Sircon
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SIRCON FOR CARRIERS

Data Loads in Producer Central

Vertafore

Section: Overview

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Overview

In this quick guide, we will review load producer data in Sircon for Carriers.

Producer Lifecycle Management

Add Producer to Organization	Maintain Producer	Complete Sales Authorization	Appoint Producer	Terminate Producer
Add producers to your network and connect them to daily PDB updates	Update producer records with demographic changes	Verify producer is properly licensed with Sales Authorization	Submit producer appointments to the states	Terminate appointments and disconnect subscription

The first step to manage your producers is to add producers to your organization. You can add individual licensees (such as producers and adjusters) or firms (such as agencies and securities firms).

When you add a producer to your network, Producer Central will create a **Producer Record** and will connect the producer to your account. A producer record stores all the relevant licensing and compliance information in one location. Here you can see information like:

- Producer Demographics
- Licenses
- Lines of Authority / Qualifications
- Appointments
- Employment History

When a producer is connected to your account, Producer Central will sync with the Producer Database (PDB) daily to keep the producer record up to date.

You only need to add a producer once. After they are added to your network, you can disconnect the producer from your organization to stop receiving PDB updates.

> **Note**: Your organization is charged based on the number of connected producers you maintain in Sircon for Carriers.

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Once you add a producer to your organization, you can:

- View their Producer Record
- Search for the Producer
- Add Appointments
- Assign the producer to Business Units and Cost Centers

In this quick guide, we will learn how to load the data of multiple producers into Sircon for Carriers. This process is helpful if you need to quickly add a large number of producers when you initially begin using Producer Central.

> **Note**: Additional quick guides will cover how to maintain producer records, complete sales authorizations, and complete appointments and terminations.

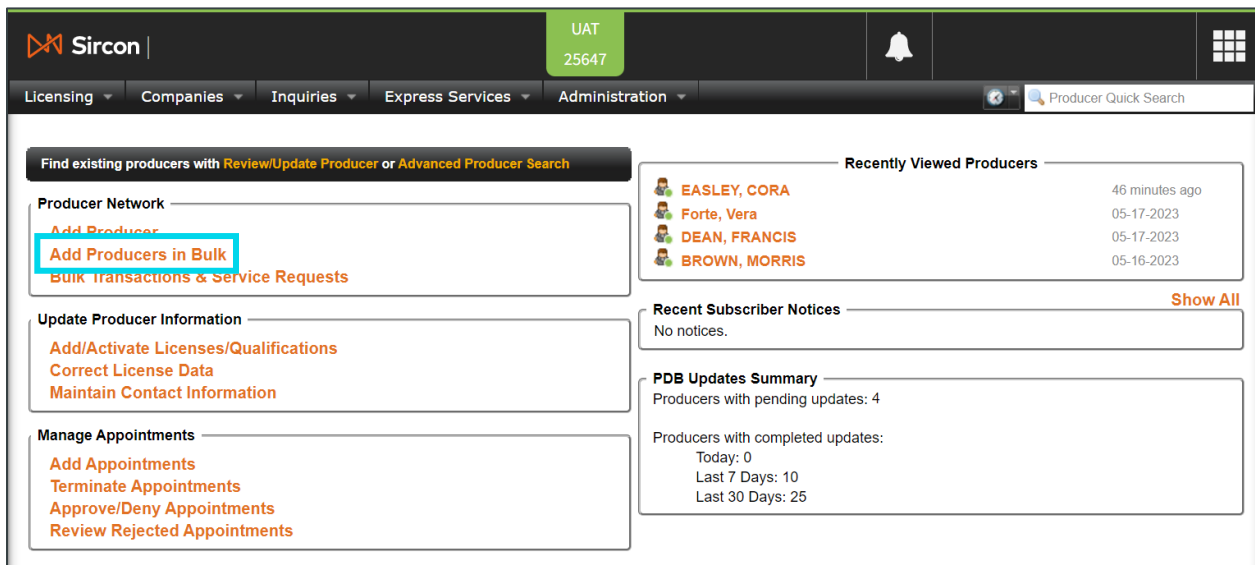## *Add Multiple Producers to your Organization*

At times, you may need to add a batch of producers to your account. You can use data loads during the initial setup of Producer Central or during a merger/acquisition.

On these occasions, you can upload a file to Producer Central containing basic information about the producers you want to add. Producer Central will then check the National Producer Database (PDB) for data on the producers listed in the file. If information matches, it will retrieve the data, and automatically create producer records in Producer Central based on the retrieved information.
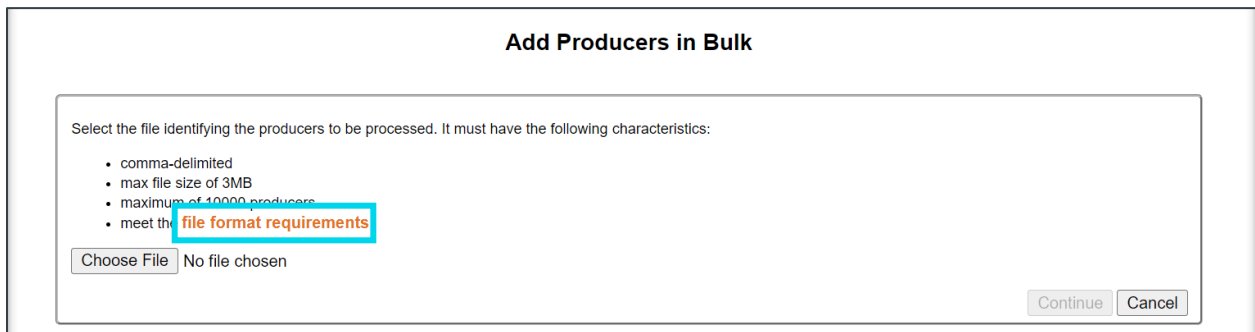
1. Start by clicking the **Add Producers in Bulk** option from the main page.

2. To add a batch of producer records to Producer Central, you must create a properly formatted **comma-delimited** (CSV) data file and then upload the file to the system. You can add a maximum of 10,000 producers at one time.
3. Click the **File Format Requirements** to learn how to format the CSV file.

![Vertafore logo]

Section: Add Multiple Producers to your Organization

4. You can now see the requirements to upload producers in bulk. The **File Instructions** show the required layout of the CSV file.
5. To create the load file, start by creating a spreadsheet using a program like Excel or Google Sheets.
6. The letters A-H represent the column headers in the file.
7. Depending on the **Producer Type**, the required fields will change.

> **Note**: The require fields may also change depending on whether your organization uses SSN numbers or NPN numbers to track producers. This is controlled by the INDV_REQUIRED_IDENTIFIERS business rule set.

File Instructions

Required fields are based on the current configuration.

The following values are accepted (in order):

    A. Producer Type (IL or AGY)
    B. Name (last name or firm name)
    C. TIN
    D. External System ID Type Code
    E. External System ID
    F. Business Unit Short Name
    G. Cost Center Name
    H. National Producer ID (NPN)

    * Required Fields

	A	B	C	D	E	F	G	H
1	IL	Smith	123-45-6789	ATJ	123456	BUONE		656565
2	IL	Green						112233
3	AGY	P & J Firm	09-8765432	VEN	AJ3290	BU TWO		

Note: To add records that do not already exist, you must either enter Name and TIN or Name and NPN for all individuals included in the file. For firms, Name and TIN must be provided to add new records. Optionally, you may enter a Business Unit and External System ID information, which will be added to the new record.

Individual Licensee Required Fields

If you have the **National Producer ID** (or **NPN**) number for the individual licensee, the required fields are:

Column	Field Name	Description
A	**Producer Type**	Use "**IL**" to indicate individual licensee
B	**Name**	Type the **Last Name** of the producer
H	**National Producer ID (NPN)**	Type the full **NPN** number of the producer

> **Note**: In the illustration below, we are including a column header as a reference. Column headers **must be deleted** before creating the final CSV file.

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A	B	C	D	E	F	G	H
Producer Type	Name	TIN (SSN)	External System ID Type Codes	External System ID	Business Unit Short Code	Cost Center Name	NPN
IL	Shelby		DEFAULT	852008	LIFE		1100000028

If you have the **Social Security Number** (or **SSN**) for the individual licensee, the required fields are:

Column	Field Name	Description
A	Producer Type	Use "**IL**" to indicate individual licensee
B	Name	Type the **Last Name** of the producer
C	TIN (Taxpayer ID)	Type the 9-digit **SSN** of the producer (with or without dashes)

> **Note**: In the illustration below, we are including a column header as a reference. Column headers **must be deleted** before creating the final CSV file.

A	B	C	D	E	F	G	H
Producer Type	Name	TIN (SSN)	External System ID Type Codes	External System ID	Business Unit Short Code	Cost Center Name	NPN
IL	Jones	999111000	DEFAULT	341032	PC		

Agency/Firm Required Fields

The required fields for agencies or firms are:

Column	Field Name	Description
A	Producer Type	Use "**AGY**" to indicate agency/firm
B	Name	Type the **Firm Name**
C	TIN (Taxpayer ID)	Type the 9-digit Employer Identification Number or **EIN** of the firm (with or without dashes).

> **Note**: In the illustration below, we are including a column header as a reference. Column headers **must be deleted** before creating the final CSV file.

A	B	C	D	E	F	G	H
Producer Type	Name	TIN (EIN)	External System ID Type Codes	External System ID	Business Unit Short Code	Cost Center Name	NPN
AGY	Dean and Davis Insurance Agency	00-6233077					

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Optional Fields

> **Note**: The required fields listed above are mandatory.
>
> It is generally recommended that you **only input the required fields into the file**. All the producer data you add to the file must match the producer record in Producer Central. If any of the fields are inaccurate, the file will fail.

Column	Field Name	Description
D	**External System ID Code**	Use this field along with the **External System ID (Column E)** to assign a writing number, producer code, or any other identifier of the producer that corresponds with your company's internal systems. Case sensitive. Value must exactly match an external system type code value that is already configured in Producer Central in the Code Type Indicators.
E	**External System ID**	Use this field along with **External System Type Code** (Column D) to assign a writing number, producer code, or any other identifier of the producer in another of your company's internal systems. 10 character maximum. * Required only if you are assigning an external system type code to a producer in the field above.
F	**Business Unit Short Name**	In order to submit transactions for a producer, they need to be assigned to a business unit and cost center. Use this field to associate the producer with a particular business unit. Case sensitive. Must exactly match the short name of a business unit that is already configured in

|		
		Producer Central. You can check the list of the business units by following the **Administration > Configure System > Maintain Business Unit** menu path.
G	**Cost Center Name**	In order to submit transactions for a producer, they need to be assigned to a business unit and cost center. Use this field to assign the fee to a cost center. Case sensitive. Must exactly match the name of a cost center that is already configured in Producer Central. You can view a list of the cost centers by following the **Administration > Configure System > Maintain Business Unit Cost Center** menu path.

8. Add the required information to your spreadsheet. When you are finished, you should have a spreadsheet that looks something like the following illustration:

	A	B	C	D	E	F	G	H
1	AGY	Dean and Davis Insurance Agency	00-6233077					
2	IL	Shelby		DEFAULT	852008	LIFE		1100000028
3	IL	Jones	9999111000	DEFAULT	341032	PC		

> **Note**: If you inserted a header row containing the field names to guide your data entry, you must **delete the header** before moving on to the next step.

9. When you are finished, from the **File** menu, select **Save As**.
10. The Save As window will open. From the Save As Type drop-down menu, select **CSV (Comma Delimited) (*.csv)**. In the **File Name** field, enter a name for the producer file.
11. Click **Save**.

Section: Add Multiple Producers to your Organization
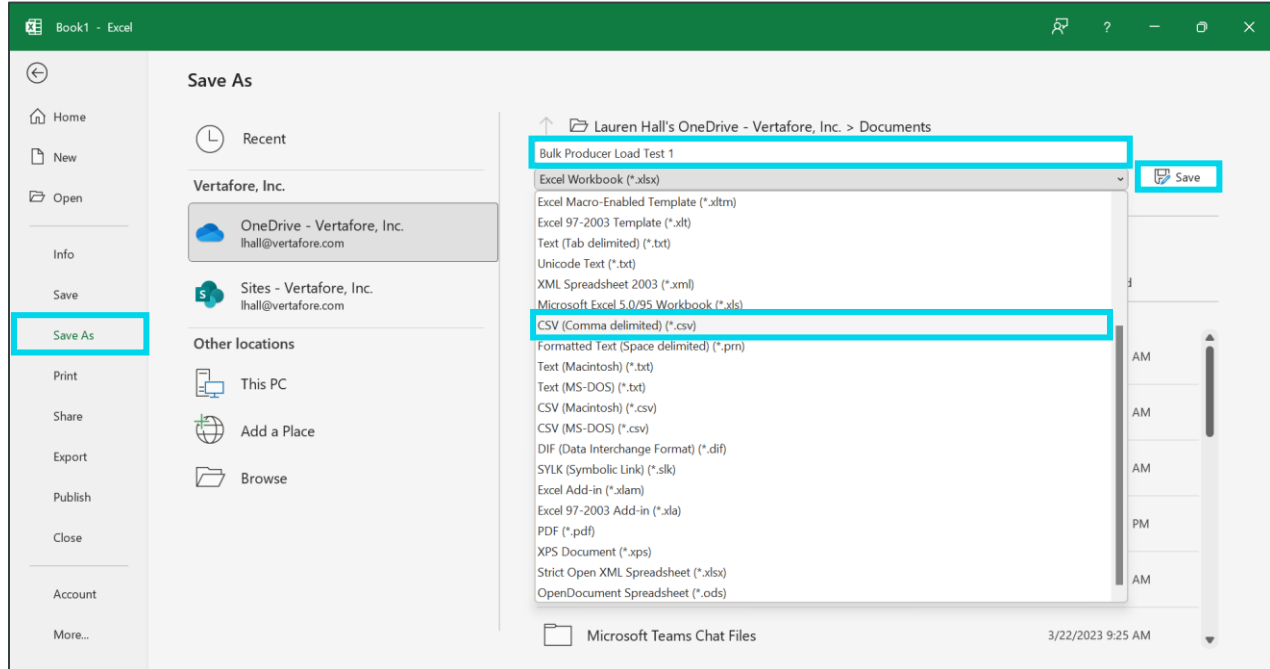
12. Your file is now saved in a comma-separated format and is ready for upload to Producer Central.
13. From the Add Producers in Bulk screen, click the **Choose File** button.
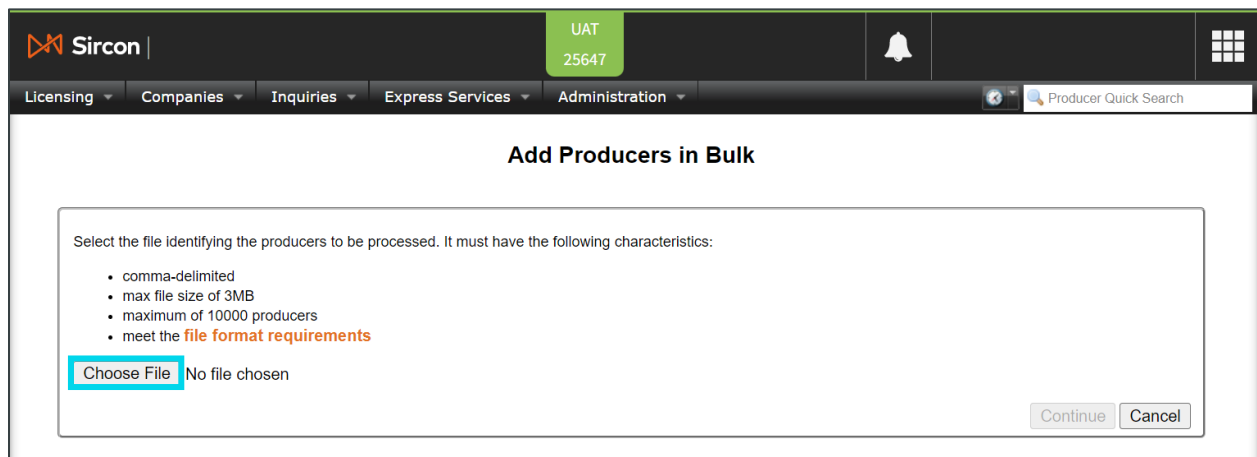
14. Use the navigation options on the **Choose File** dialog box to locate the upload file (*.csv) on your system.
15. When the correct file name appears in the **File Name** field, click the **Open** button.

Section: Add Multiple Producers to your Organization
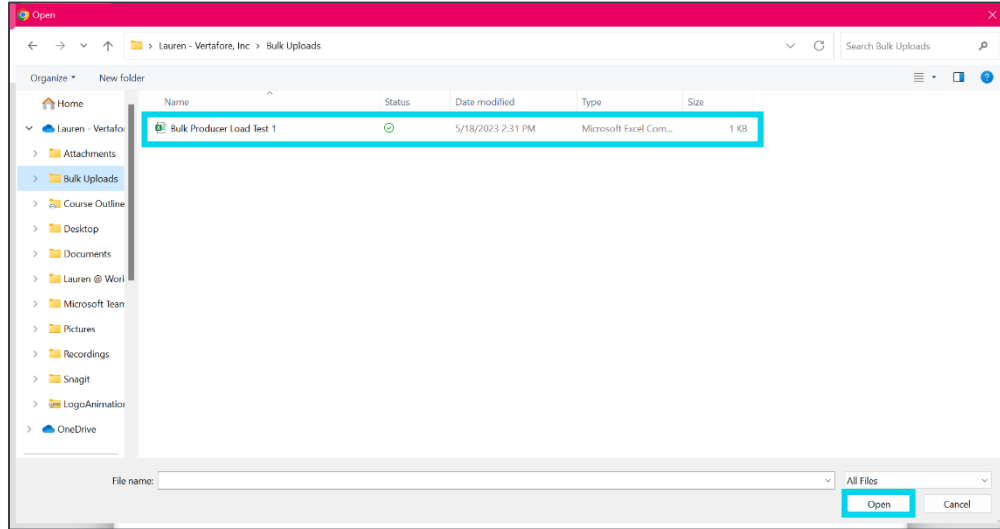
16. The file name will appear next to the **Choose File** button.
17. Click **Continue** to submit the file.

Add Producers in Bulk

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

- comma-delimited
- max file size of 3MB
- maximum of 10000 producers
- meet the **file format requirements**

Choose File   Bulk Produc...d Test 1.csv

Continue   Cancel

18. You will receive a message that says the number of producers found on the spreadsheet.

Add Producers in Bulk

Confirm File Contents

3 producers were found in Bulk Producer Load Test 1.csv.
☐ Allow producers not on the PDB to be created.
☐ Allow duplicate firms to be created.

Go Back   Upload Producers   Cancel

19. You will also see two checkboxes:
   - **Allow producers not on the PDB to be created** – If you select this checkbox, you will create producer records for any producers that were not located on the PDB. It is recommended to leave this option unchecked unless you are loading producers that are yet to be added to the PDB.

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- **Allow duplicate firms to be created** – If you check this option, you will create multiple duplicate firm producer records. It is recommended that you leave this option unchecked unless you need to perform branch office syncing.

20. Click **Upload Producers** to finish adding the producer records.

Add Producers in Bulk

Confirm File Contents

3 producers were found in Bulk Producer Load Test 1.csv.
☐ Allow producers not on the PDB to be created.
☐ Allow duplicate firms to be created.

[Go Back] [Upload Producers] [Cancel]

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21. You will receive a message that the file was loaded into our system. Depending on the size of the file, the amount of time it takes to complete the processing will vary. Click **View current processing status** of this file to see the load status.

Add Producers in Bulk

✔ The file Bulk Producer Load Test 1.csv was loaded into our system. Sircon will begin refreshing producer data within a few moments.

NEXT [View current processing status] of this file.

OR   I want to **load another file.**

---

22. You will now see the processing results. If a producer record was created successfully, you will see the name of the Producer is highlighted in **orange**. The **Status** of the item will show **Processed**.

| All Reports | Recent Reports | **Add Producers in Bulk** |

Processing Results

Processing results for the selected producer data source:

Filename	Source	Status	Run Date	Staff Member
Bulk Producer Load Test 1.csv	Bulk Add Producers	Processed	05-18-2023	Lauren Hall

Clear
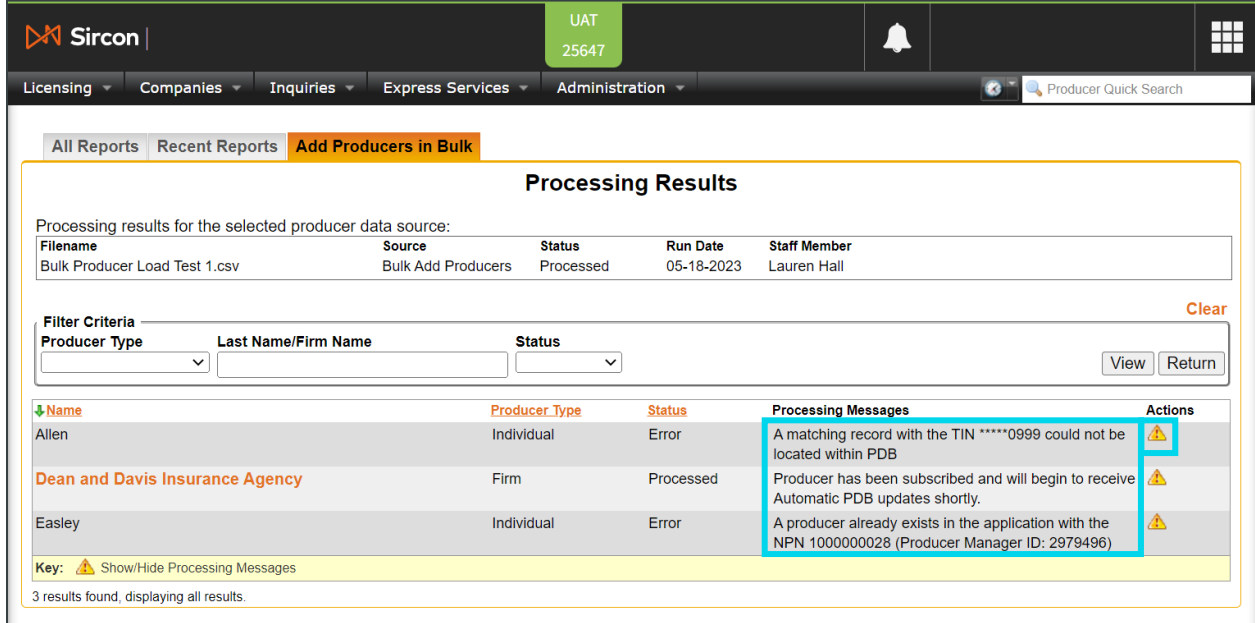
Filter Criteria

Producer Type	Last Name/Firm Name	Status		
⌄		⌄	[View]	[Return]

↓Name	Producer Type	Status	Processing Messages	Actions
Allen	Individual	Error	1 message	⚠
Dean and Davis Insurance Agency	Firm	Processed	1 message	⚠
Easley	Individual	Error	1 message	⚠

Key: ⚠ Show/Hide Processing Messages

3 results found, displaying all results.

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23. If any of the producer records failed to load, the **Status** will show **Error**. You can click the **Show Processing Messages** button (⚠) to display a message about why the data load failed.

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24. Review the Processing Messages to troubleshoot how to resolve each error. In the example above, we received two error messages:
    - A matching record for TIN could not be located in within the PDB.
    - A producer already exists in the application with the NPN.

25. Review the information submitted and determine if you need to correct any of the data inputted into the application.

Note: Refer to the Adding and Searching for Producers Quick Guide and the Maintain Producer Records Quick Guide for more information.

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

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

- My Vertafore

- Sircon Support

My Vertafore

My Vertafore is our free online customer support portal and knowledge base. At My Vertafore you can:

- **Log a Case** – Cases are used to request product support

- **Submit Ideas** – Send Vertafore ideas for new product features or enhancements

- **Search Knowledgebase** – Search for detailed articles on the Sircon Knowledge Base
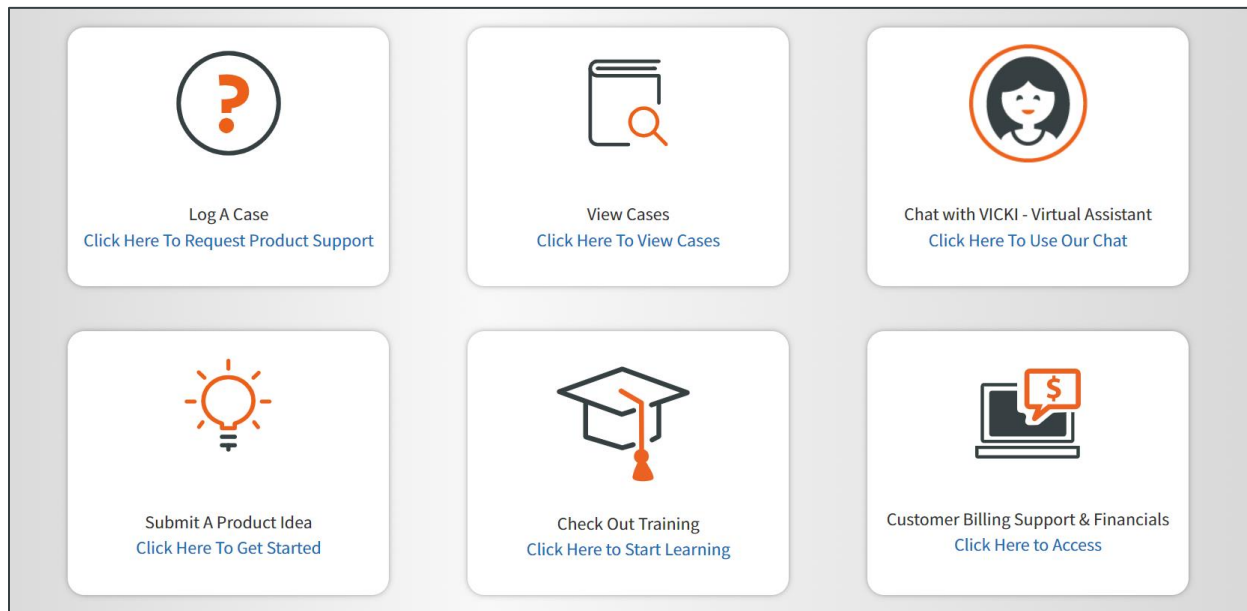
> **Note**: Sircon does not use the Submit a Product Idea or Chat with VICKI functions.

Contact Vertafore Customer Support

Can't find what you are looking for at My Vertafore? Our Customer Support team is here to help. Click here to email Support or call 877.876.4430.

APPENDIX 2: Document History

Version	Revision Date	Revision Record
1.0	6/14/2023	Original Document

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