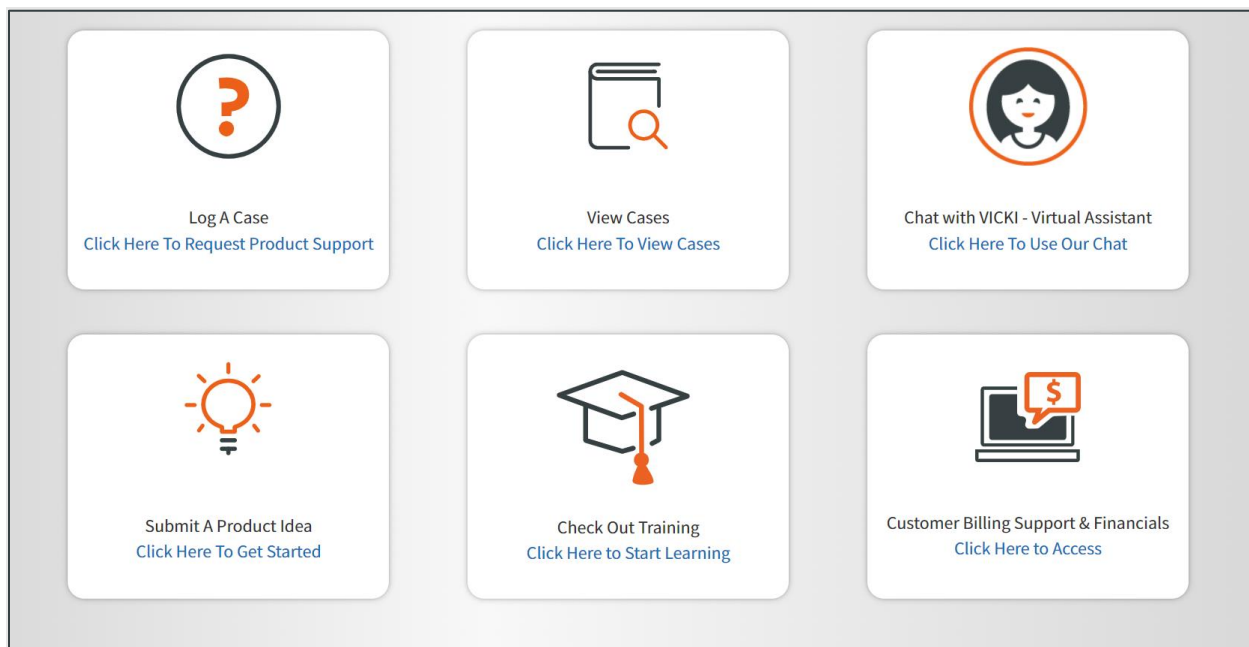
- My Vertafore
- Sircon Support

My Vertafore

My Vertafore is our free online customer support portal and knowledge base.

With [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



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	6/30/2023	Original Document



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