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Sircon

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SIRCON FOR CARRIERS

Document Sharing

Section: Overview

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Overview

Sircon for Carriers is changing the way carriers connect with agents to help build lasting, productive sales relationships. Sircon Producer Central is expanding beyond the back office and onto the all-new Sircon Platform, enabling carriers to deliver an outstanding agent experience while extending their brand directly to the agent community via the Sircon network.

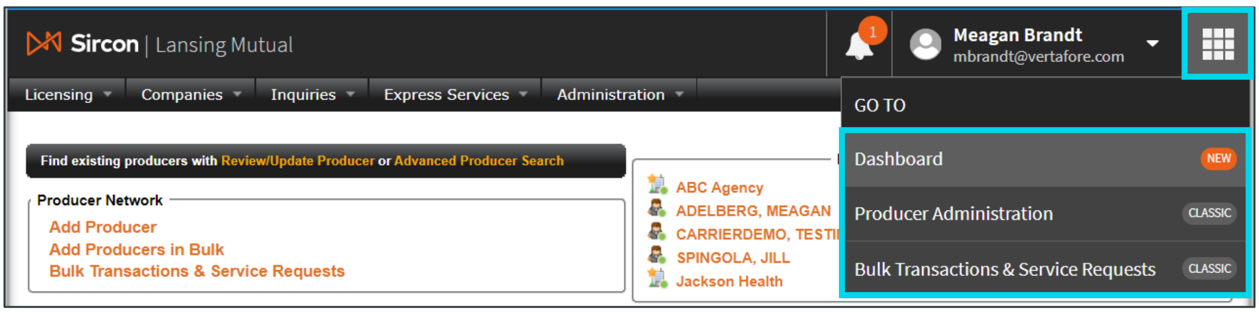
This guide gives an overview of the new Sircon look & feel, security access, and new capabilities that are unique to Producer Central.

Sircon Dashboard Overview

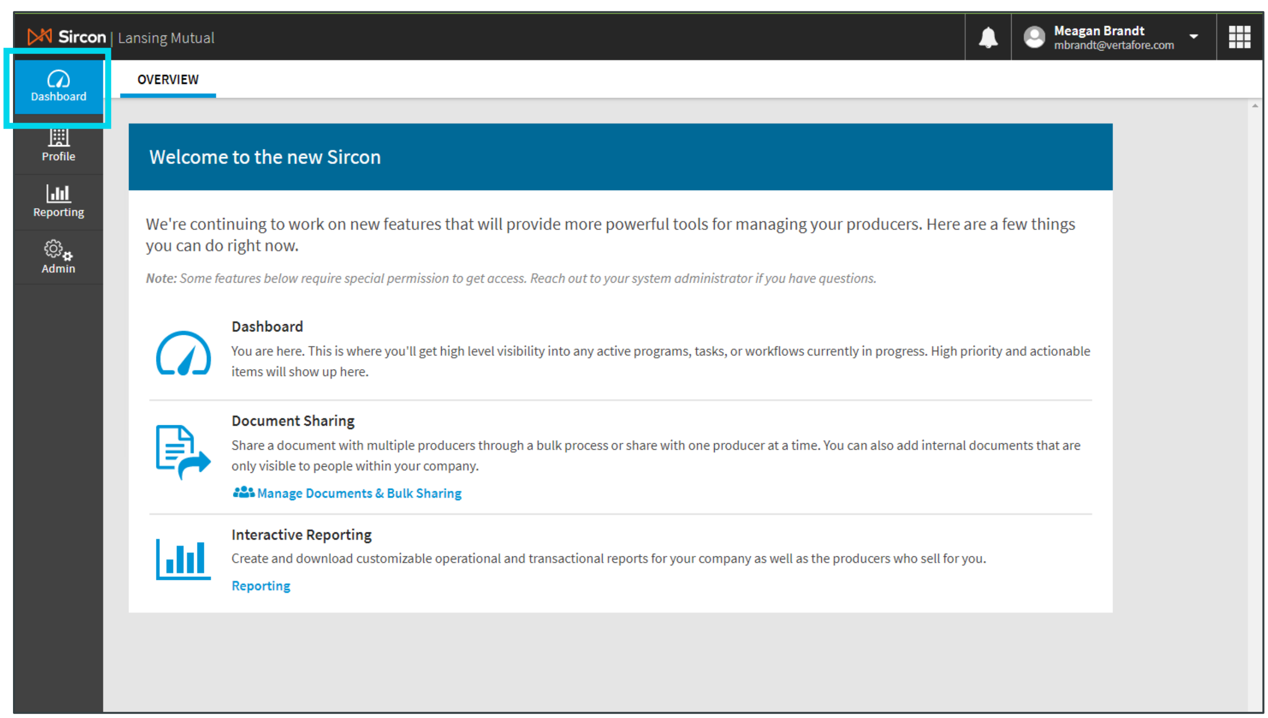
Navigation

Producer Central has a new header to make it easy to switch between the classic Producer Central views and the new Sircon view.

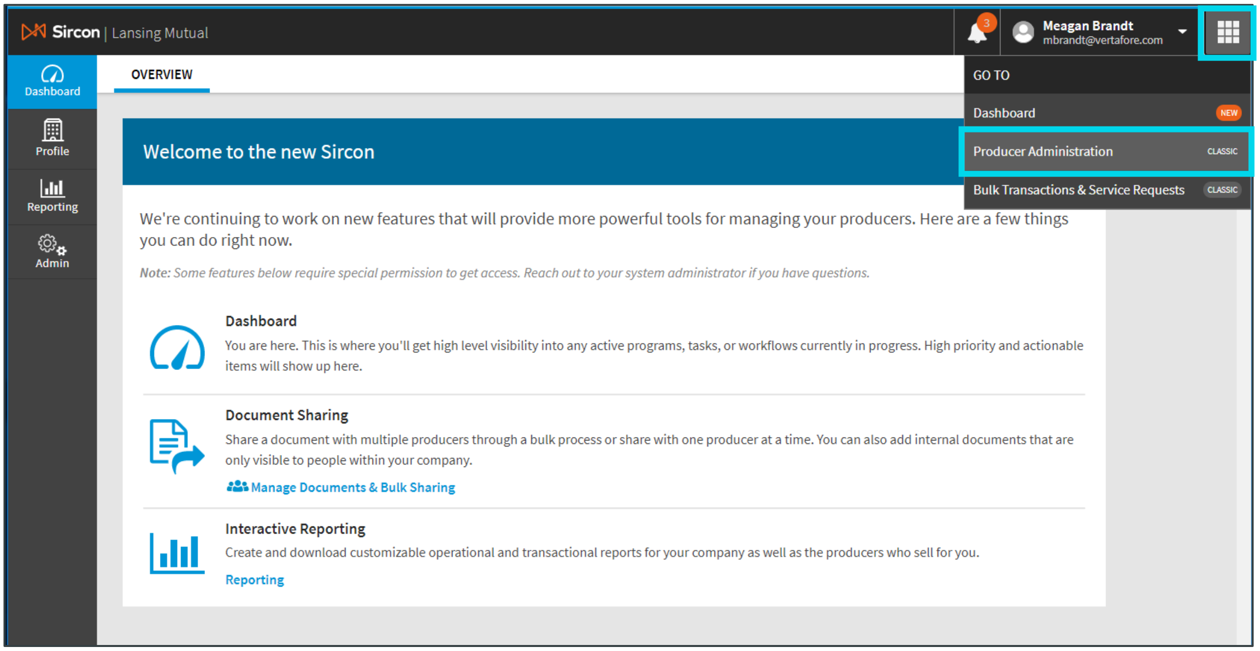
1. Use the **Application Switcher** in the upper right-hand corner to move between the classic **Producer Administration** view and the new **Dashboard** view.



2. Selecting **Dashboard** will take you to the new Sircon view.



3. When in the new view, use the same **Application Switcher** to switch back to the classic **Producer Administration** view.



Overview of the New View

The new Sircon modernizes how you access information about your producers. New features will continue to be available in this new view.

Current capabilities include:

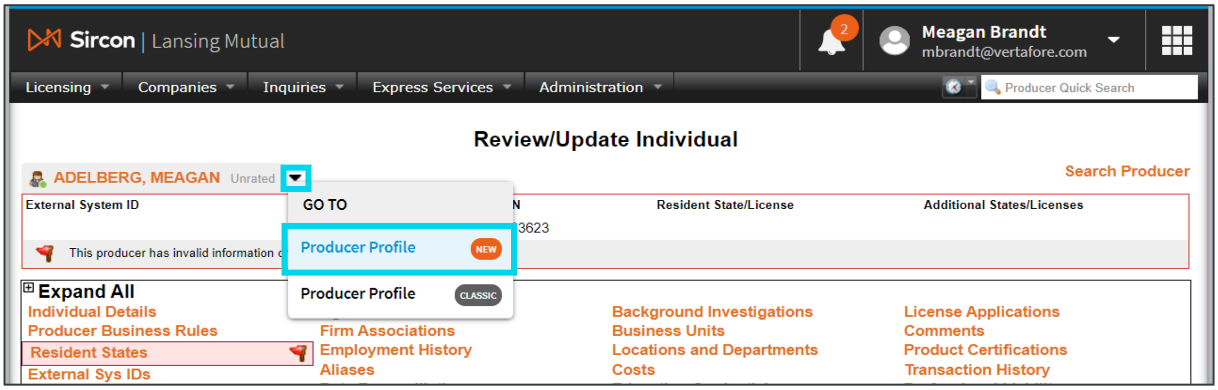
- Dashboard to get high level visibility into in progress work.
- Profile to manage your branding when communicating with your Sircon network of producers.
- Interactive Reporting to allow users to create flexible reports with custom search criteria and output.
- Administration tasks, including managing user access to new features and sharing documents with a set of producers.

> **Note**: Interactive Reporting is now accessed by using the Dashboard option. It is no longer accessible from the classic view Inquiries menu.
>
> Also note the configuration to grant user access to Interactive Reporting has moved to the Mange Users and Configure Access tabs of the Admin Menu in the new view. See Configuring User Access for more details.
>
> More information about Interactive Reporting can be found in the Interactive Reporting Quick Guide in the Printable Help Guides section of the online help.

Section: Sircon Dashboard Overview

INDIVIDUAL PRODUCER PROFILE

Additional producer information is also available in the new Sircon view. You can access the updated profile from the **Review/Update Individual** page in Producer Central. Click the arrow next to the producer's name and select **Producer Profile New**.



The producer profile view provides access to the individual's PDB licenses, all their producer appointments, and documents you have uploaded to their profile.

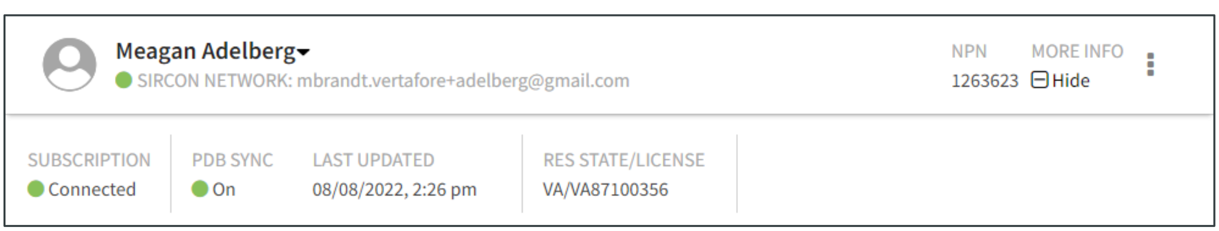
Header

The header of the profile gives a snapshot of information about the agent, including basic information such as **Name**, **NPN**, and **Resident State/License Number**. It also displays any active **External System IDs** associated with the record.

The Sircon subscription status is shown. If the subscription is active, the agent is counted towards your producer subscription count and the record has full features available to it. The header also gives a snapshot whether the agent record has daily PDB updates enabled and when was the last time new information was updated on the record. The producer profile header also includes the Sircon Network status.

The **Sircon Network Status** indicates whether this agent has a Sircon for Individuals account that is in-network or connected/linked to the Producer Central record. The email address indicates:

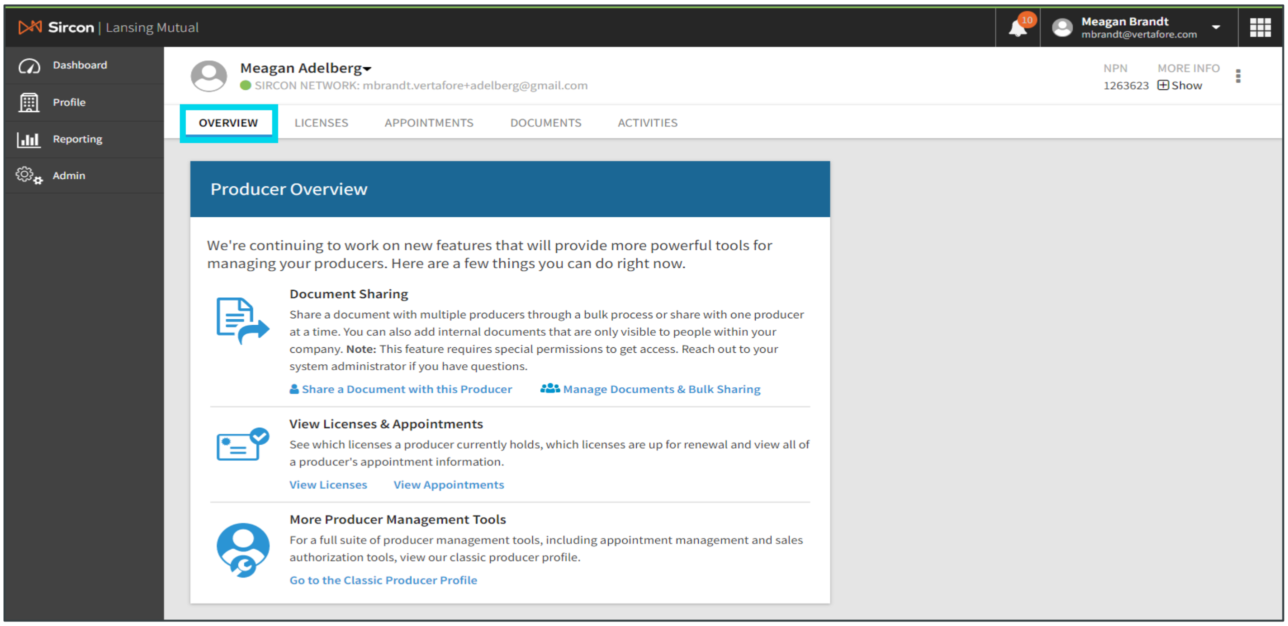
1. There is a connection between the Sircon account and the Producer Central record.
2. The email address associated with the agent's Sircon for Individuals account. If the status is "Unknown", the agent's Sircon account is not yet in your Sircon Network. The agent may already have a Sircon for Individuals account, but they are not yet participating in your network.



Section: Sircon Dashboard Overview

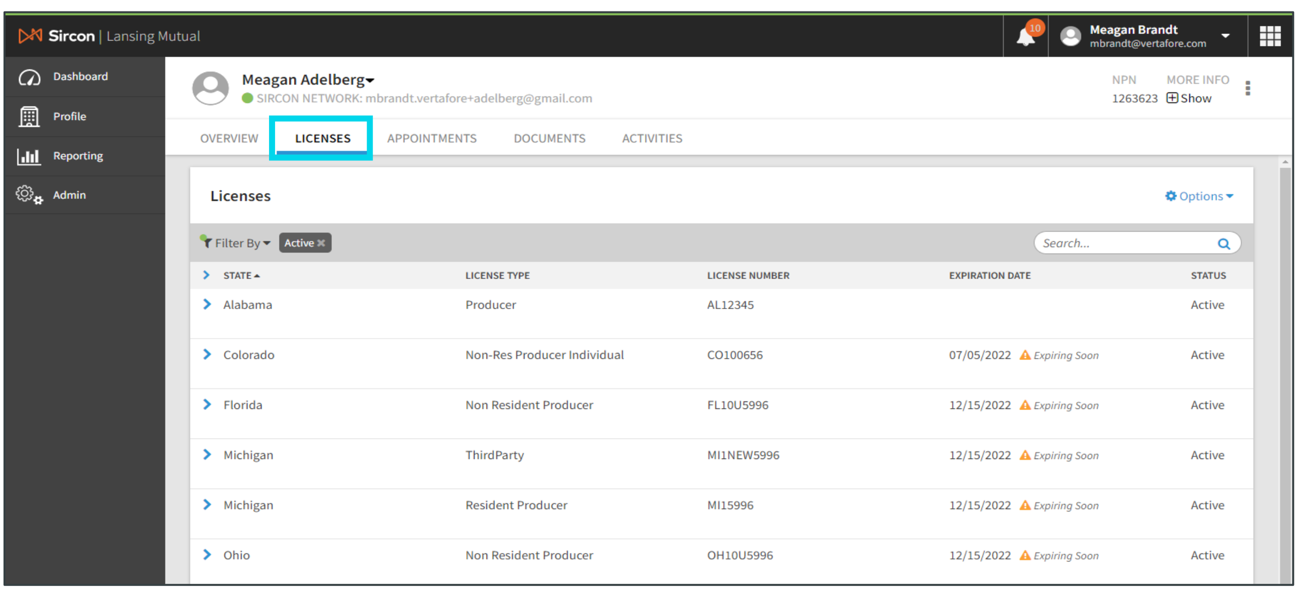
Overview

The **Overview** page describes the actions that can be done in the new producer profile, with links to the actions.



Licenses

The **Licenses** page provides license tracking for a specific producer in same way as agents see their license information as part of their Sircon account.



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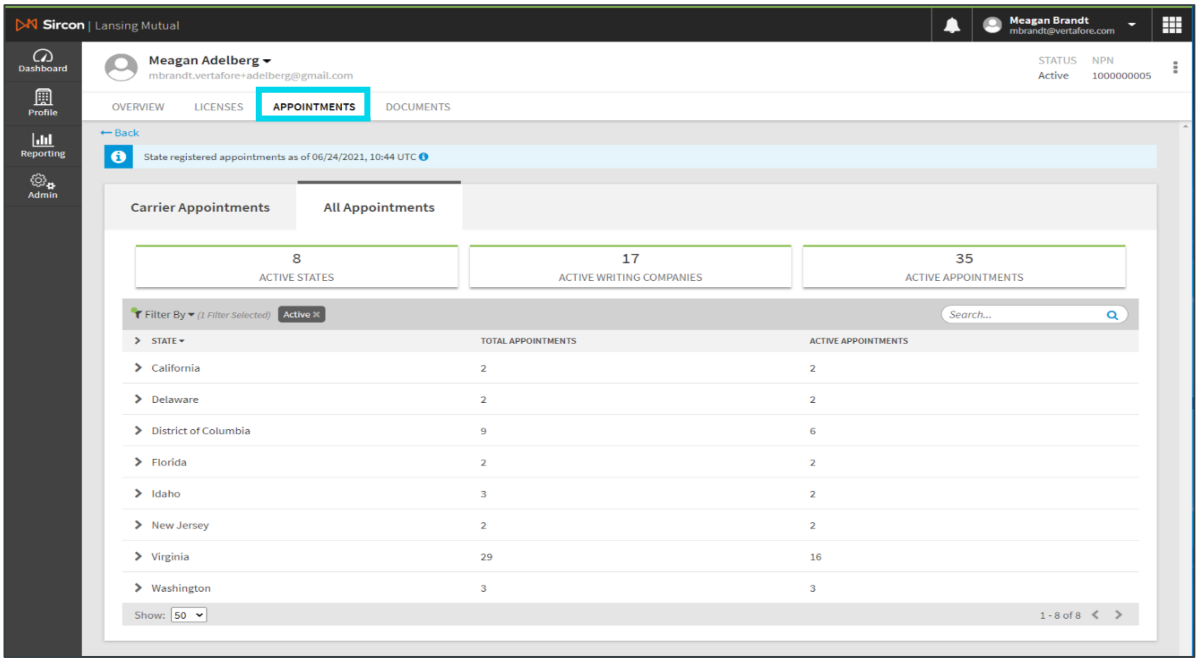
Section: Sircon Dashboard Overview

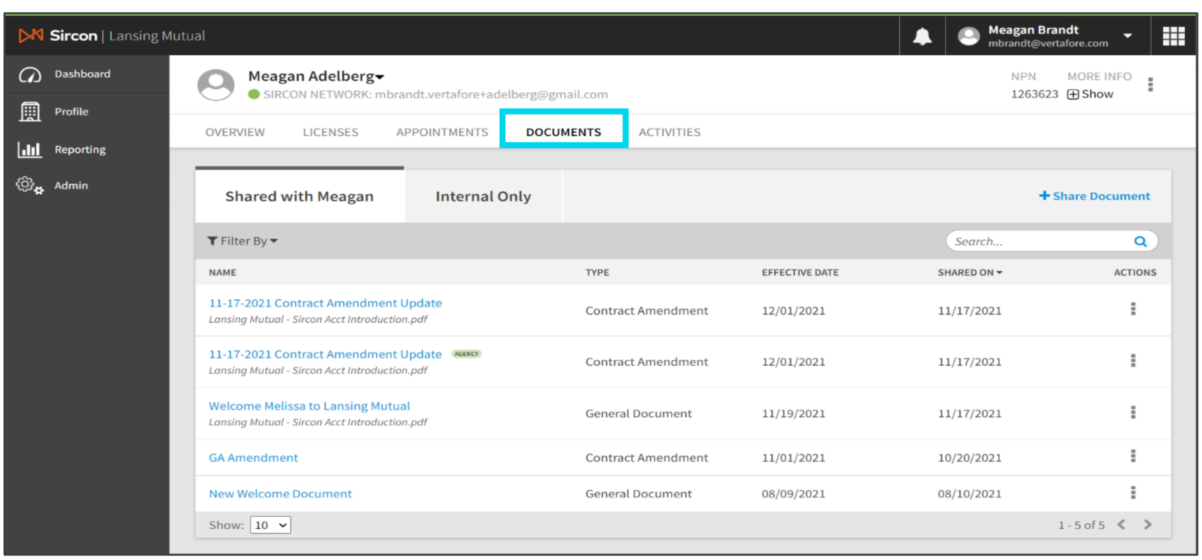
Appointments

The **Appointments** page gives a view of both proprietary and non-proprietary appointments for the producer.



Documents

The **Documents** page allows viewing documents associated with a producer, with the option to share a document directly with the agent or attach a document to their profile that is only viewable by carrier users. See Producer Documents for general information about producer documents, and see Attach a Document to a Single Producer Record for more details about sharing documents from the producer profile.

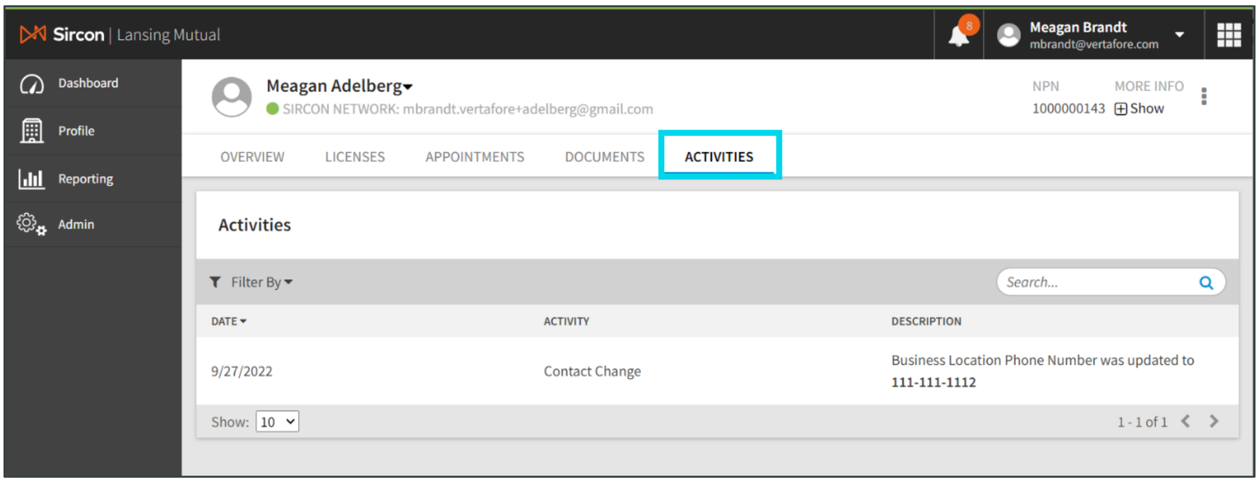


Section: Sircon Dashboard Overview

Activities

The **Activities** page shows a history of carrier-specific actions the agent did within their Sircon account. Currently this page only shows when the agent updated their carrier contact information (address, phone, or email) in their Sircon account.

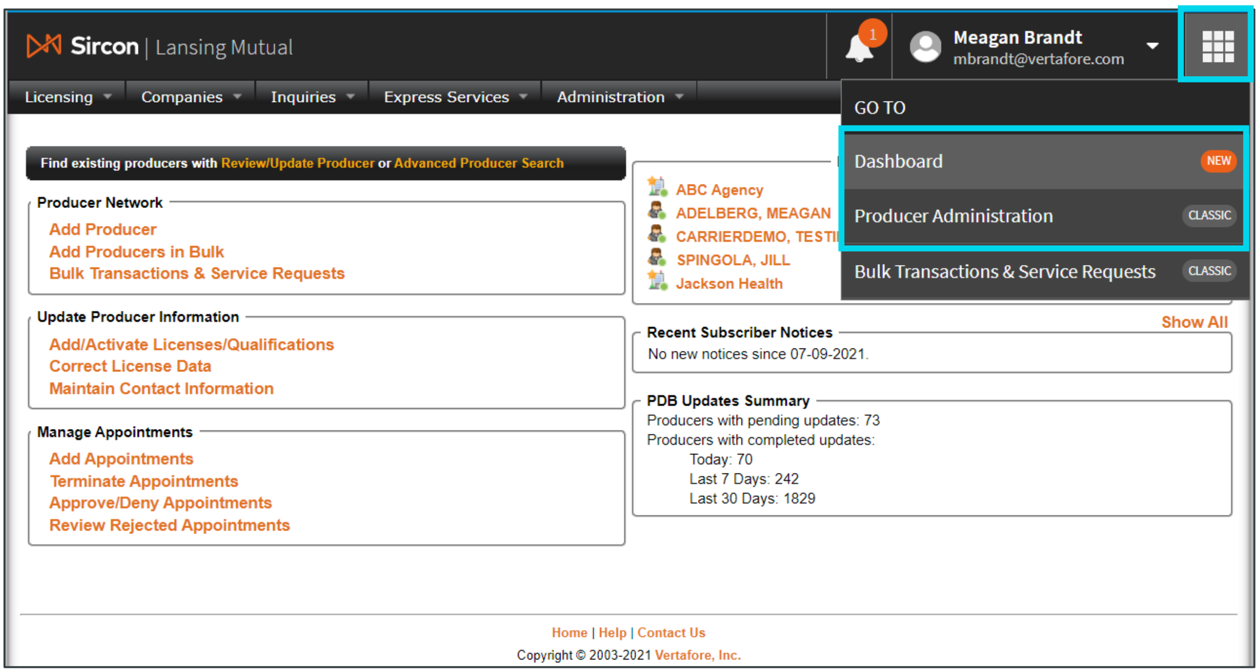
> **Note**: Allowing agents and agencies to update their carrier contact information in their Sircon account requires Onboarding & Self-Service, in addition to Producer Central.



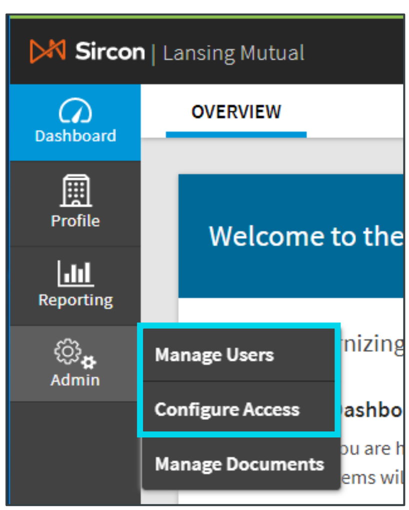
Configuring User Access for Document Sharing

Producer Central manages user access for features in the new view through the **Manage Users** and **Configure Access** pages in the **Admin** menu of the new view. User creation will continue to be done through classic **Producer Administration**.

1. To navigate to the user access controls, use the **Application Switcher** in the upper right-hand corner to move between the classic **Producer Administration** view and the new **Dashboard** view.



2. Select **Manage Users** or **Configure Access** from the **Admin** menu on the left-hand side of the screen.



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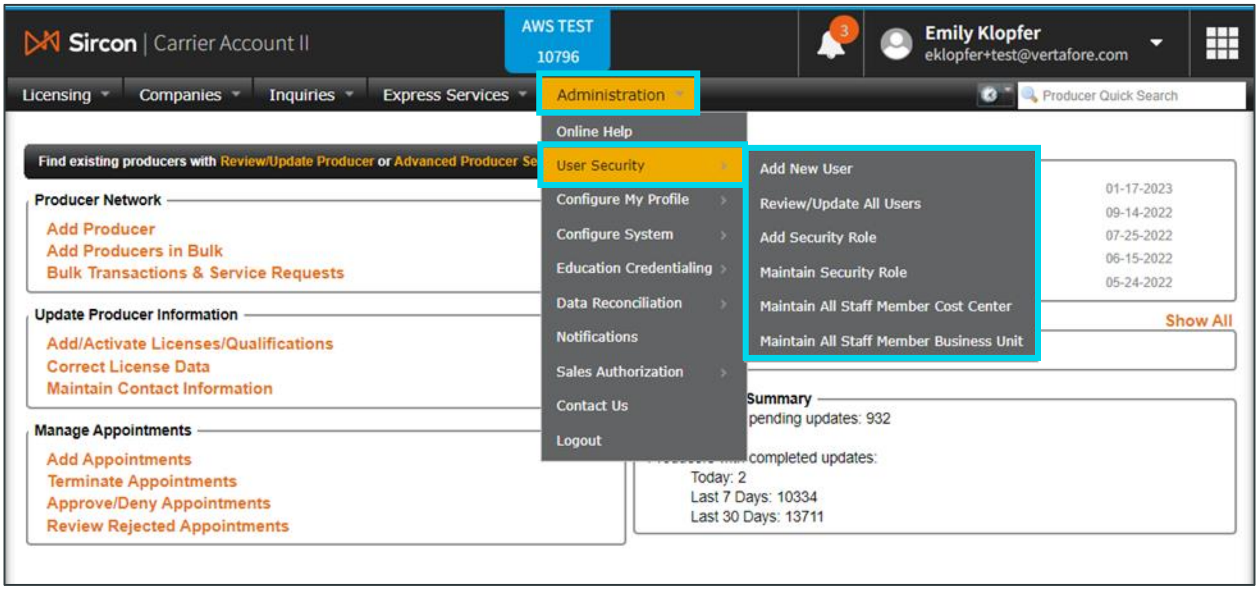
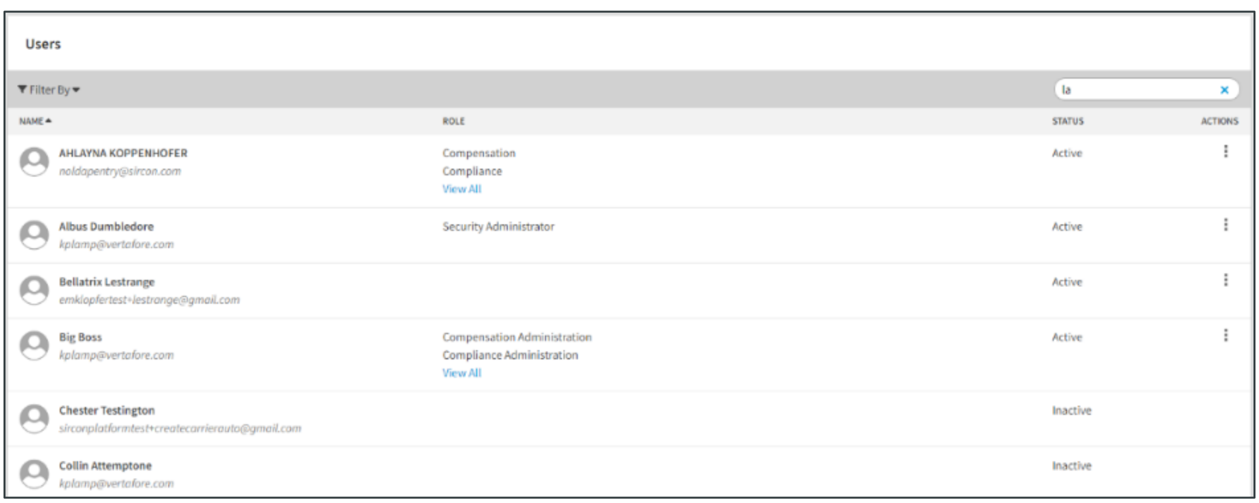
Section: Configuring User Access for Document Sharing

Creating and Managing Users and User Access

User creation and information will continue to be managed through classic Producer Administration in the **Administration >> User Security** menu.



User information is visible, but not editable, from the **Manage Users** page in the new view. This page displays a list of users which is automatically populated and kept up to date with the list of users in Producer Central. This includes the user's name, email, and status.



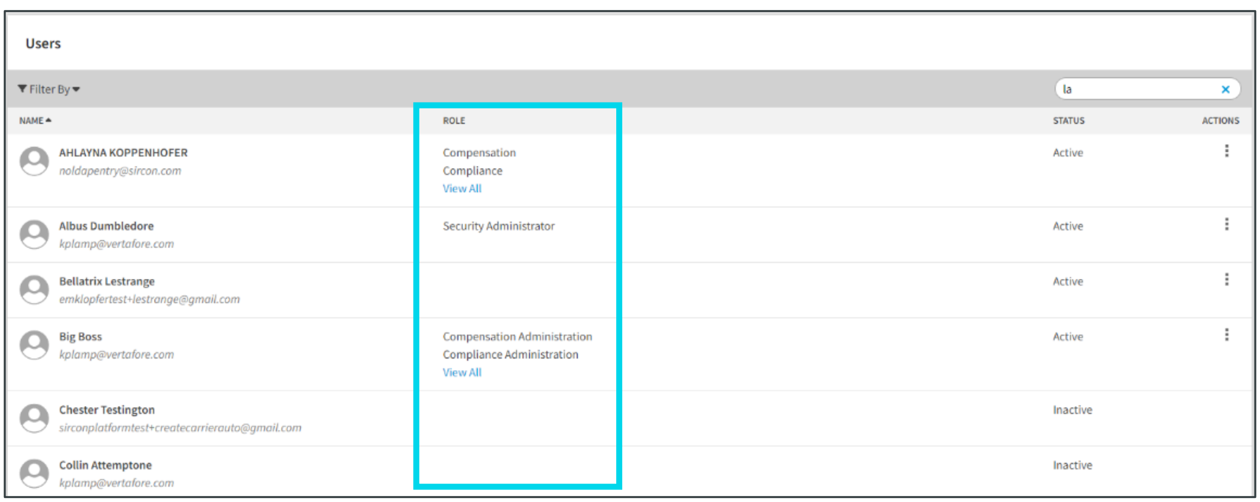
Section: Configuring User Access for Document Sharing

User Roles

There are eight standardized user roles that security administrator users can grant access to users. These are built-in roles intended to group and categorize producers flexibly to make granting access simple and efficient:

- **Security Administrator** - This role controls user security access to your account, such as adding and removing users and assigning roles. Additional Permissions cannot be added to this role as it only grants the ability to control access permissions.
- **Compliance** - This role groups users who should have access to the basic compliance features.
- **Compliance Administration** - This role groups users who should have access to configure compliance features.
- **Compensation** - This role groups users who should have access to the basic compensation features.
- **Compensation Administration** - This role groups users who should have access to configure compensation features.
- **Service Requests** - This role groups users who should have access to the basic service requests features.
- **Service Requests Administration** - This role groups users who should have access to configure service request features.
- **Vertafore Internal** - This role controls access for Vertafore staff to be able to support carrier users, such as troubleshooting issues or training.

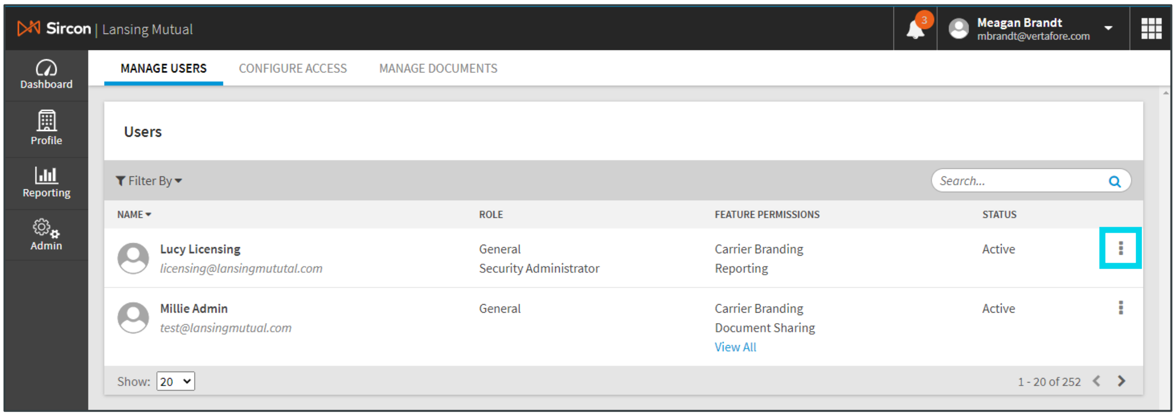
Users' roles are visible from the **Manage Users** page in the **Role** column.



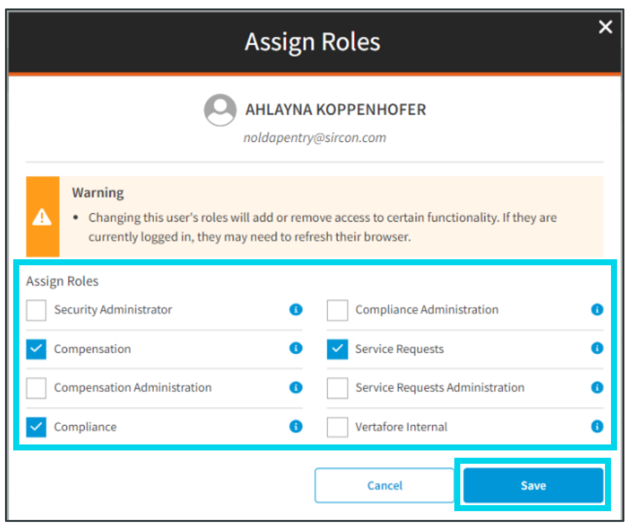
Section: Configuring User Access for Document Sharing

UPDATING A USERS' ROLES

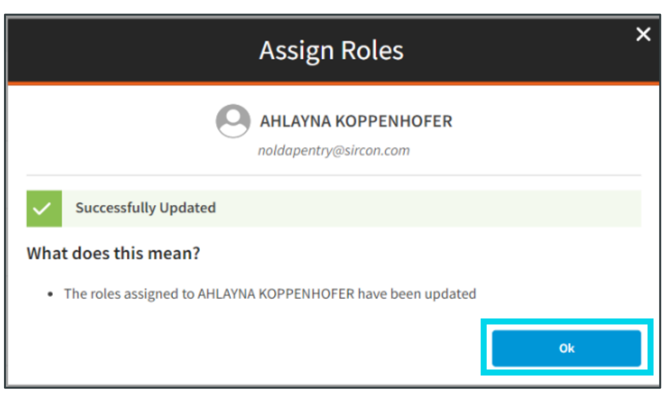
1. Click on the **three dots** on the right side of a user's row to open the **Assign Roles** option.



2. Assign roles for the user by clicking the **checkbox** next to the appropriate roles. Click **Save**.

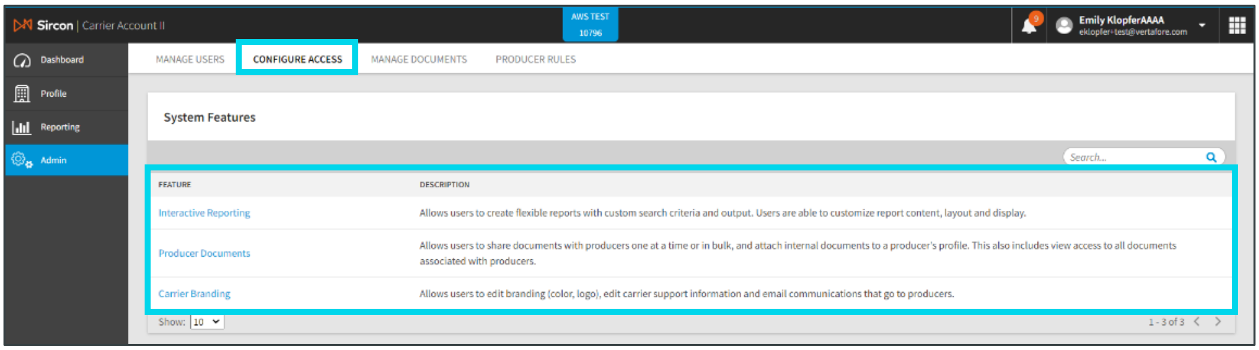


3. The verification message will be displayed. Click **Ok**.



Configuring User Access

System features control what users have access to a restricted piece of functionality. The **Configure Access >> System Features** tab lists the features that allow for user access restriction.



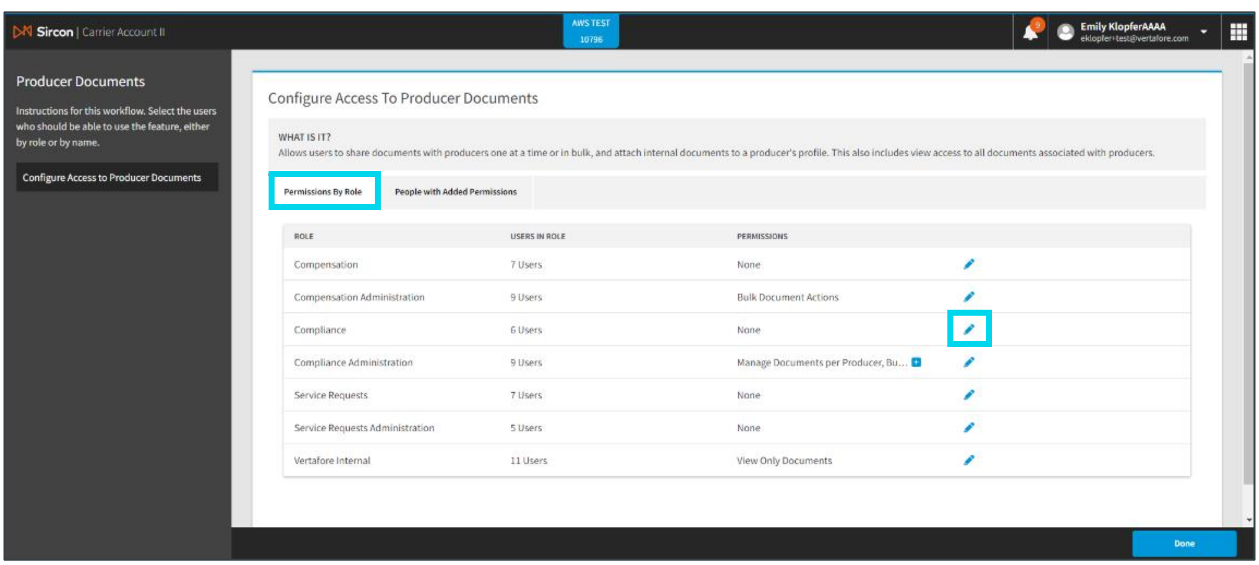
ACCESS GRANTED BY ROLE

Roles are groupings of users by a set of criteria. The **Permissions by Roles** tab has a list of roles, the number of users currently assigned that role, and the permission(s) currently granted to that role.

To grant access by role to a user two things are needed:

- The user must be given the role.
- The role must have the permission granted.

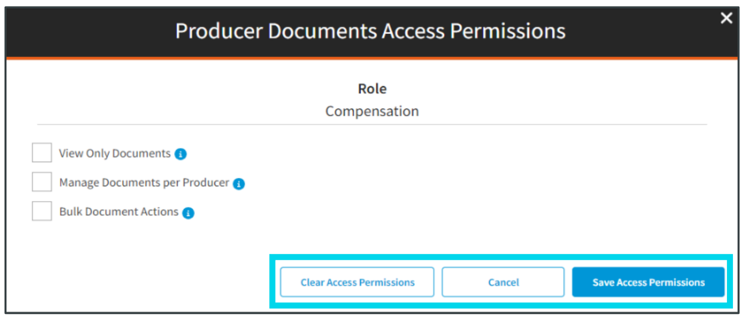
1. To give access to a role, click the **Pencil** to the right of the role in question.



Section: Configuring User Access for Document Sharing

2. This will open a dialog box which lists the options for granting permission/access. Each feature will have a different set of permissions unique to that feature.
3. Select the permissions to grant to the role and click **Save Access Permissions**. This will save the changes and return the user to the feature permission page.

> **Note**: Clicking **Clear Access Permissions** will clear out all the selected options. Clicking **Cancel** will return you to the feature permission page without saving any of the changes. This will open a dialog box which lists the options for granting permission/access. Each feature will have a different set of permissions unique to that feature.



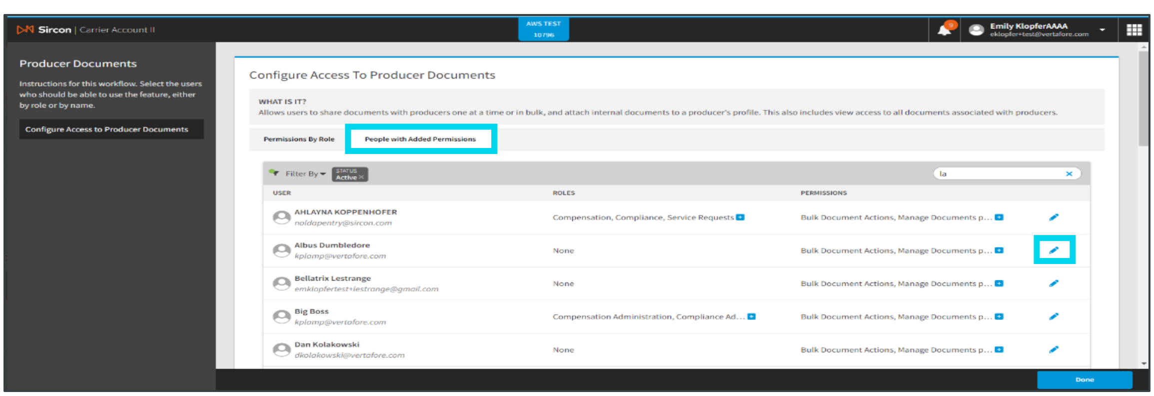
ACCESS GRANTED BY PEOPLE

The **People with Added Permissions** tab is a list of all the users in the system, their current roles, and the type(s) of access they have been granted.

From this view the **Access Types** listed reflect the access granted specifically to the user and will not be affected if they have a role which already grants that access.

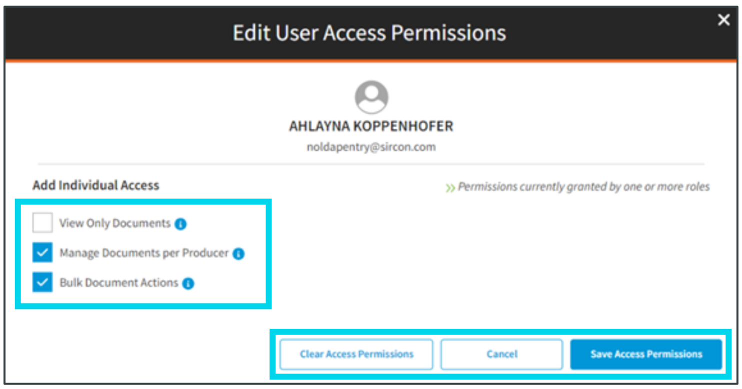
In other words, if I have a role that gives me **View Only Documents** and then also add the **View Only Documents** access types on the **People with Added Permissions** tab, if the **View Only Documents** permission is removed from the role which gave me access then I would continue to have access.

1. To give access to a specific user, click the **Pencil** to the right of the user in question.



2. This will open a dialog box which lists the options for granting permission/access. Each feature will have a different set of permission based on that feature's set of capabilities.
3. Select the permissions to grant to the role and click **Save Access Permissions**. This will save the changes and return the user to the feature permission page.

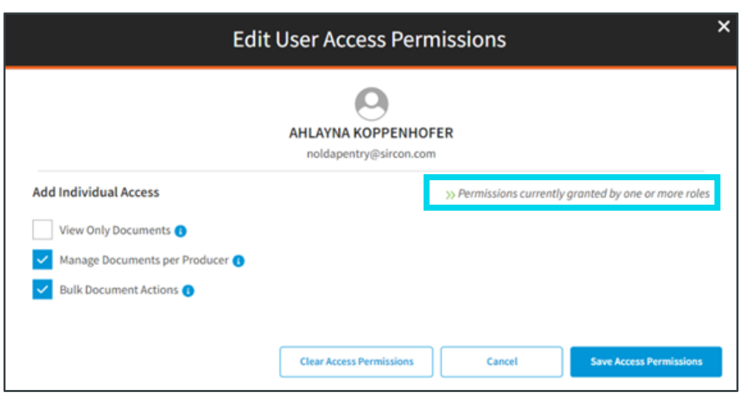
Note: Clicking **Clear Access Permissions** will clear out all the selected options. Clicking **Cancel** will return you to the feature permission page without saving any of the changes.



Note: There is an additional **>> Permission currently granted by one or more roles** indicator.

Any permissions/access with this indicator (">>") next to it has already been granted by one or more roles assigned the user.

Assigning it here will mean if the roles granting access are removed then the user will retain access.



Section: Carrier Communications and Branding

Carrier Communications and Branding

As part of the Sircon network, you can connect and share information with your agents via their Sircon accounts. Many of these interactions will send an email to agent Sircon accounts, for example document sharing.

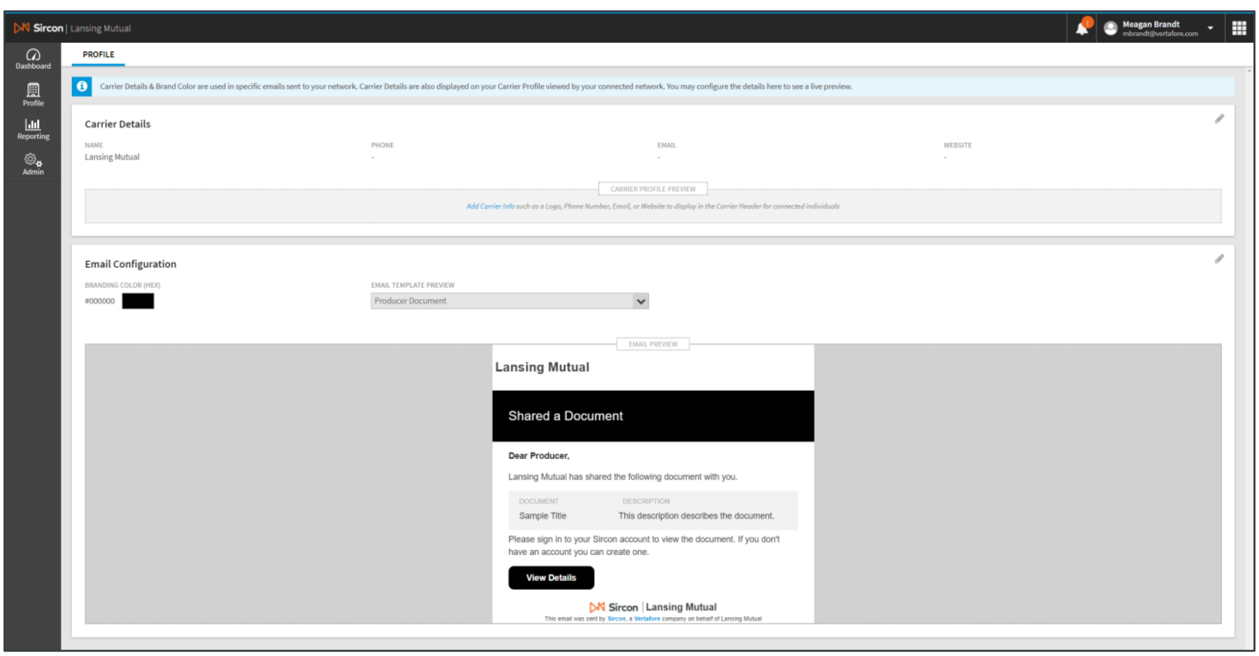
By default, any Sircon network email sent from you to your producers will display the standard Sircon look and feel. These notifications can be configured to highlight your carrier brand, including information for contacting the agent help desk to ensure agents can get the help they need.

Carrier Profile Configuration

1. From the new Sircon Producer Central dashboard, select **Profile** from the left-hand navigation.

> **Note**: To access the **Profile** option, you need the Carrier Branding access. See Configure User Access for more information.

2. The carrier profile page displays your current configuration, including previews of how the information will appear to your producers.



The carrier profile configuration applies to the following carrier to agent emails:

- Document Sharing
- Onboarding using Sircon accounts
- Onboarding notifications of more information

Section: Carrier Communications and Branding

> **Note**: Sircon Onboarding may have more notifications than what are listed above. Please reach out to your account manager or customer service representative if onboarding notification changes are needed.

CARRIER DETAILS

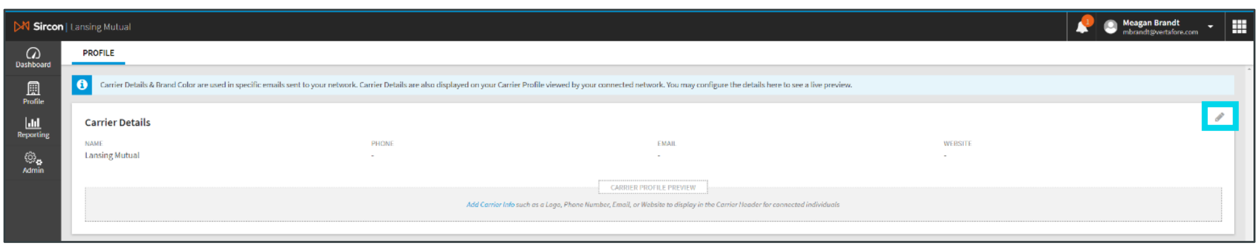
The **Carrier Details** section allows you to view and update the following information as it is displayed to your producers:

- Name
- Contact phone number
- Contact email address
- Contact web site
- Logo

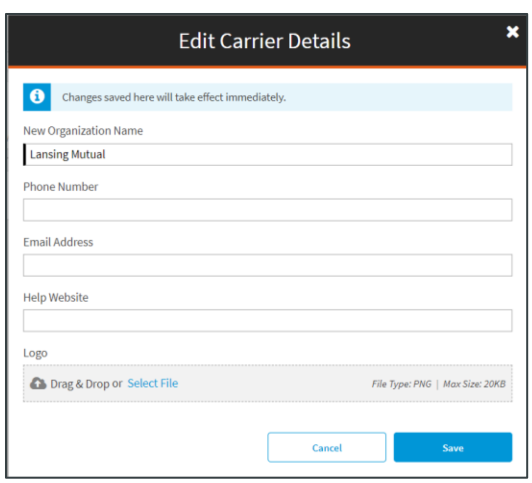
This information is displayed in multiple places for your producers:

- Carrier to agent email notifications
- Carrier profile in producer Sircon accounts
- Carrier name is also displayed in the Producer Central header

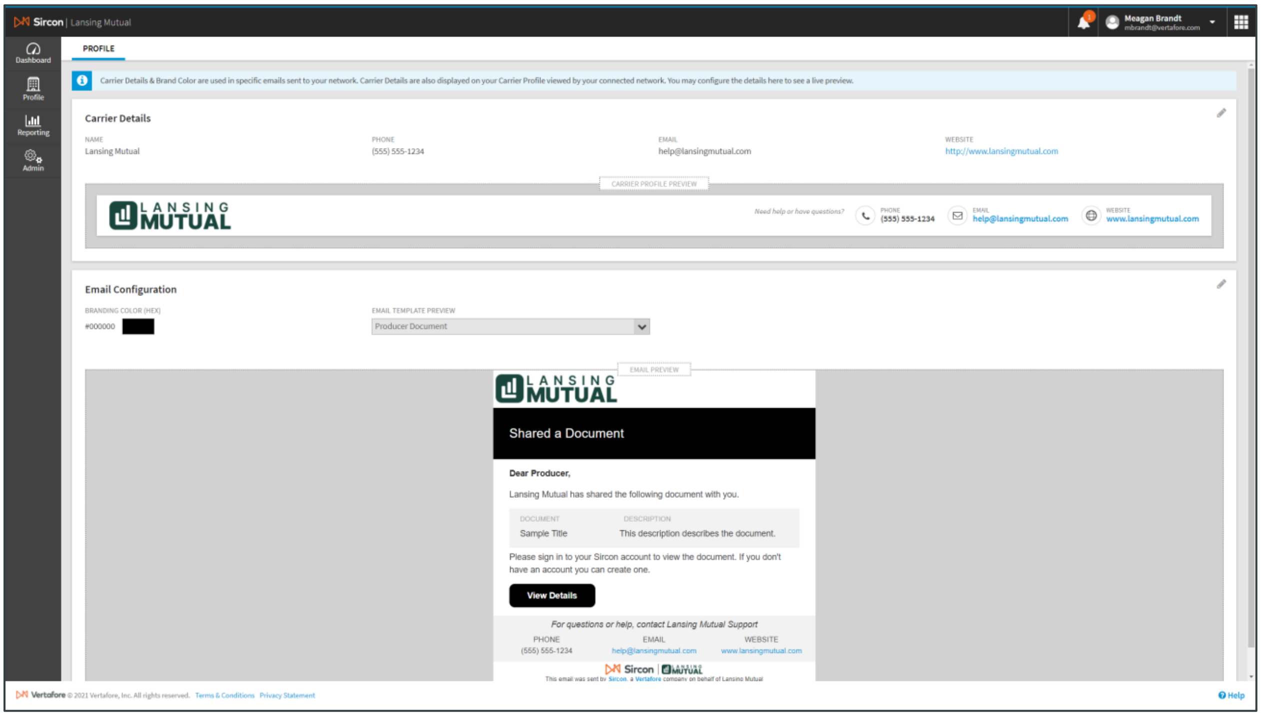
1. To edit this information, click the **Pencil** icon in the Carrier Details section.



2. Fill out the new information you want to appear. You can add your **New Organization Name**, **Phone Number**, **Email Address**, **Help Website**, and **Logo**.
3. Click **Save**.



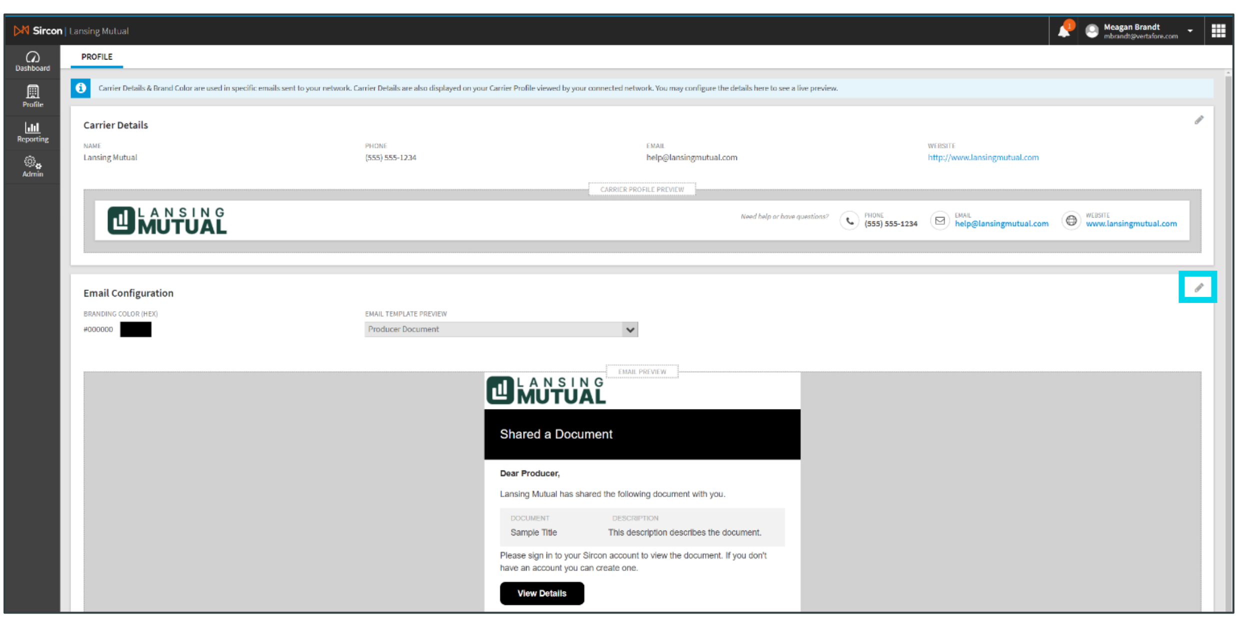
4. Changes take effect immediately and the header and email previews are updated.



EMAIL CONFIGURATION

In addition to including the logo and contact information, email notifications can be further configured to display a custom color in the header and on the action button.

1. To edit the color, click the **Pencil** icon in the **Email Configuration** section.



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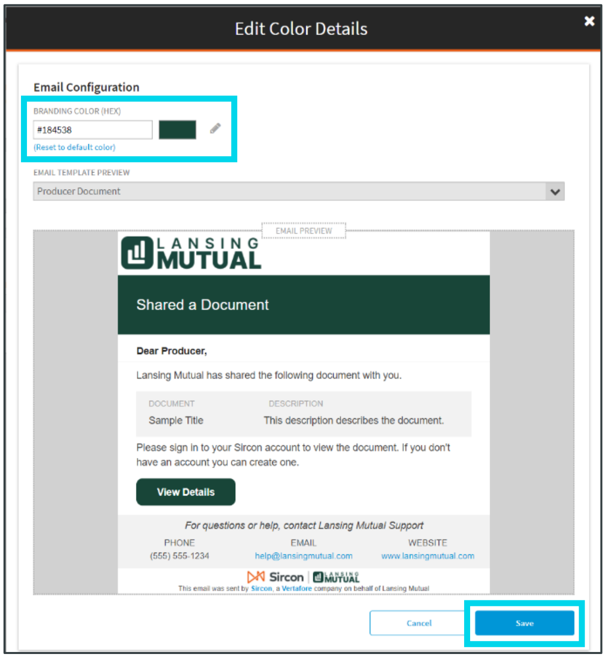
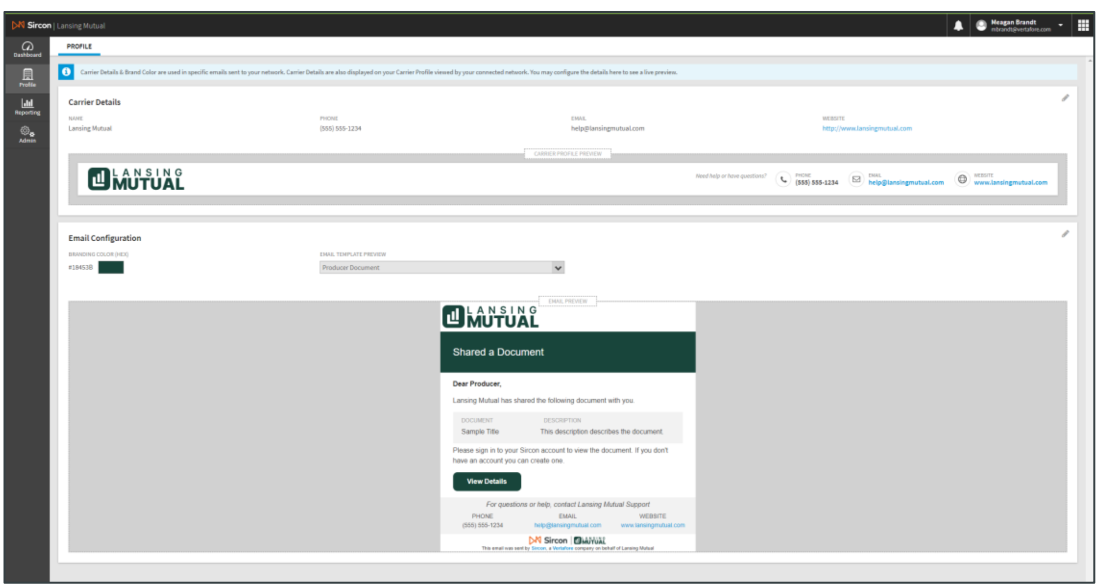
Section: Carrier Communications and Branding

2. You can either enter in the **Branding Color (Hex)** value of the color or click the **Pencil** icon to open the color swatch to pick a color.
3. Click **Save**.



4. The change will take effect immediately and the email preview is updated.

> **Note**: When testing capabilities in UAT, a whitelist can be configured to control which email addresses or email domains can receive notifications. Please contact your customer support representative for more information.



Producer Documents

With Producer Documents, users can attach PDF documents to a producer record in Sircon Producer Central, making it easier than ever to get a complete, centralized view of your producer data.

Users can invite one or many agents to review the centralized view of producer data by sharing an attached PDF document. Each connected agent becomes one of the more than 1 million+ that have a Sircon account, providing upgraded access to see their own licenses, get license renewal reminders, and review carrier-specific data that have been made available to them.

Example Uses of Producer Documents

Producer documents can be used anytime you wish to communicate information to an agent or just to ensure you have single place to store important documents related to the producer.

Example uses include:
- Commission schedule initial publication and ongoing updates
- Contract amendments
- General producer information, such as help desk procedures
- Basic onboarding by sharing the producer information form with an agent
- Onboarding status notifications, such as welcome letters and ready to sell letters
- Store other documents related to the producer on their record that are carrier use only
- Invite a set of agents to get connected via Sircon accounts

Getting Started with Producer Documents

To start using Producer Documents, you will need the following:
- Access to Producer Central
- An understanding of how to navigate to the new Sircon view
- Access to the Producer Documents feature
- A document to upload
- Single agent or set of agents who need the document
- Configured communications information and branding (optional)

> Contact your Vertafore Account Manager for more information about upgrading to Producer Central.
>
> See Getting Familiar with the New Sircon Look & Feel for more information about navigating to the new view.

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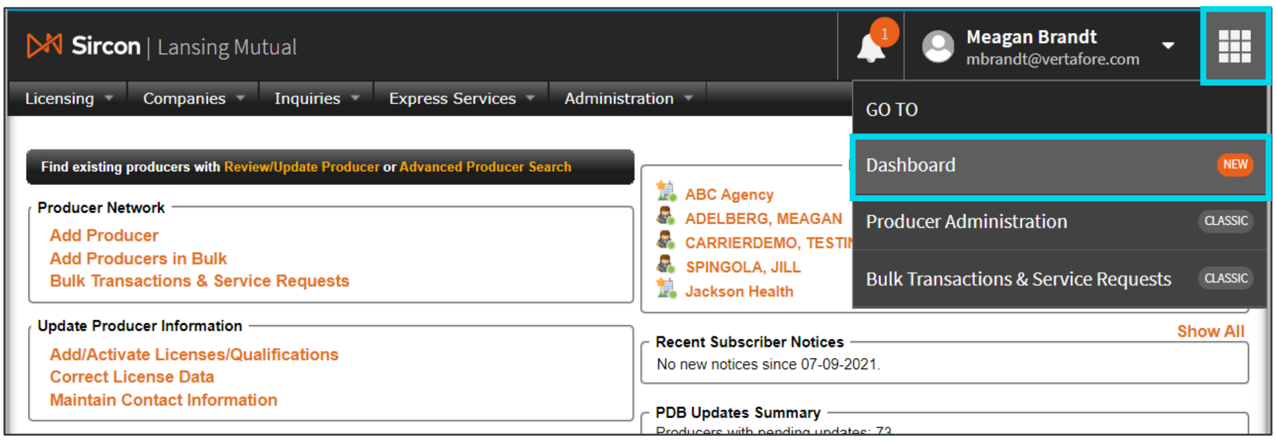
Section: Producer Documents

Configure User Access to Producer Documents

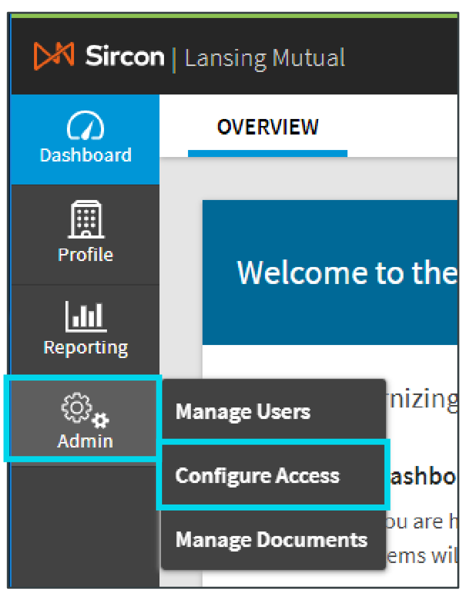
Certain new features, such as Producer Documents, require a security administrator to enable it for users who should have access. For more information about the security administrator role and configuring user access, please see Configure User Access.

The user access configuration is in the new view of Producer Central.

1. Use the Application Switcher in the upper right-hand corner to move between the classic Producer Administration view and the new **Dashboard** view.

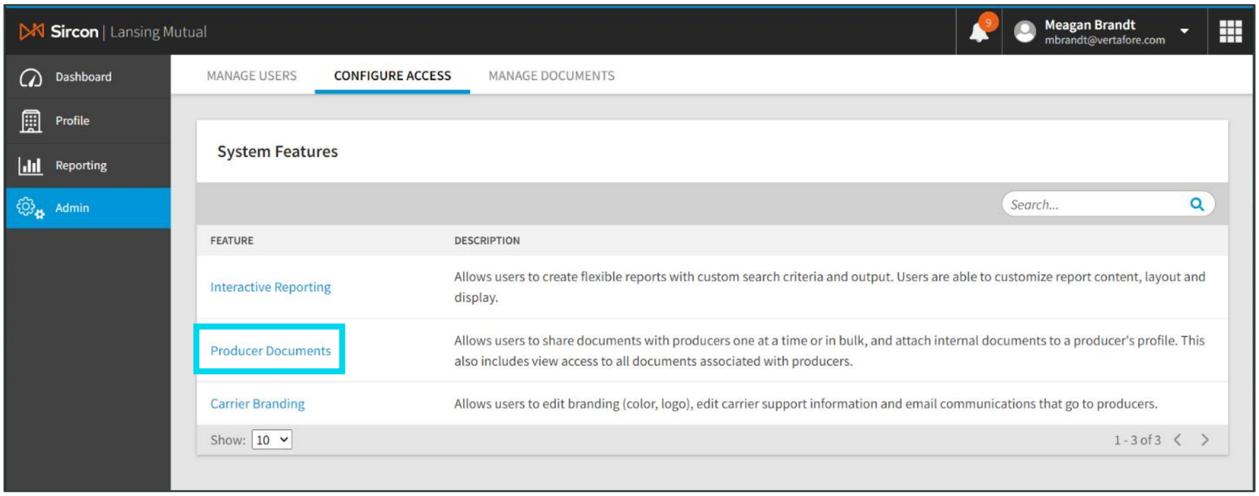


2. To enable access to Producer Documents, a user with the security administrator role will do the following within the new view. Select **Configure Access** from the **Admin** menu on the left-hand side of the screen.



Section: Producer Documents

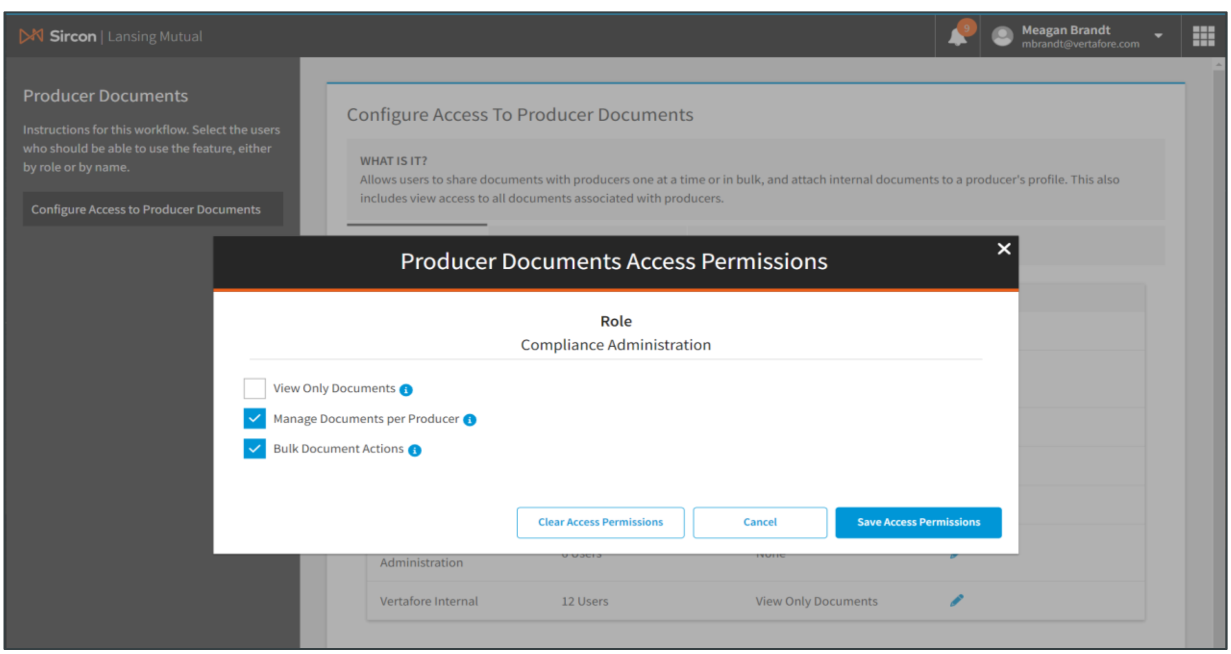
3. Locate the **Producer Documents** feature in the table. It will tell you the current access level and how many users have access to the feature.
4. Click **Producer Documents** to change the access.



CONFIGURATION OPTIONS

Configuration consoles control which users have access to a restricted piece of functionality. The configuration console lets you control which roles or specific users have access to the feature. See Configuring User Access for more details about when to configure access by role vs. people.

1. Locate the role or user who needs access then click the **Pencil**.
2. Update the access then click **Save Access Permissions** to confirm updates.



Section: Producer Documents

PRODUCER DOCUMENTS ACCESS PERMISSIONS

There are three access options for producer documents:

- **View Only Documents** – Allows user to view documents, but prevents sharing, revoking, and attaching internal documents.
- **Manage Documents per Producer** – Allows user to view and manage documents on a producer record. Includes sharing, revoking, and attaching internal documents for a specific producer.
- **Bulk Document Actions** – Allows user to manage a document with multiple producers at once. Includes sharing and revoking documents in bulk.

Both the **Manage Documents per Producer** and **Bulk Document Actions** permissions allow users to view documents. If they are enabled for a user, you do not need to enable **View Only Documents**.

The **View Only Documents** permission should only be selected for users who should not have the ability to manage or share documents but do need to view documents.

If all three options are enabled for a user, the user will have full producer documents capabilities.

Ways to Manage Producer Documents

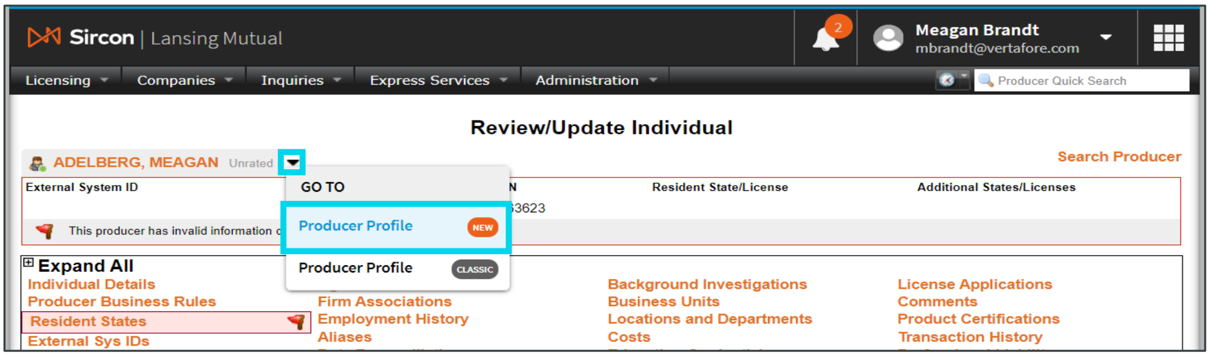
There are multiple ways to track producer documents within Producer Central. You can:

- Attach and share a PDF document with a single agent from their producer record
- Attach a PDF document that is only available in Producer Central and not accessible by the agent
- Attach and share a PDF document with more than one agent

> **Note**: Currently document management is only available for individual producer records. Document management for agency producer records is coming soon.

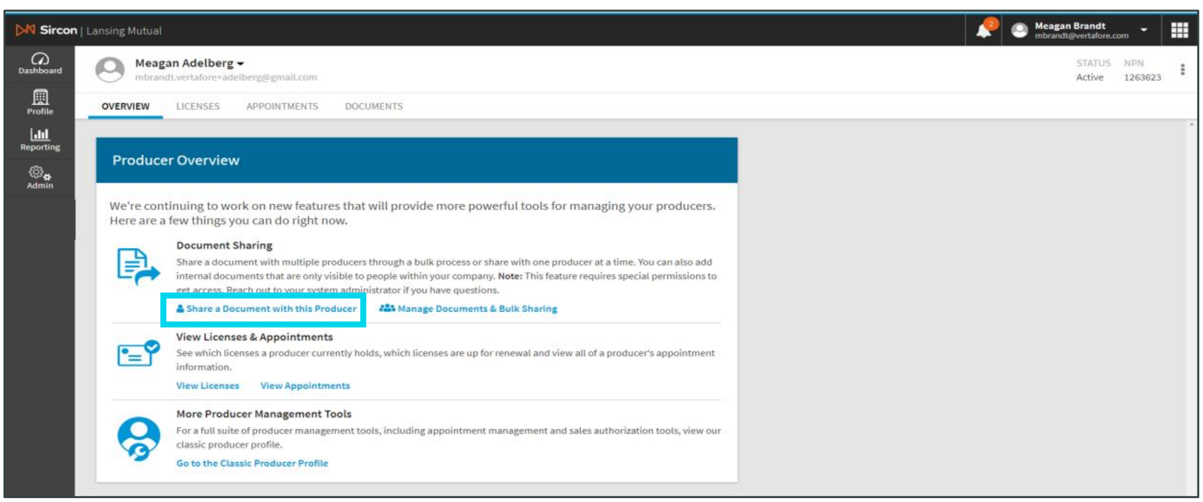
Attach a Document to a Single Producer Record

1. To share a document with a specific producer, navigate to the producer's Sircon profile. You can access the updated profile from the **Review/Update Individual** page in Producer Central.
2. Click the arrow next to the agent's name and select **Producer Profile (New).**



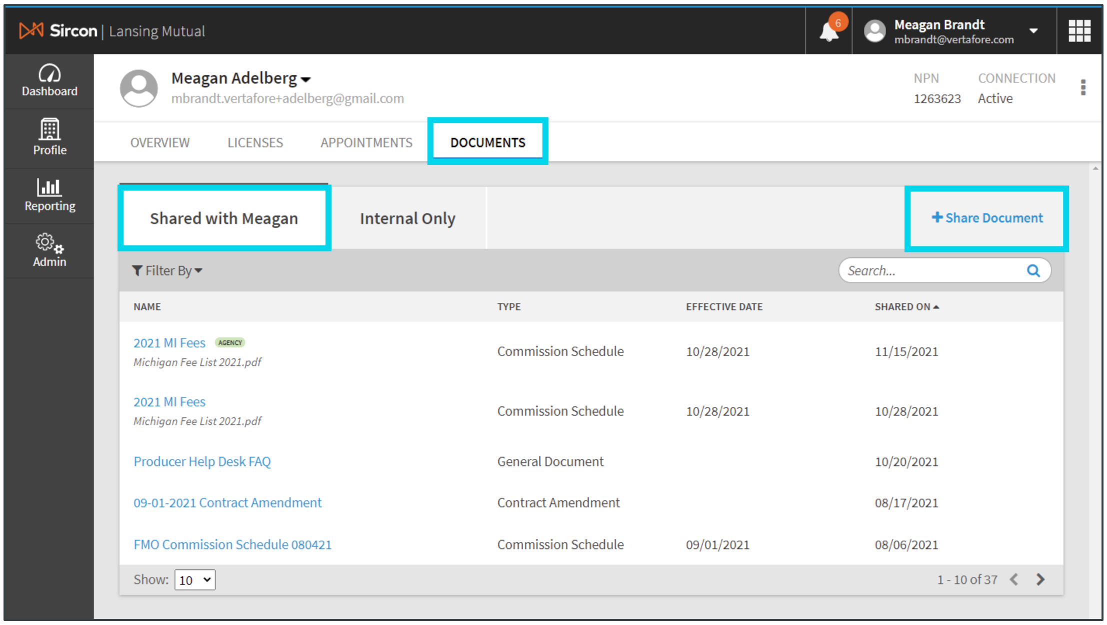
Once in the producer profile, you can start sharing in any of the following ways:

- From the **Overview** page, click **Share a Document with this Producer**.

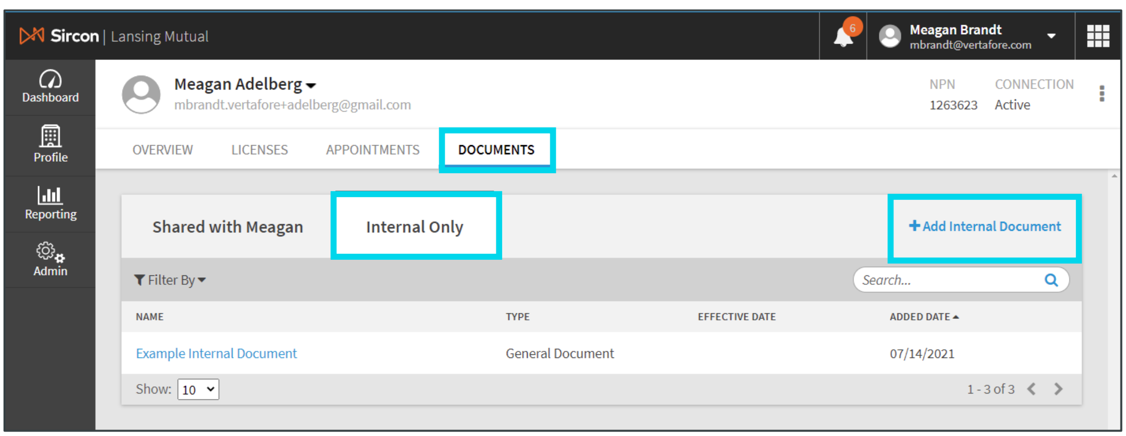


- Go to the **Documents** page and select the **Shared with ProducerName** tab, and click **Share Document**.

Section: Attach a Document to a Single Producer Record



- Go to the **Documents** page and select the **Internal Only** tab and click **Add an Internal Document**.

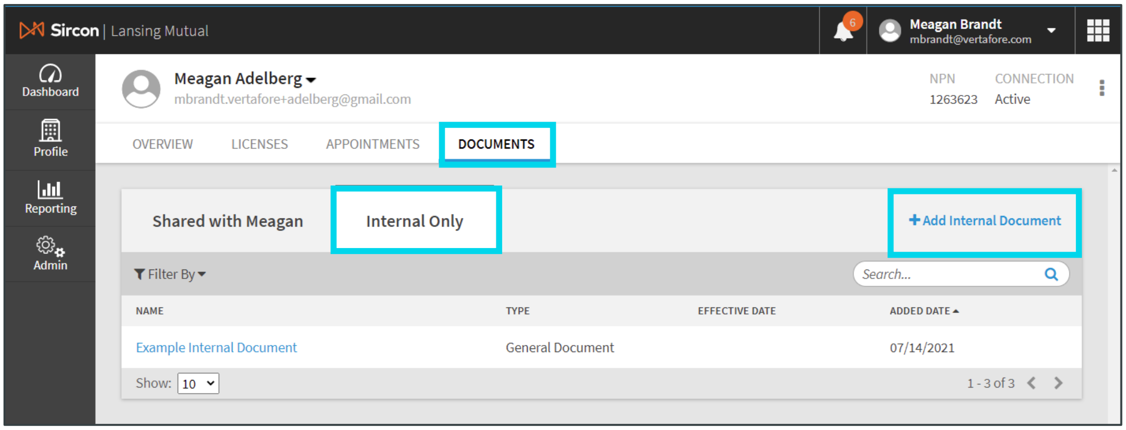


Section: Attach a Document to a Single Producer Record

Internal Document

Use the **Internal Only** tab if you have a document you want to associate with the producer's record, but don't want to make it directly available to that agent.

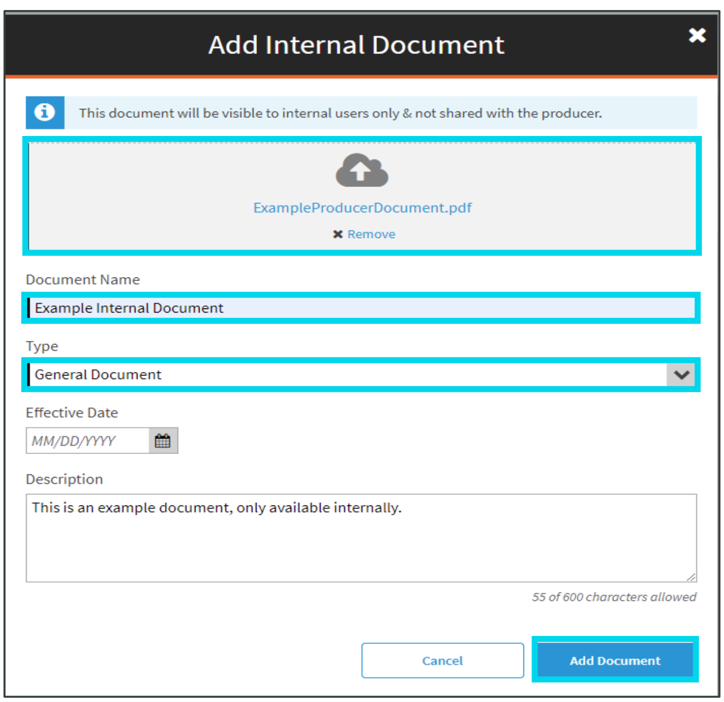
1. To upload a document, click **Add Internal Document**.



2. Specify a PDF file using a drag and drop method or select it from the file system.

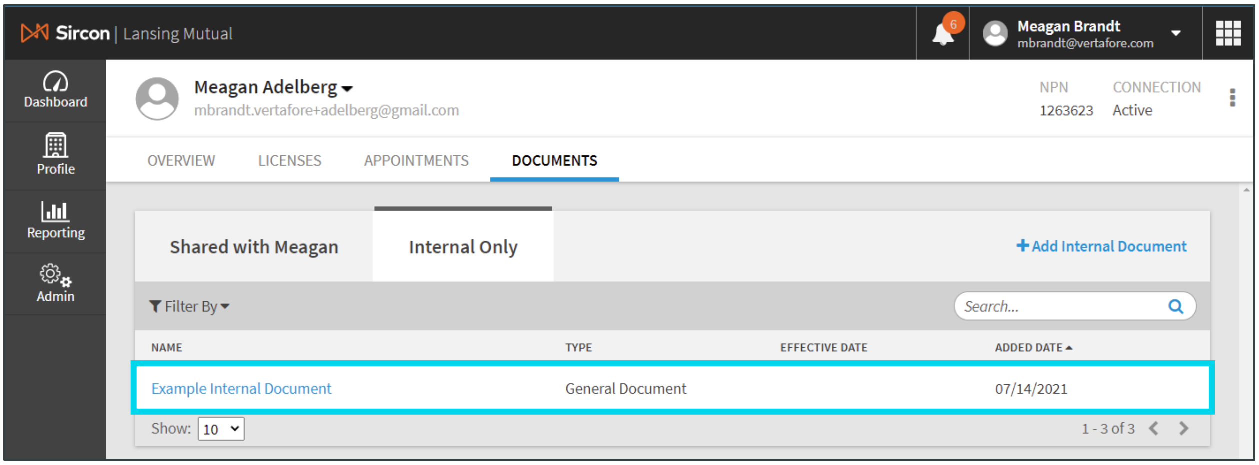
> **Note**: The PDF document file size cannot exceed 20MB.

3. Provide additional information about the document, including a descriptive **Name**, **Type**, optional **Effective Date**, and optional **Description**. This additional data is intended to help you keep track of the different internal documents.
4. Click **Add Document**.

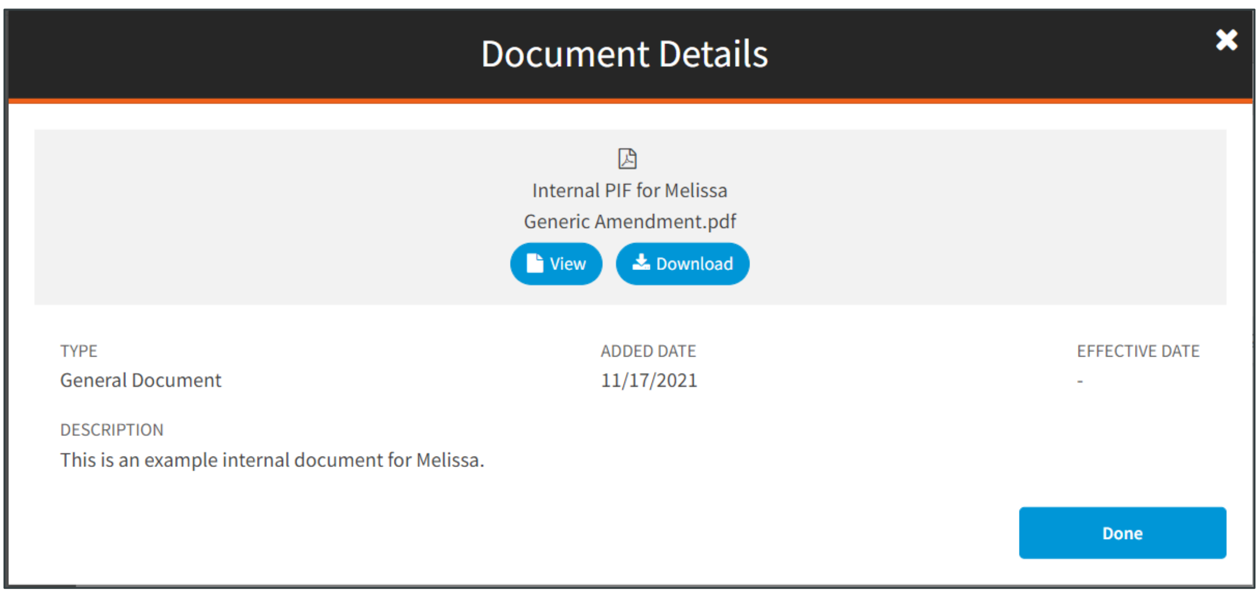


Section: Attach a Document to a Single Producer Record

5. Once uploaded, the document will appear in the **Internal Only** list.
6. To view the details, including the PDF file, click the **Document Name**.



7. You can now see the document details.

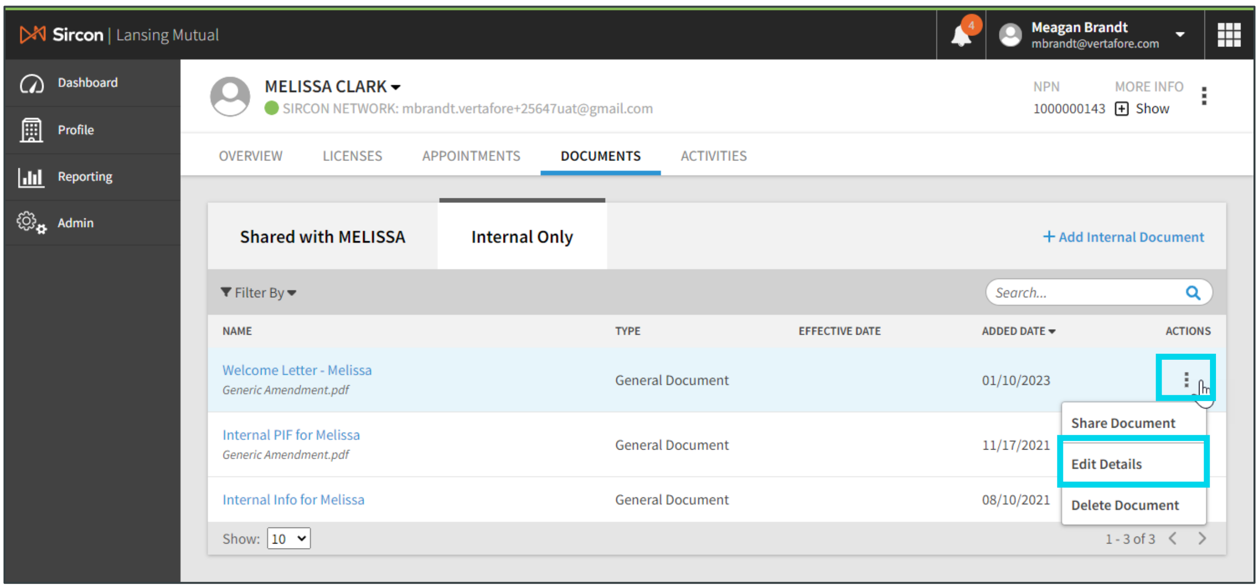


Section: Attach a Document to a Single Producer Record

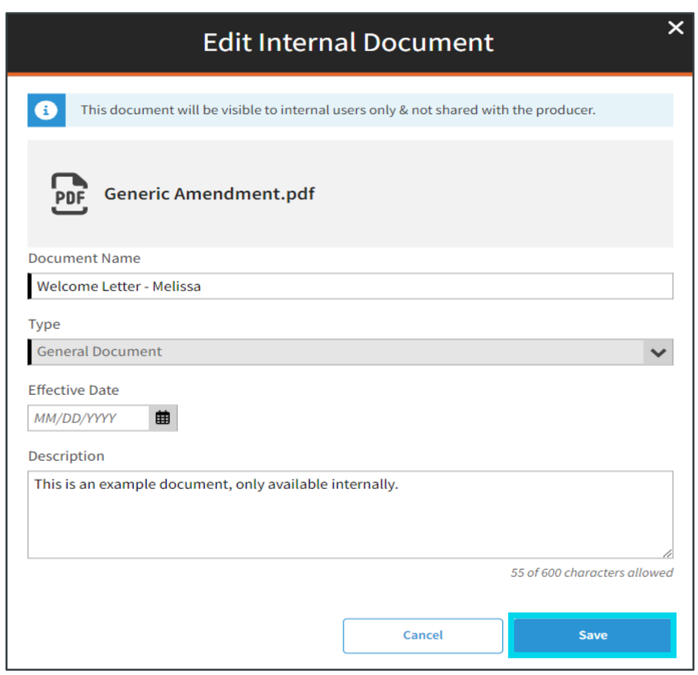
EDIT AN INTERNAL DOCUMENT

You can edit the name, effective date, and description, in case you made a mistake when you initially added the document or missed some information you want to add later.

1. To edit an internal document, click the … button next to the document you need to modify from **Internal Only** tabs.
2. Click Edit Document.



3. Update the document details then click **Save**.



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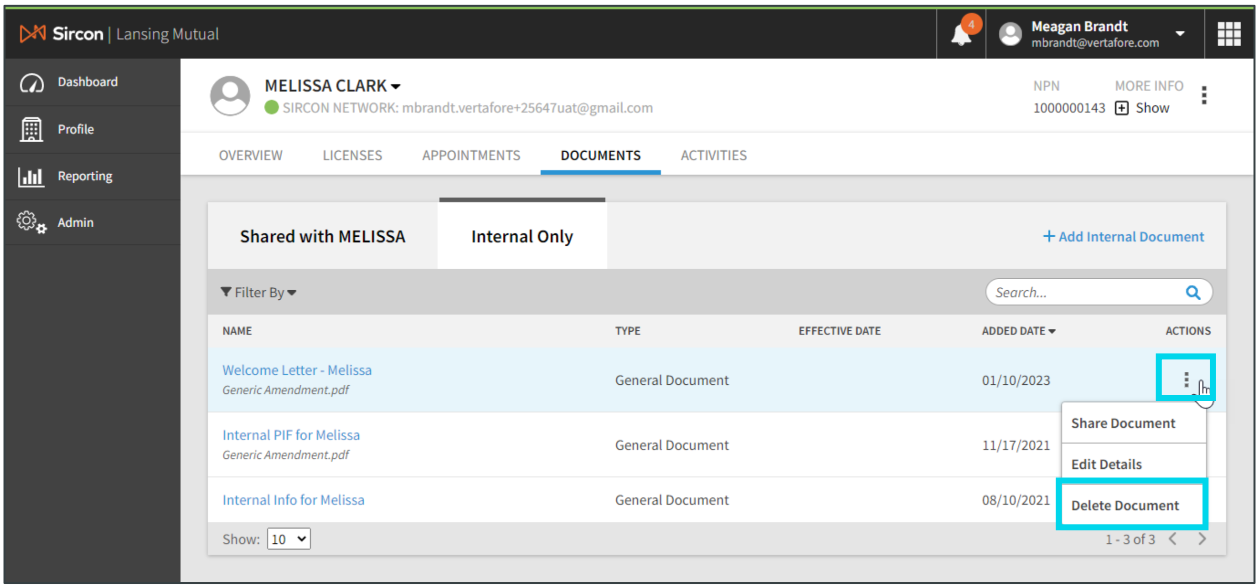
Section: Attach a Document to a Single Producer Record

DELETE AN INTERNAL DOCUMENT

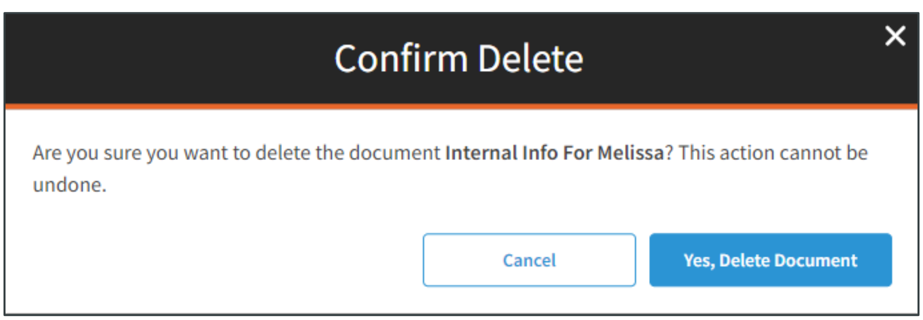
You can also delete an internal document if it is no longer needed.

1. To delete an internal document, click the **…** button next to the document you need to modify from **Internal Only** tabs.

2. Click **Delete Document**.



3. You will be asked to confirm if you want to delete the document. This action cannot be undone. Click **Yes, Delete Document** or **Cancel** to return to the Internal Only tab.

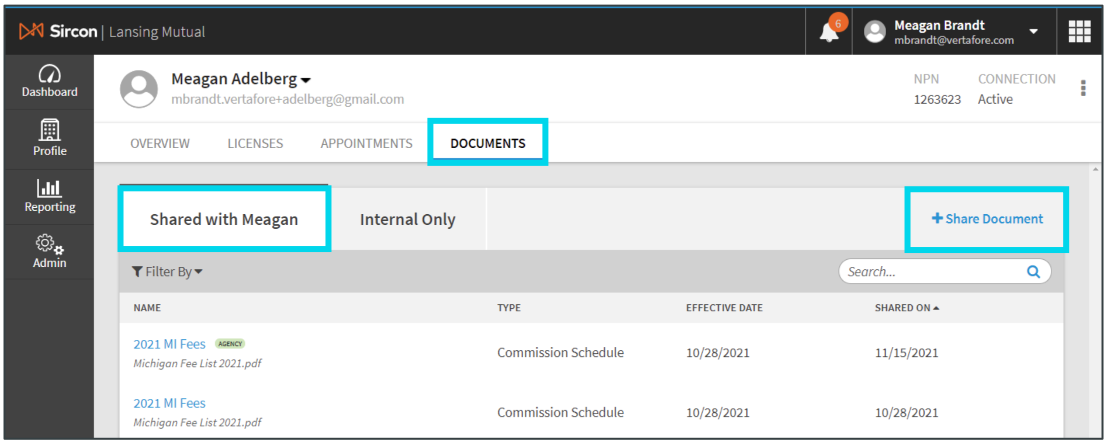


Section: Attach a Document to a Single Producer Record

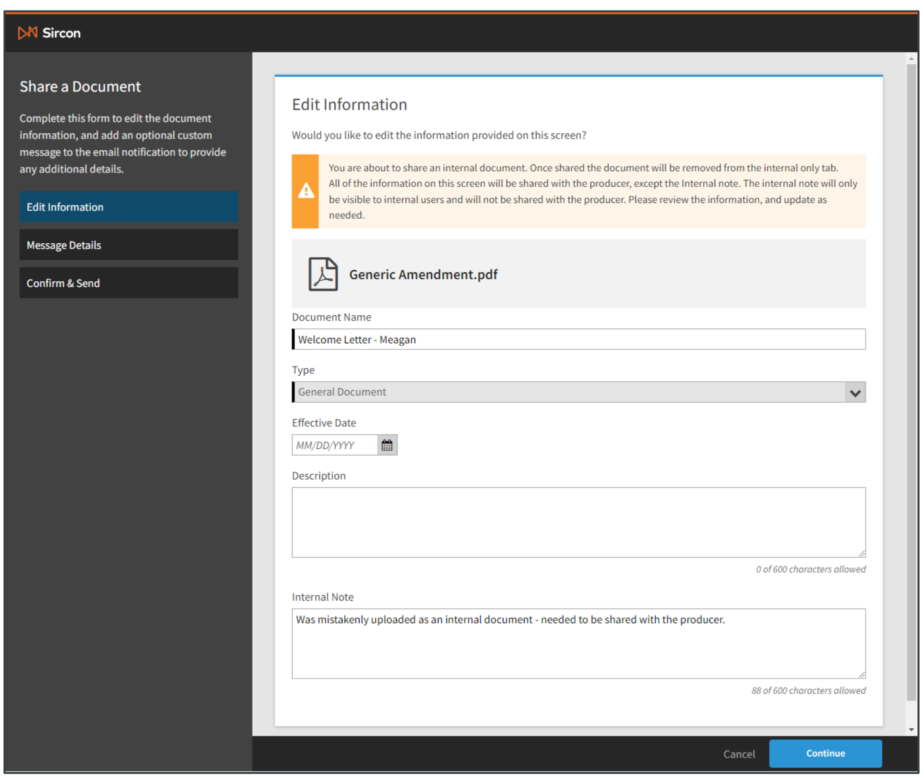
SHARE AN INTERNAL DOCUMENT

In the event that an internal document should be shared with the producer, you can share the document directly from the **Internal Only** tab instead of needing to re-upload it.

1. For the document you wish to share, select the **Share Document** option. This will walk you through sharing the document with the producer.



2. Review the additional data associated with the document and ensure you do not have any information (e.g. name or description text) that should not be shared with the producer.

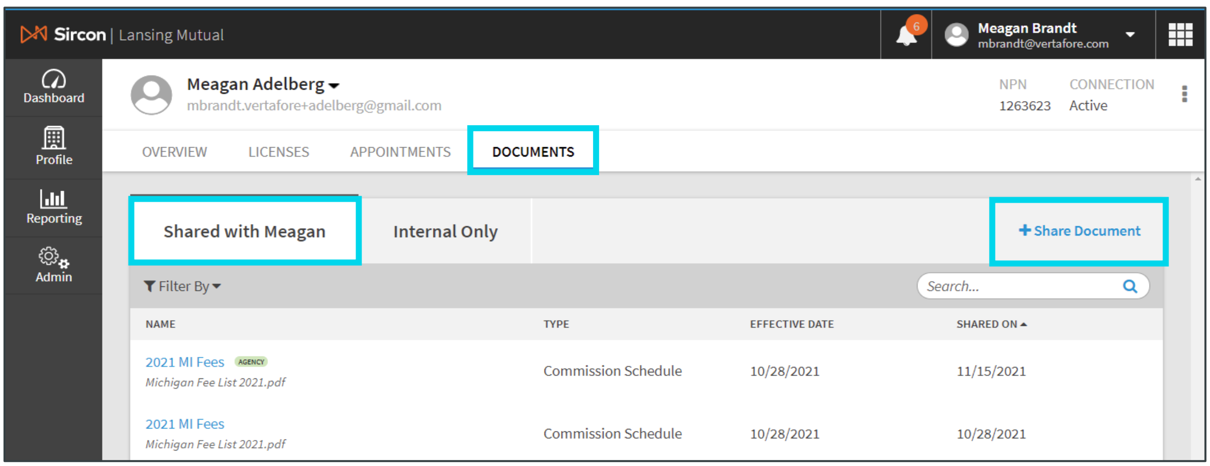


3. See the next section, Share a Document, for more information about the sharing options.

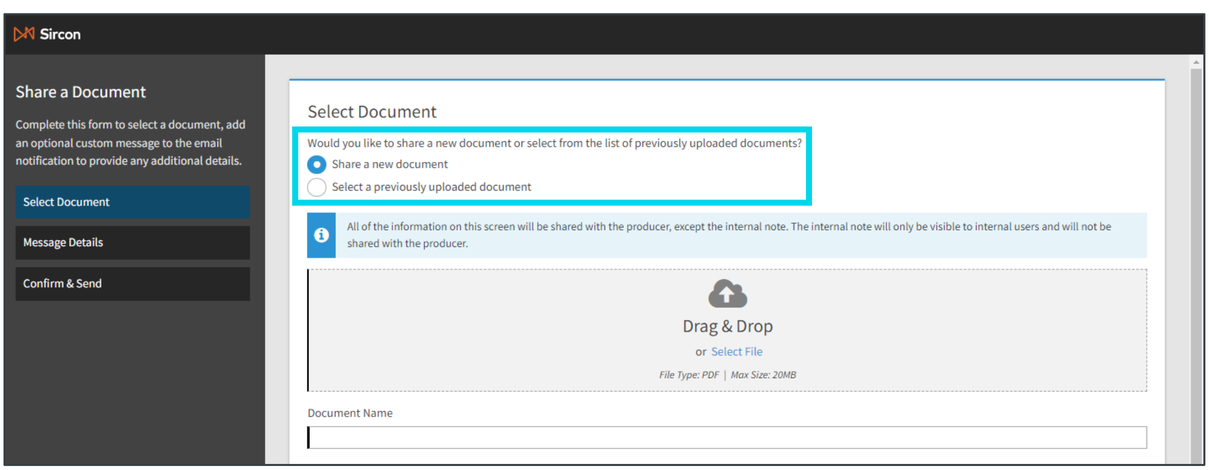
SHARE A DOCUMENT

In addition to attaching a document to a producer's record, you can also share the document with the agent via their Sircon for Individuals account. Sharing a document will send the agent a notification and let them either log into their existing Sircon account to view the document or create a Sircon account to access the document.

1. To share a document with a specific agent, either click **Share a Document with this Producer** from the **Overview** page or click **Share Document** from the **Share with ProducerName** tab.



2. When sharing a document with an agent, you can either upload a new PDF file or select a document that was uploaded as part of bulk document sharing (see Managed Documents for more information).



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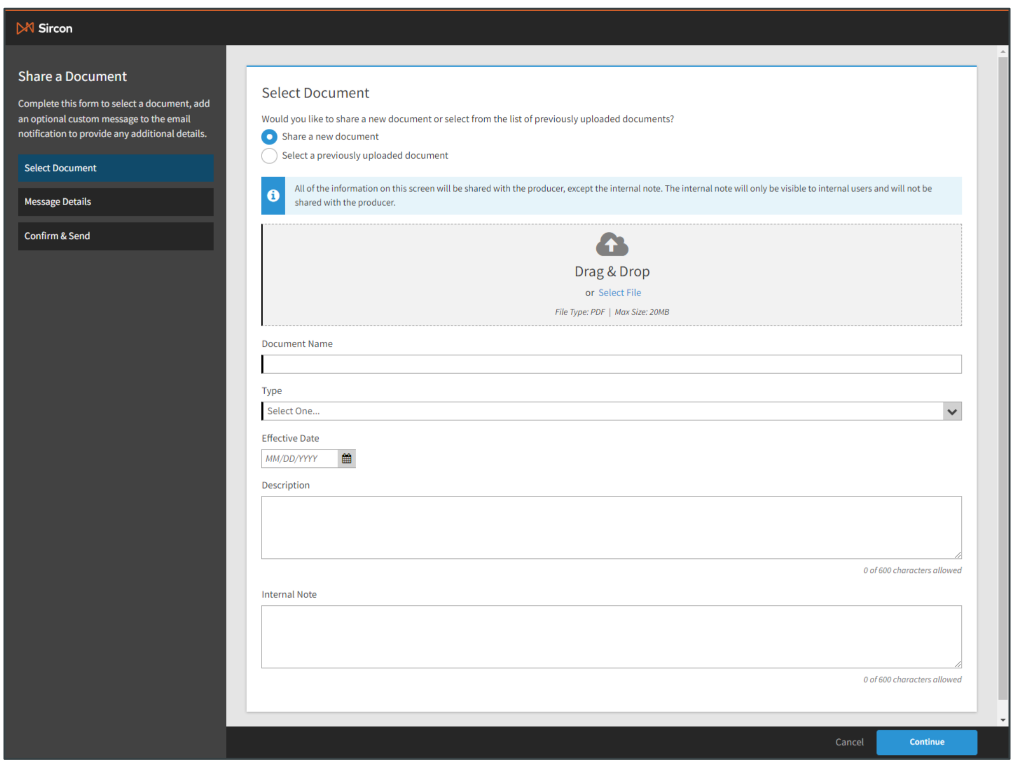
Section: Attach a Document to a Single Producer Record

Share a New Document

1. To upload a new document, select **Share a new document**.
2. Specify the PDF file by dragging & dropping or selecting it from the file system.
3. Provide additional information about the document, including a descriptive **Name**, **Type**, optional **Effective Date**, and optional **Description**.

> **Note**: The agents will see all this information when the document is shared with them, except for the internal note. The internal note will only be visible to carrier users.

4. This additional data is informational only, both to help the agents understand the purpose of the document and for users to keep track of the different shared documents.
5. Click **Continue**.



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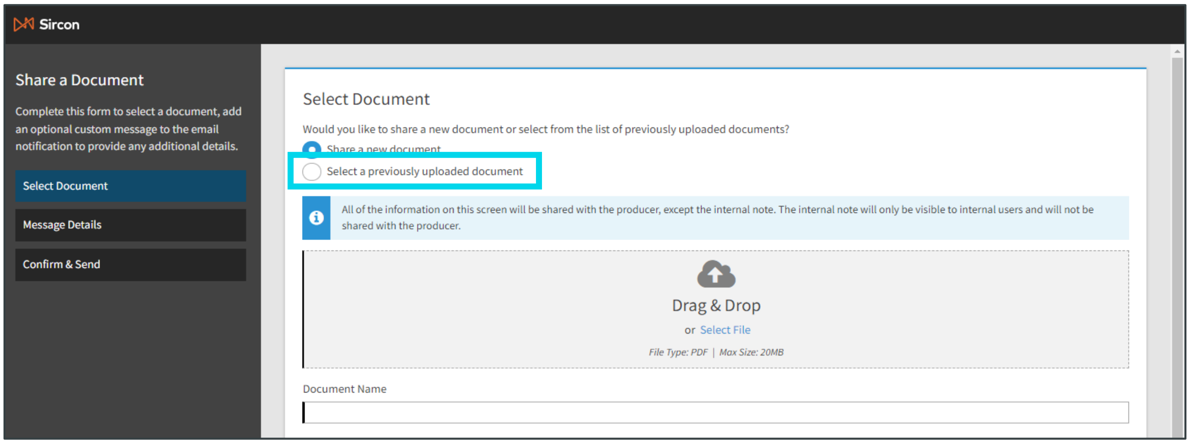
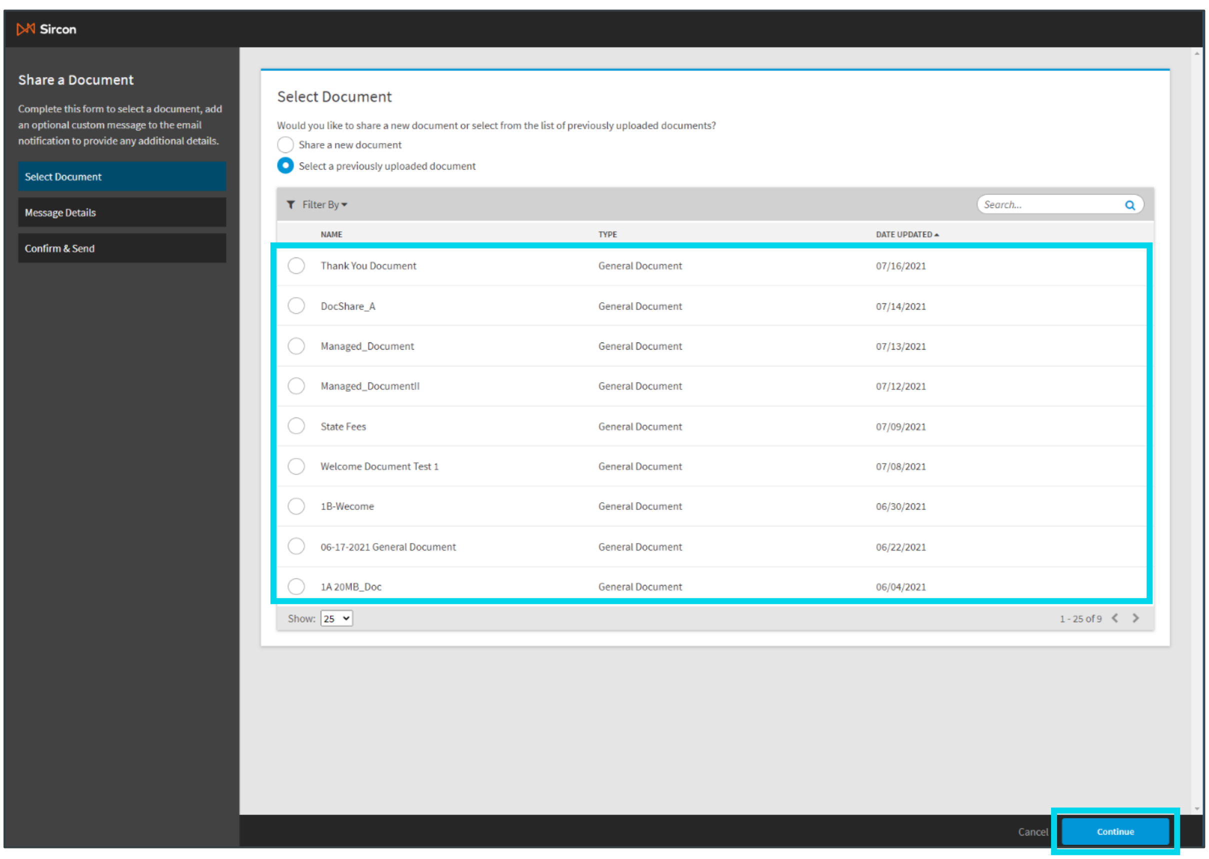
Section: Attach a Document to a Single Producer Record

Select a Previously Uploaded Document

1. To share a previously uploaded document, click **Select a previously uploaded document**.

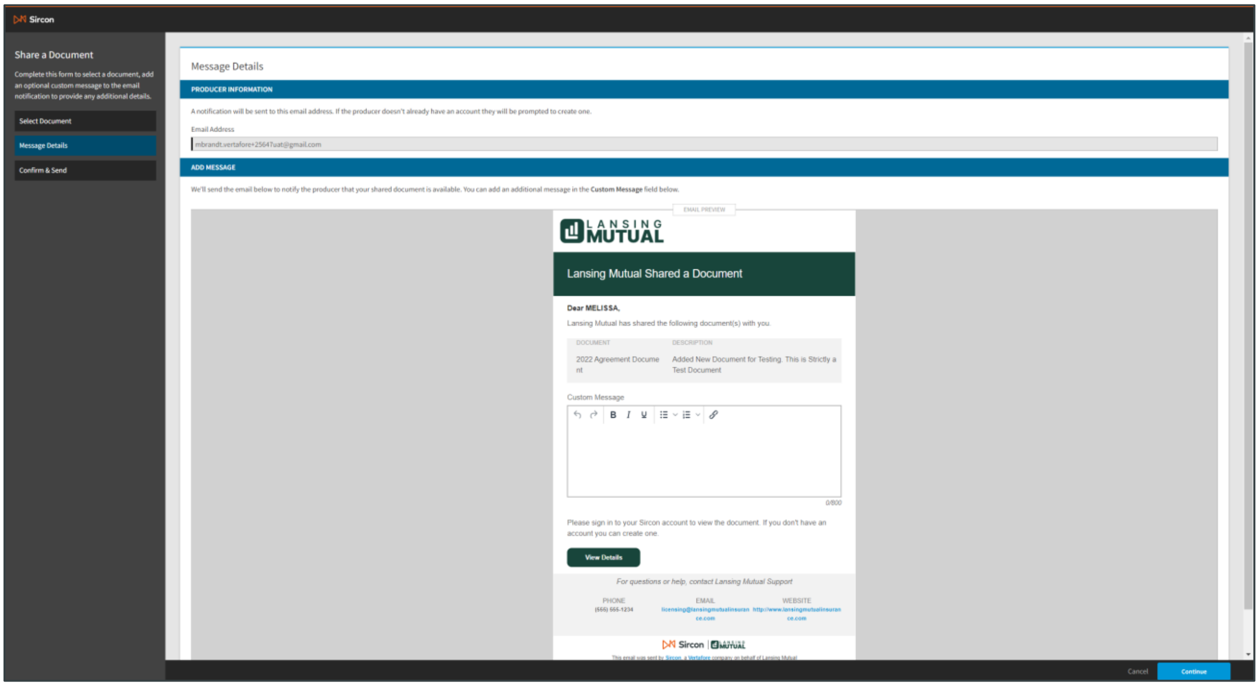


2. A list of previous documents will appear. You can search for a specific document and/or filter by document type.
3. Select the **Document** you wish to share then click **Continue**.



Message Details

When sharing the document, the agent will get an email notification of the new document. The **Message Details** step allows you to verify which email address the notification should be sent to and preview the email that will be sent. You also can enter a custom message to be included in the email.



PRODUCER EMAIL

If the producer already has a Sircon account that is connected to their Producer Central producer record, the **Producer Email** field shows the email address associated with the account that will receive the notification. This cannot be changed.

> **Note**: If there are multiple Sircon accounts associated with the producer record, you can select to which account to share the document.

If the agent does not yet have a connected Sircon account, the **Producer Email** field shows the email address on the Producer Central producer record. If there is no email address on the record this field will be blank.

> **Note**: If the email address is incorrect or missing you can change the email address that will receive the notification. To also update the producer record with the supplied email address, select the **Save the email to the producer's record** checkbox.

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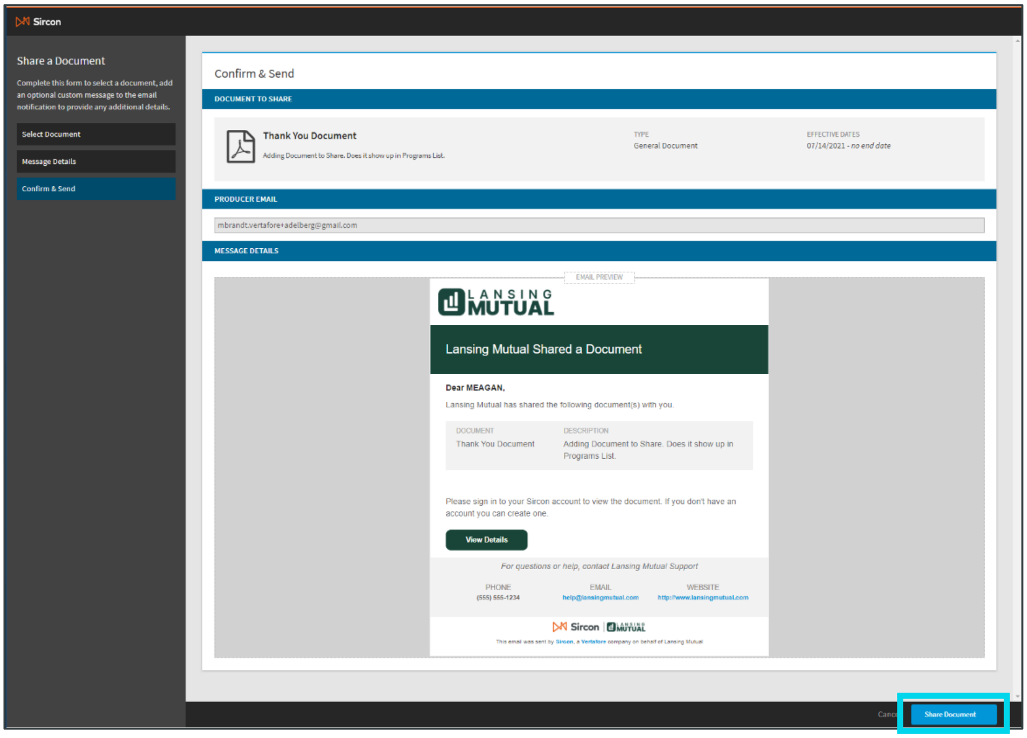
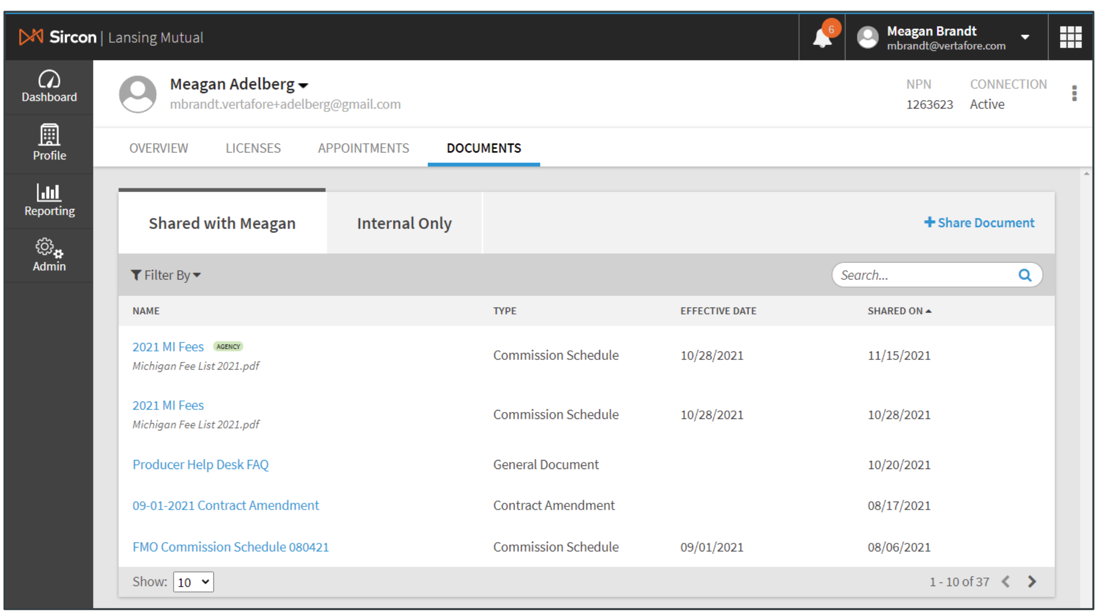
Section: Attach a Document to a Single Producer Record

Confirm & Send

1. Before sharing the document, you can review the document, email address, and message details. If everything looks correct, click **Share Document**.



2. The document will appear in the list of **Share with ProducerName** tab and the agent will receive an email informing them of the new document.



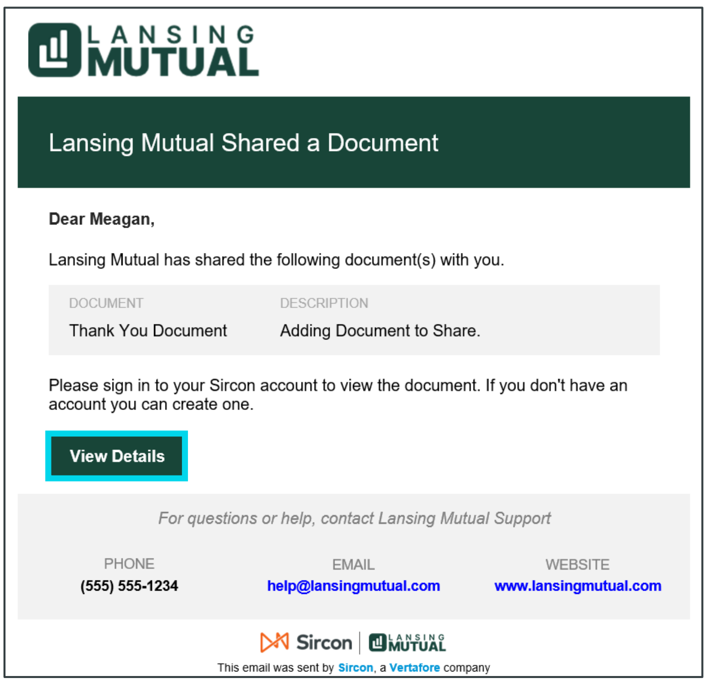
How Notifications and Shared Documents Appear to Agents

Agents with a Sircon account will receive an email that a document was shared with them. The email looks the same whether the agent already has an account or whether they need to create an account.

- If agents need to create an account, clicking **View Details** will allow the agent to either create an account, or sign in with an existing Sircon account.

> **Note**: Going through this Sign In / Signup process will also "connect" the agent's Sircon account to their producer record.

- If the agent already has a connected Sircon account, clicking **View Details** takes them directly to the login page.

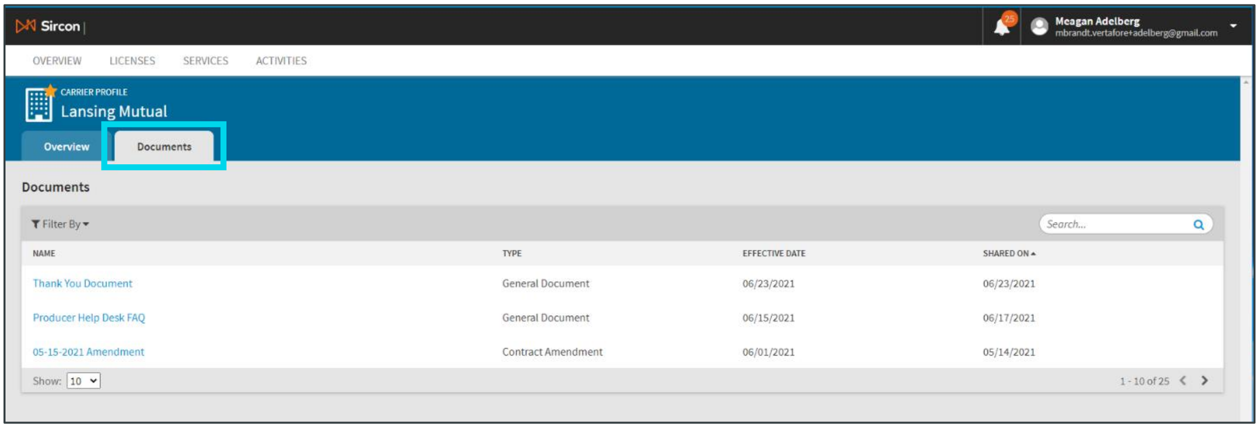


> **Note**: When testing this functionality in UAT, a whitelist can be configured to control which email addresses or email domains can receive notifications. Please contact your customer support representative for more information.

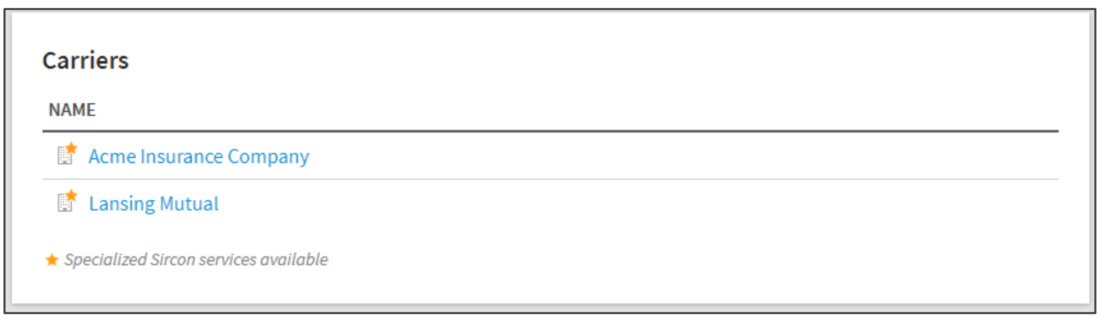
Section: How Notifications and Shared Documents Appear to Agents

Accessing the Document

1. Once the agent logs into their new or existing Sircon account they will be directed to the **Documents** tab for the document they just received.



- The **Documents** tab can also be accessed from the account **Overview** page by selecting the carrier's name in the **Carriers** panel and then clicking the **Documents** tab.



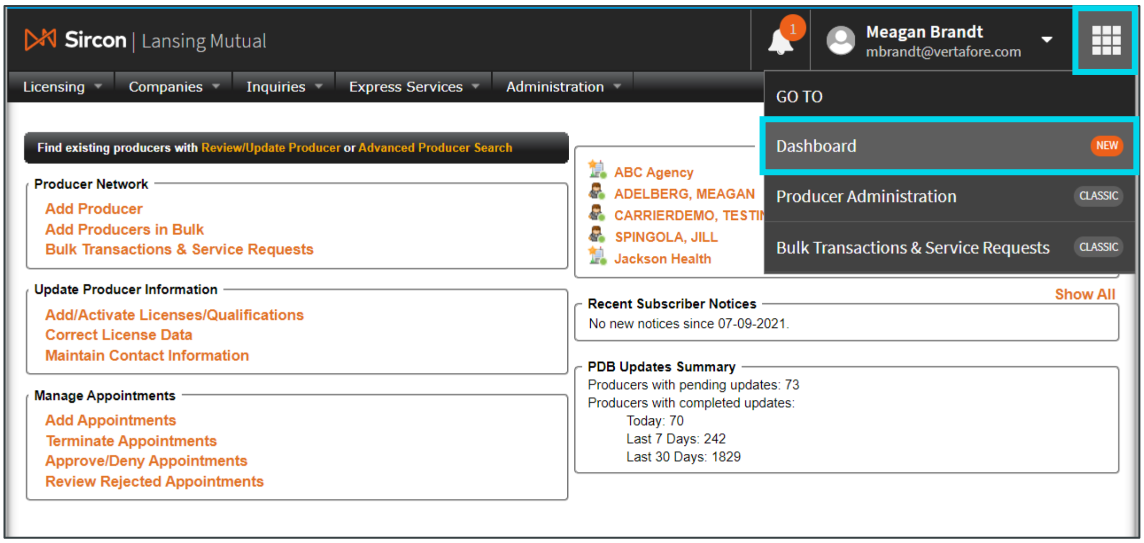
Viewing the Document

Clicking a document shows the details about the document and the agent can **Download** the PDF file.

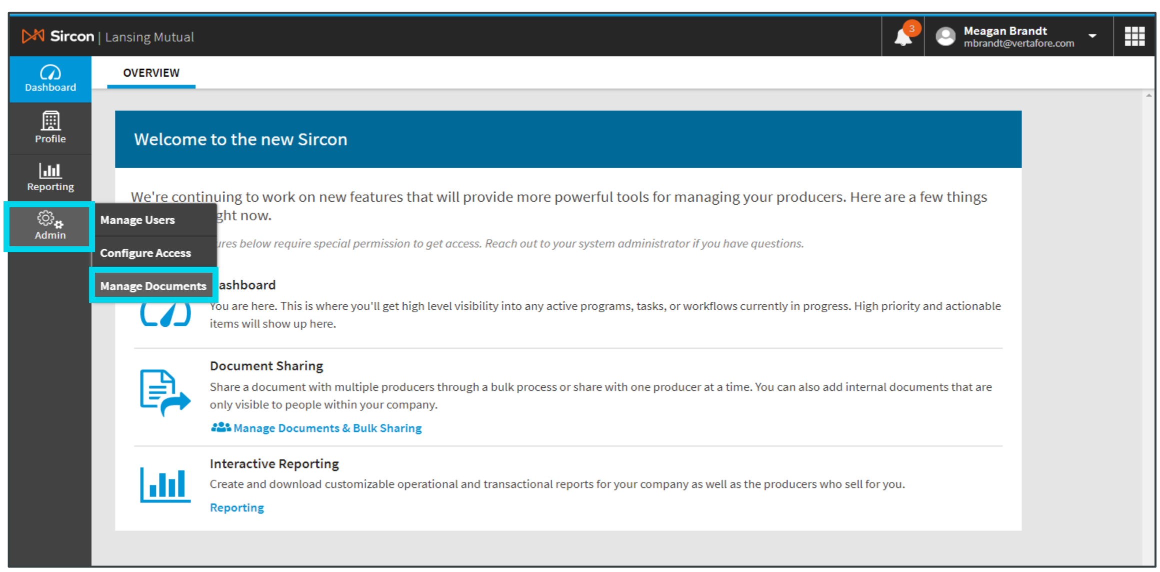
Managed Documents (Bulk Document Sharing)

Document sharing in bulk is available if you need to share the same document with more than one agent. Just like sharing a document with a specific agent, sharing a document to a set of agents will send an email notification to each recipient and they can view the document within their Sircon account.

1. From within the classic producer administration view, click the top right navigation and select **Dashboard**.



2. This will take you to the new Sircon Producer Central dashboard. Under the **Admin** navigation, select **Manage Documents**.



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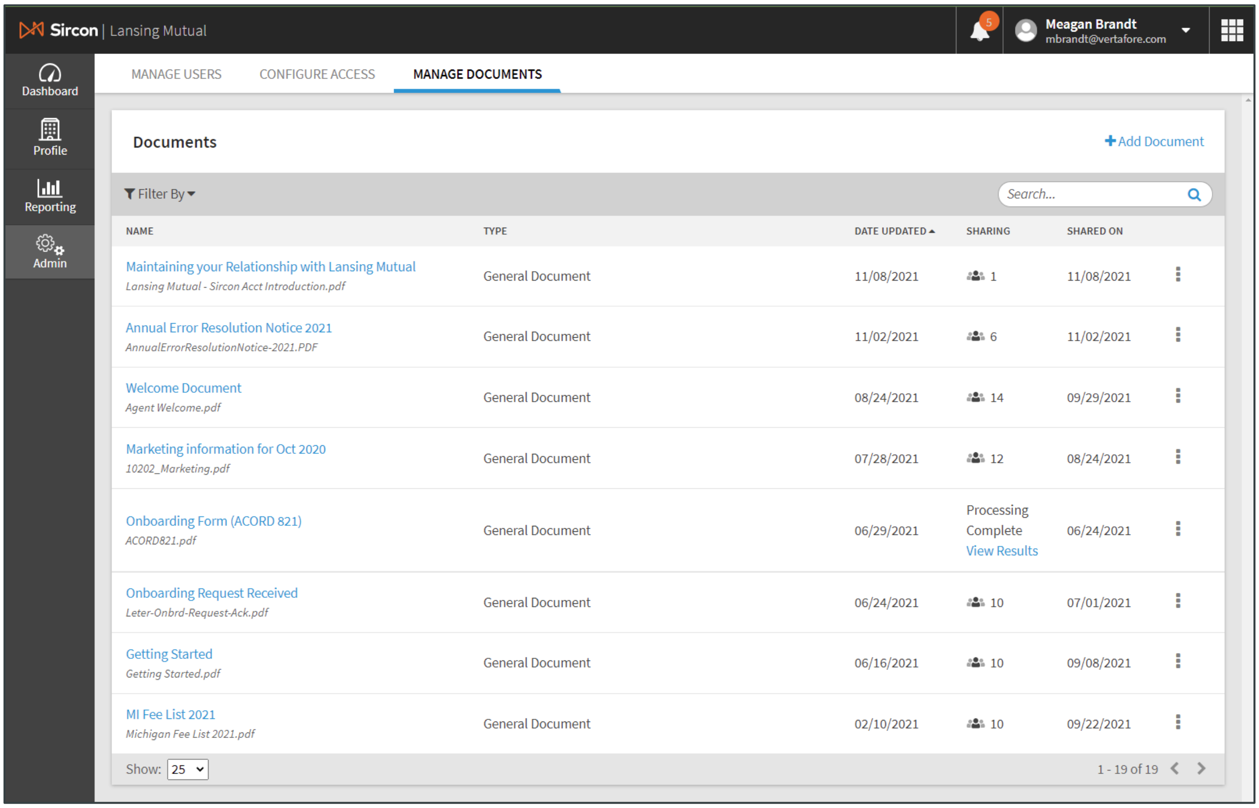
Section: Managed Documents (Bulk Document Sharing)

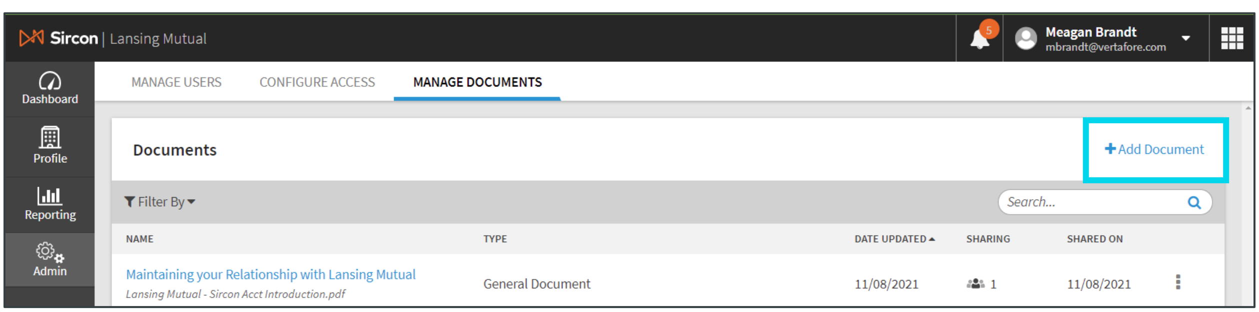
Manage Documents View

The **Manage Documents** view is where you can view and add documents, share documents with a set of agents, and view the shared status of documents.



Add a Document

1. To upload a document, click **Add Document**.

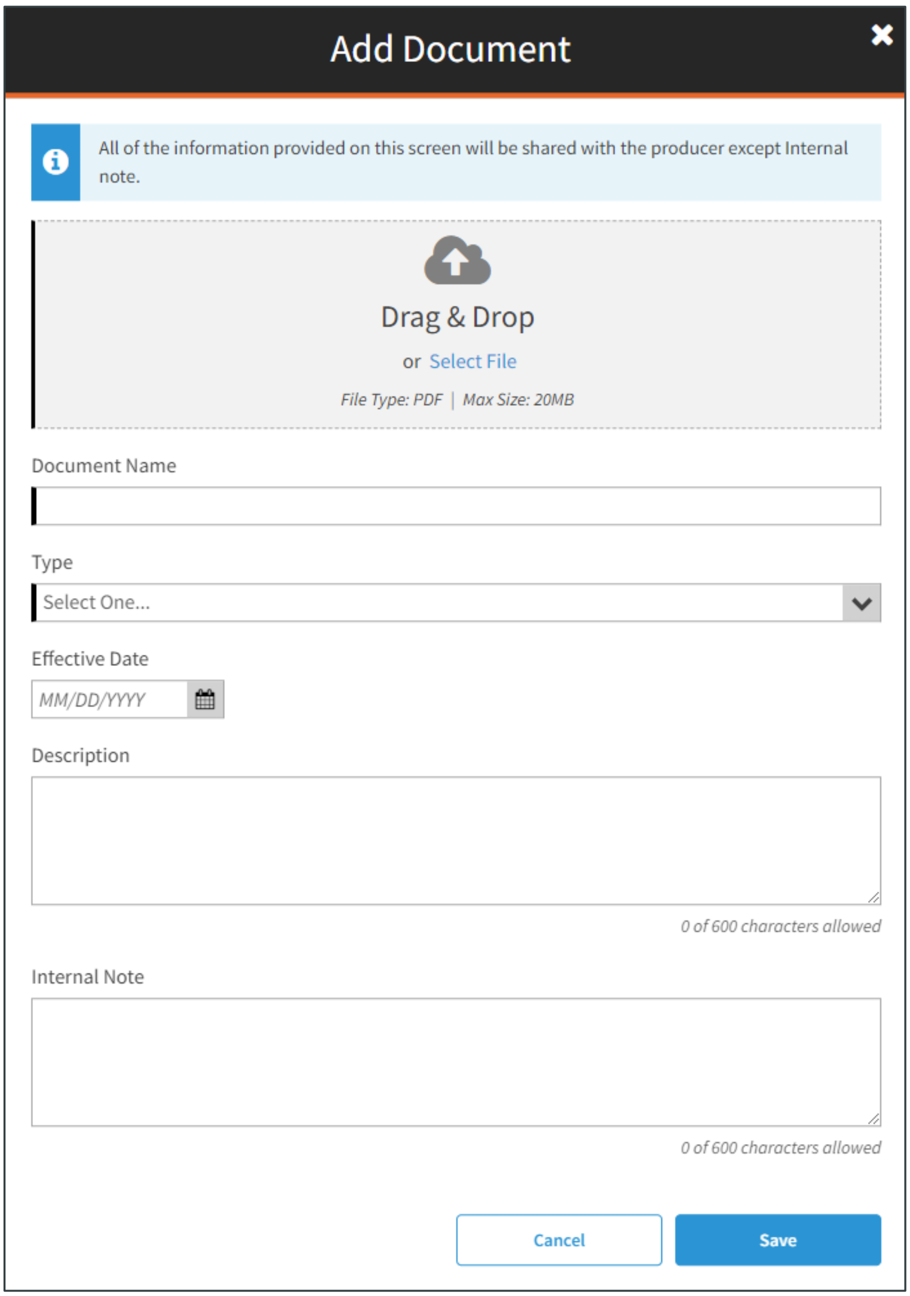


2. Specify the PDF file by dragging & dropping it or selecting it from the file system.

> **Note**: The PDF document file size cannot exceed 20MB.

Section: Managed Documents (Bulk Document Sharing)

3. Provide additional information about the document, including a descriptive **Name**, **Type**, optional **Effective Date**, and optional **Description**.
4. The agents will see all this information when the document is shared with them, except for the **Internal Note**. The internal note will only be visible to carrier users.
5. This additional data is informational only, both to help the agents understand the purpose of the document and for users to keep track of the different shared documents.
6. Click **Save**.



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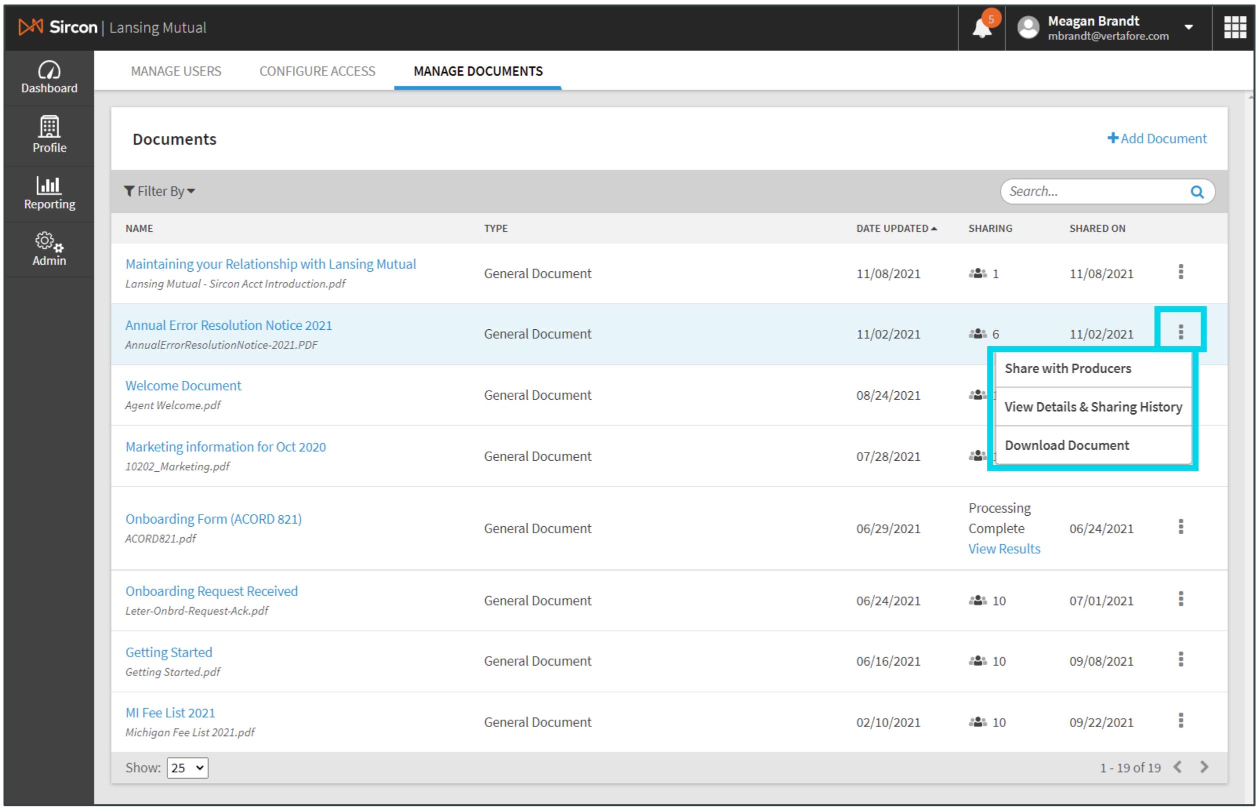
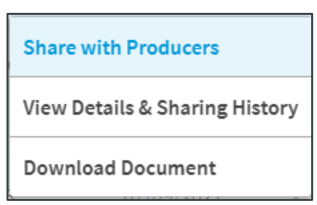
Section: Managed Documents (Bulk Document Sharing)

7. Once a document is in the system, it will display in the **Documents** list. Click the **...** button next to the document to display additional options. From there you can **Share it with Producers**, **View Details & Sharing History**, and **Download the Document**.



SHARE WITH PRODUCERS

To share a document, select the **Share with Producers** option for that document.



The Share with Producers flow walks you through the steps to:

- Add recipients by uploading a CSV file
- Verify the CSV file format is correct
- Review how many recipients can receive the documents and any errors found when looking up the producer records
- Preview the email that will be sent to agents and optionally add a custom message to be displayed in the email
- Confirm and send

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Section: Managed Documents (Bulk Document Sharing)

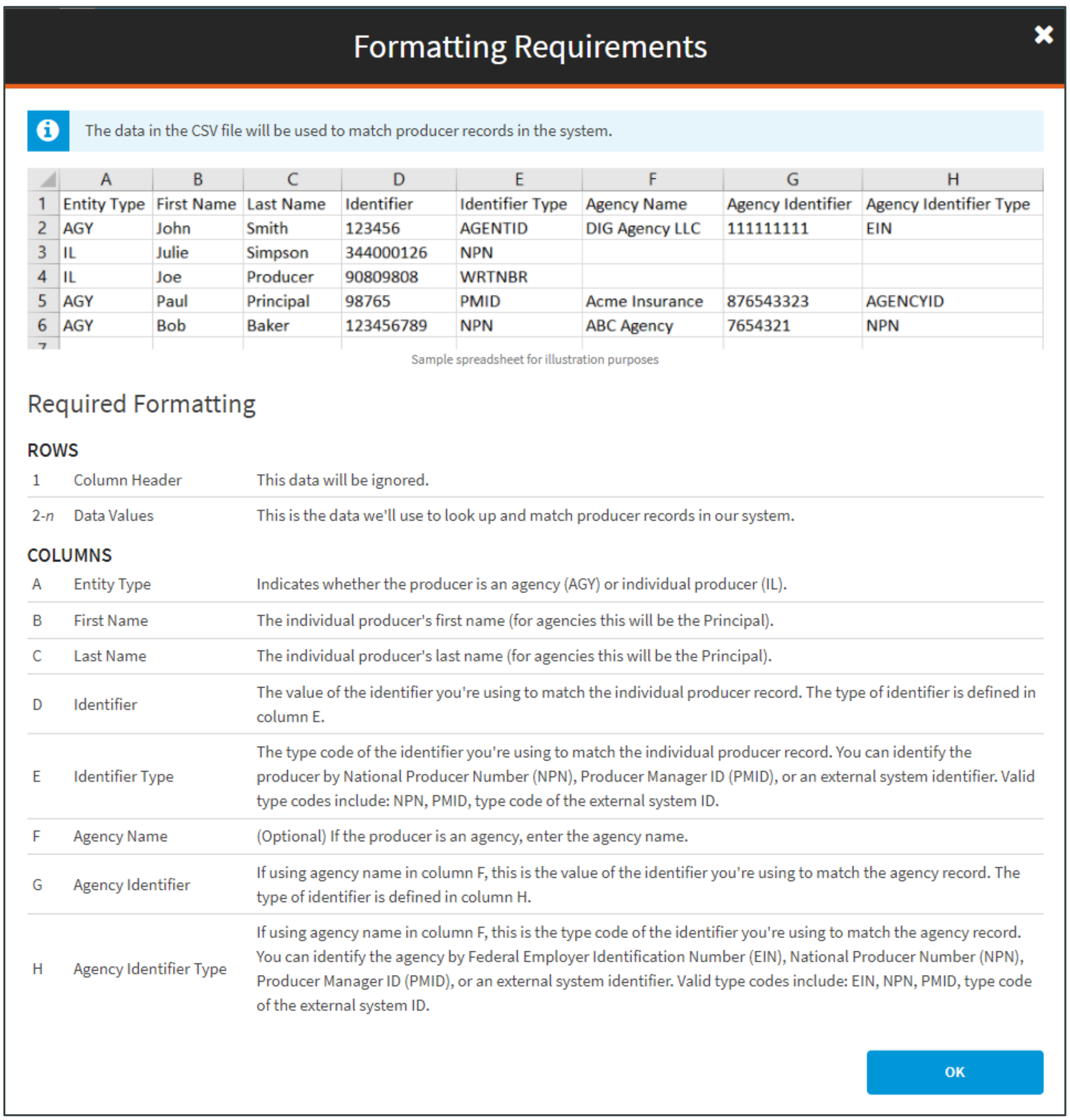
Upload Recipients

Sharing a document in bulk allows you to send multiple individuals a document at one time. Before you can complete this process, you must:

- Identify the recipients of the document in a CSV file.
- Ensure that agents are already in Producer Central. Agents need to be in the system to be eligible to receive a document.

Currently documents can only be sent to individuals. But, if you need to share an agency focused document, you can specify the principal (or other responsible person) in the CSV file. They will receive the agency document in their individual Sircon account.

1. On the **Upload Recipients** page, click **View Formatting Requirements** to see the required file format for the CSV file or see the below illustration.



Formatting Requirements

The data in the CSV file will be used to match producer records in the system.

	A	B	C	D	E	F	G	H
1	Entity Type	First Name	Last Name	Identifier	Identifier Type	Agency Name	Agency Identifier	Agency Identifier Type
2	AGY	John	Smith	123456	AGENTID	DIG Agency LLC	111111111	EIN
3	IL	Julie	Simpson	344000126	NPN			
4	IL	Joe	Producer	90809808	WRTNBR			
5	AGY	Paul	Principal	98765	PMID	Acme Insurance	876543323	AGENCYID
6	AGY	Bob	Baker	123456789	NPN	ABC Agency	7654321	NPN

Sample spreadsheet for illustration purposes

Required Formatting

ROWS

1	Column Header	This data will be ignored.
2-*n*	Data Values	This is the data we'll use to look up and match producer records in our system.

COLUMNS

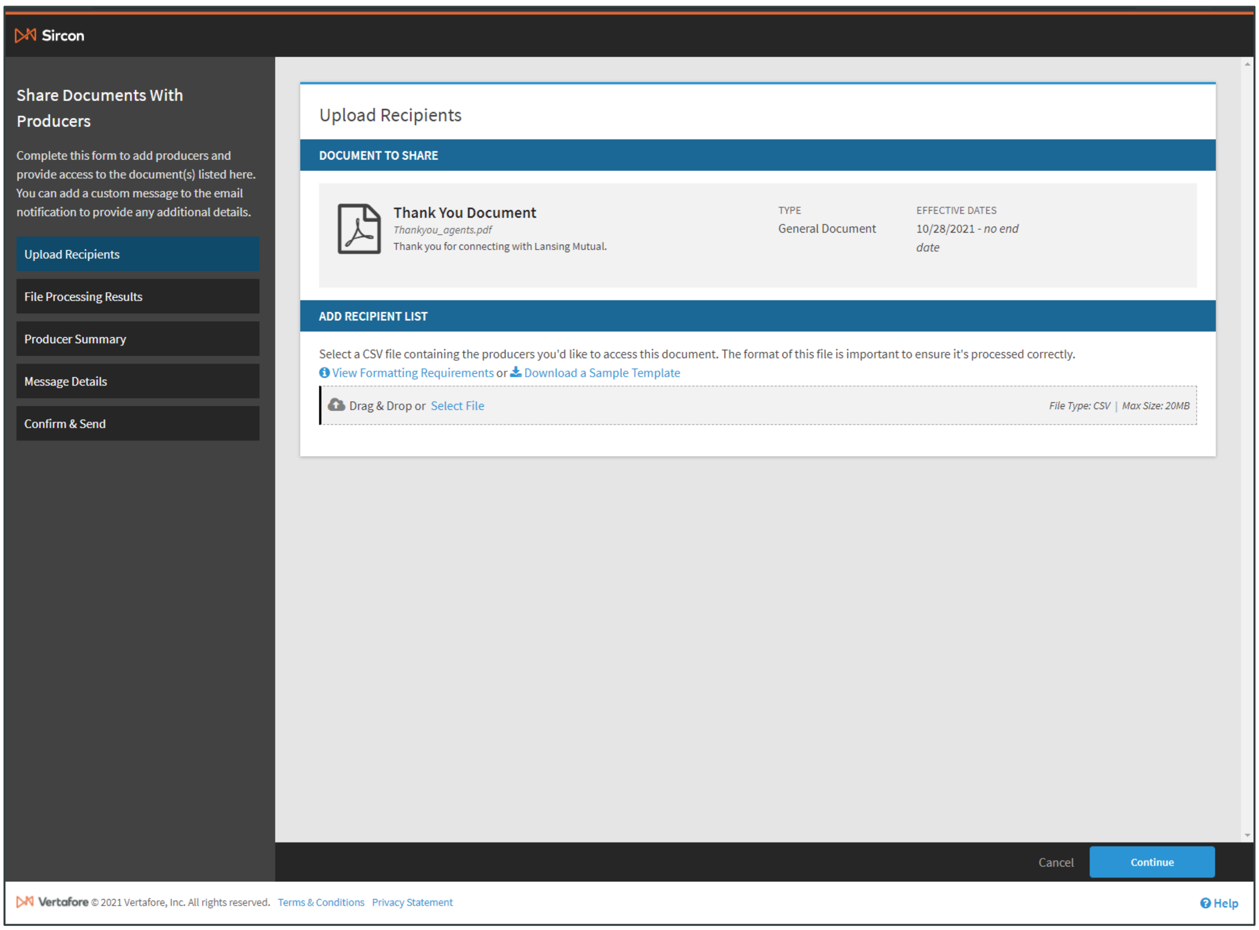
A	Entity Type	Indicates whether the producer is an agency (AGY) or individual producer (IL).
B	First Name	The individual producer's first name (for agencies this will be the Principal).
C	Last Name	The individual producer's last name (for agencies this will be the Principal).
D	Identifier	The value of the identifier you're using to match the individual producer record. The type of identifier is defined in column E.
E	Identifier Type	The type code of the identifier you're using to match the individual producer record. You can identify the producer by National Producer Number (NPN), Producer Manager ID (PMID), or an external system identifier. Valid type codes include: NPN, PMID, type code of the external system ID.
F	Agency Name	(Optional) If the producer is an agency, enter the agency name.
G	Agency Identifier	If using agency name in column F, this is the value of the identifier you're using to match the agency record. The type of identifier is defined in column H.
H	Agency Identifier Type	If using agency name in column F, this is the type code of the identifier you're using to match the agency record. You can identify the agency by Federal Employer Identification Number (EIN), National Producer Number (NPN), Producer Manager ID (PMID), or an external system identifier. Valid type codes include: EIN, NPN, PMID, type code of the external system ID.

OK

Section: Managed Documents (Bulk Document Sharing)

2. To upload the CSV file, either drag & drop the file or select it from the file system. Click **Continue**.

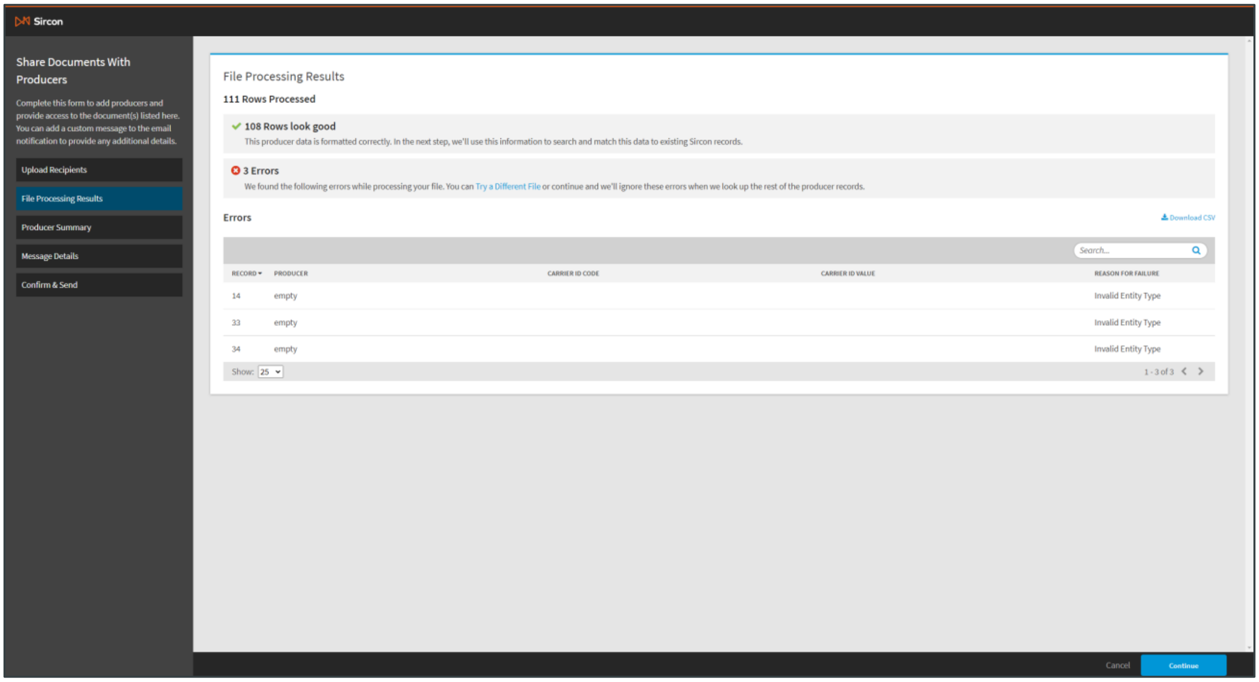
> **Note**: There is a max limit of 20K rows for the CSV file. If you need to send a single document to more than 20K producers, you will need to create multiple CSV files and share the document multiple times using different CSV files.



Section: Managed Documents (Bulk Document Sharing)

File Processing Results

The **File Processing Results** step lets you know if there are any formatting errors in the CSV file. Errors are displayed in a table so you can tell what went wrong. You can either fix the file and start over or **Continue** if the errors do not impact your recipient list.



Producer Lookup

After verifying the file format, the system will process the CSV file and lookup the recipients in Producer Central. Depending on the number of records in the file, this process could take a while. While it is processing you will be returned to the **Manage Documents** view so you can do other work while you wait. A progress bar is displayed so you can see the status of the lookup.

> **Note**: If you decide you don't want to finish the producer lookup step, you can click the **Cancel** link to stop the process.

Once the file has completed processing, you will receive an in-application alert that it is done. The document will also show a status of **Processing Complete** in the **Manage Documents** view. Click **View Results** to finish sharing the document.

Section: Managed Documents (Bulk Document Sharing)

Producer Summary

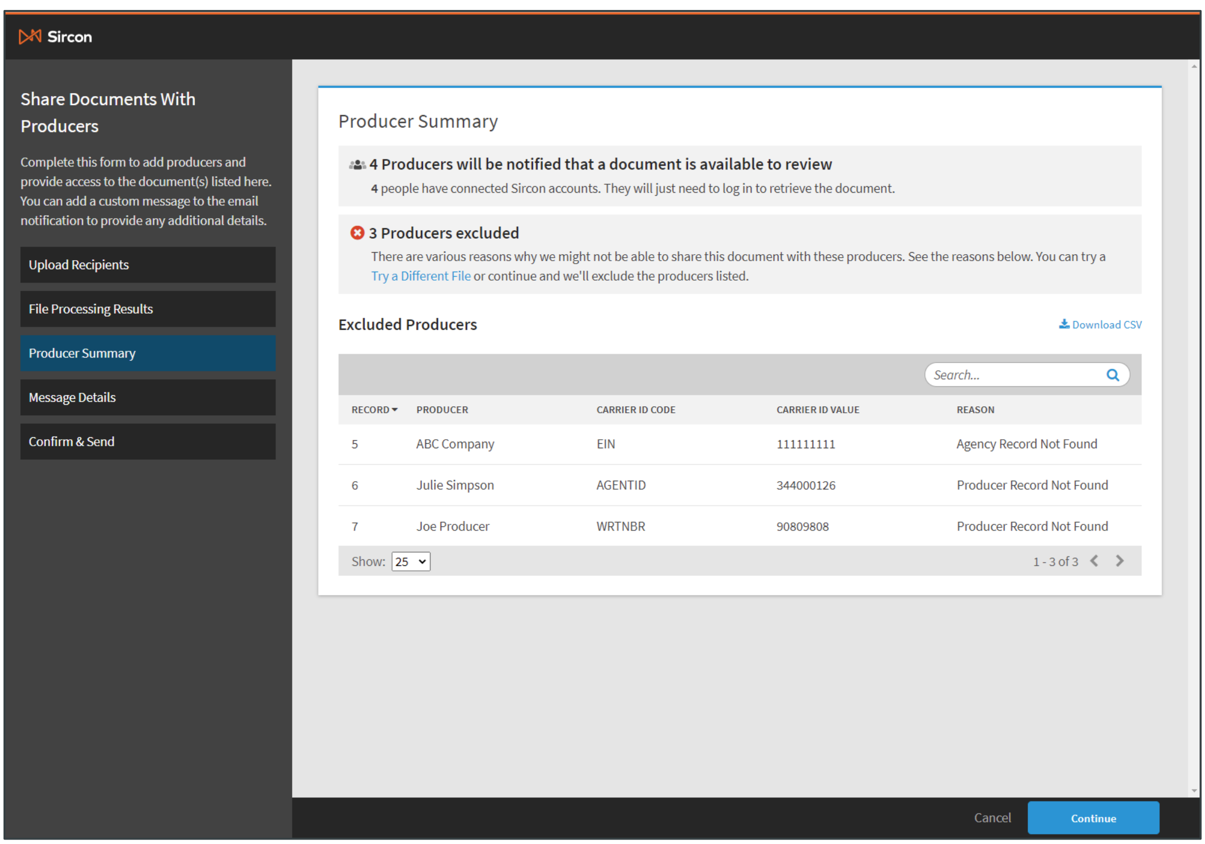
After the file is processed and you click **View Results**, a summary is displayed that shows how many producers will receive the document and information about errors.

- Count of producers who will be notified of the document.
    - Count of producers who already have a connected Sircon account
    - Count of producers who don't yet have a connected Sircon account and will get invited to create one.

> **Note**: An agent may already have a Sircon account, but it may not be connected yet to the Producer Central record. The invite will detect if they already have a Sircon account for that email address.

- Count of producers who were either not found in Producer Central or were missing data required to share the document
- Detailed list of the producers who were not found or had a data error. This list can be exported to a CSV file if needed.

> **Note**: If an agent already has access to this document because it was shared with them previously, they will not receive a notification and will not receive multiples copies of the document.



Section: Managed Documents (Bulk Document Sharing)

Producer Identification in Producer Central

The system uses the **Identifier** and **Last Name** columns from the CSV file to lookup the agent in Producer Central. To determine where to send the notification:

- If the producer already has a connected Sircon account, the notification is sent to the email address associated with the Sircon account.
- If the producer does not already have a connected Sircon account, the notification is sent to the email address on the Producer Central record.

> **Note**: The system looks up both the individual and the agency provided in the CSV file to ensure both exist in the system. The document is only shared with the individual.

Reasons for Excluded Producers

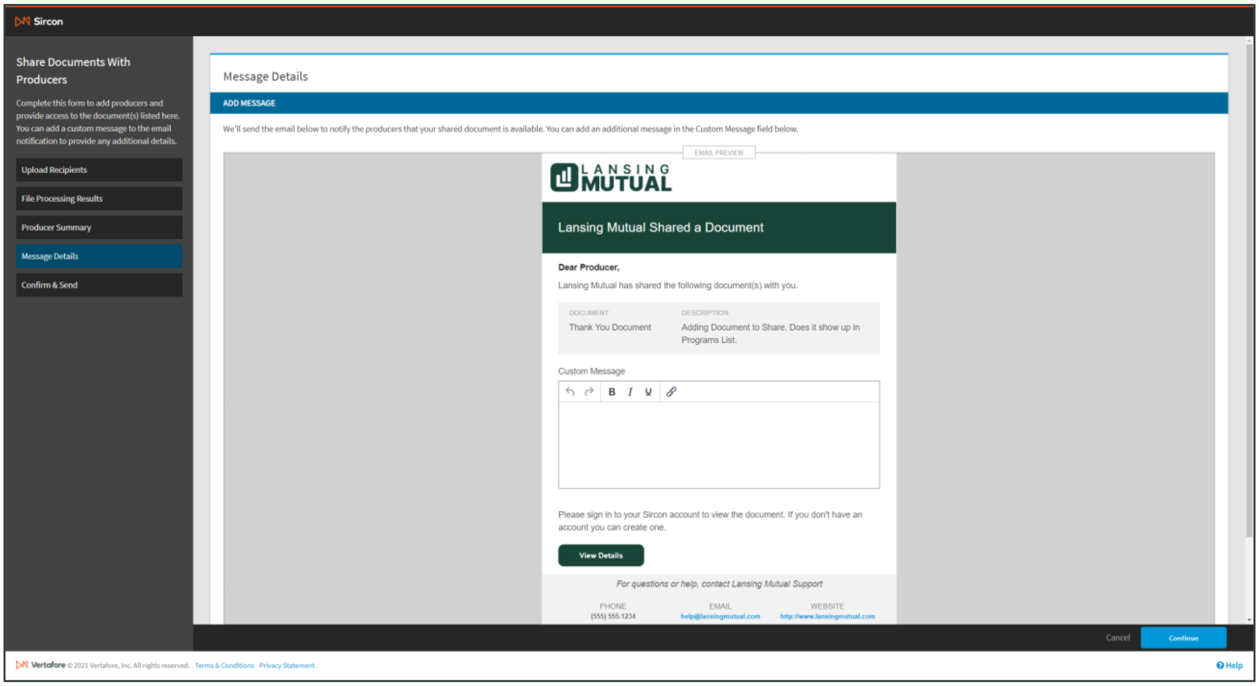
The following are the possible reasons why the document cannot be shared with producers in the CSV file:

Reason	Description
Agency and Principal Record Not Found	Cannot find either the agency or principal with the provided info.
Agency Principal Record Not Found	Cannot find the agency principal with the provided info.
Producer Record Not Found	Cannot find the individual with the provided info.
No Email on Record	If the producer does not have a connected Sircon account and the producer record does not have an email address.
Document Already Shared with Producer	The document was already shared with the producer.
Name Mismatch	The last name of the individual or the agency name on the producer record does not match the name is the CSV file. Name check is not case sensitive, and matching allows 2 letters transposed. For example, "testing" and "testign" matches, but "test" and "etts" does not match.
Inactive Identifier	If the external system ID provided in the CSV is not active on the producer's producer record.

To continue sharing the document with found producers, click **Continue**.

Message Details

The **Message Details** step allows you to preview the email that will be sent to the agents. An optional custom message can be added to the email.



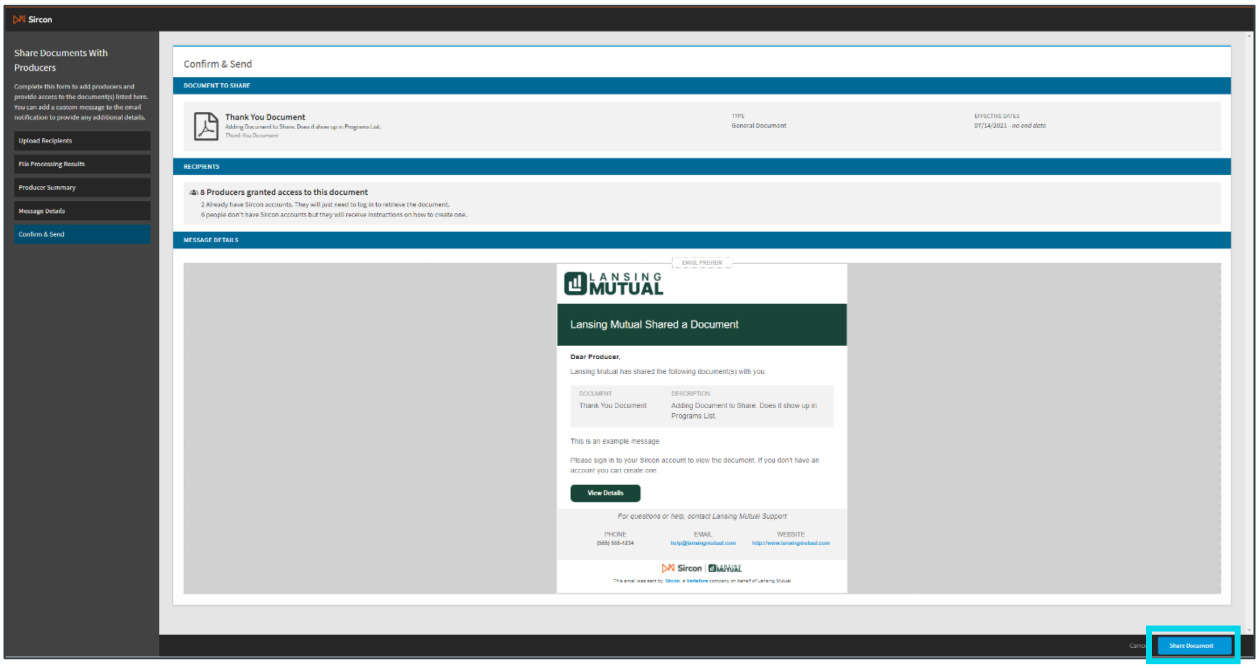
The email will apply any custom branding configured on the Profile page in the new view. See the Carrier Communications and Branding section of this document for more information.

Section: Managed Documents (Bulk Document Sharing)

Confirm & Send

There is an opportunity to review the sharing details, including how many people will receive the document before it is shared with agents.

1. Click **Share Document** to share the document.



2. Once sent the **Documents** view is updated to reflect when the document was last shared and how many total producers it was shared with.
3. Agents will receive an email notification about the new document, and they will log into their Sircon account (or create a Sircon account) to view the details.

See Agents – Notification and View Shared Documents for more information about the agent experience.

> **Note**: When testing this functionality in UAT, a whitelist can be configured to control which email addresses or email domains can receive notifications. Please contact your customer support representative for more information.

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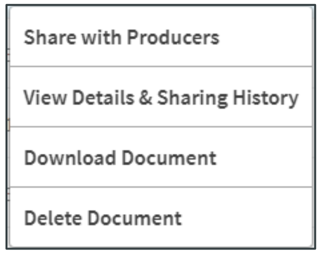
Section: Managed Documents (Bulk Document Sharing)

OTHER DOCUMENT ACTIONS

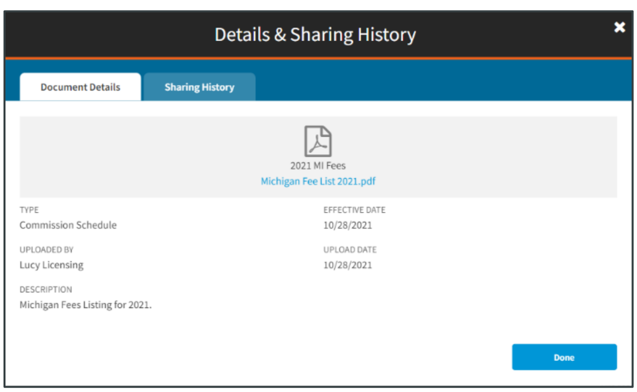
The following are additional actions that can be taken on a specific document within the **Manage Documents** page.

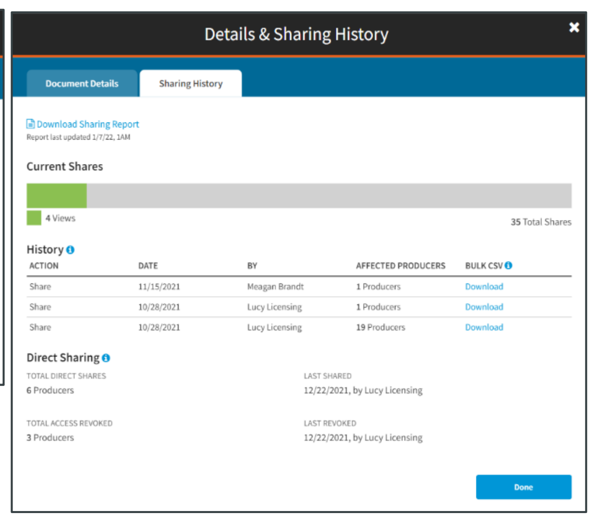


View Details & Sharing History

The **View Details & Sharing History** option provides detailed information about a specific document.

- It displays the information provided when the document was uploaded, including when it was added and the user who uploaded it.
- History of who shared the document and with how many producers. Also allows you to download the CSV file associated with each share.
- Visualization of how many total producers the document was shared with and how many of those producers viewed the document.
- Option to download a detailed report of producers who have access to the document.





Download Document

Use the **Download Document** option to view the contents of the PDF document.

Cancel Processing

Use the **Cancel Processing** option when you have started sharing a document but don't wish to finish the sharing.

Revoke Access

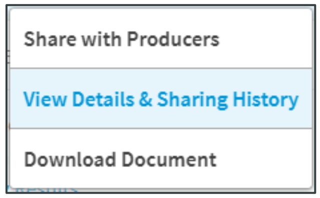
This option is used to remove access to an already shared document. See Revoke Access to a Shared Document for more information.

Delete Document

If you have not yet shared a document with agents, you can use the Delete Document option to remove it. Once a document has been shared, it cannot be deleted.

Tracking Bulk Document Sharing Results

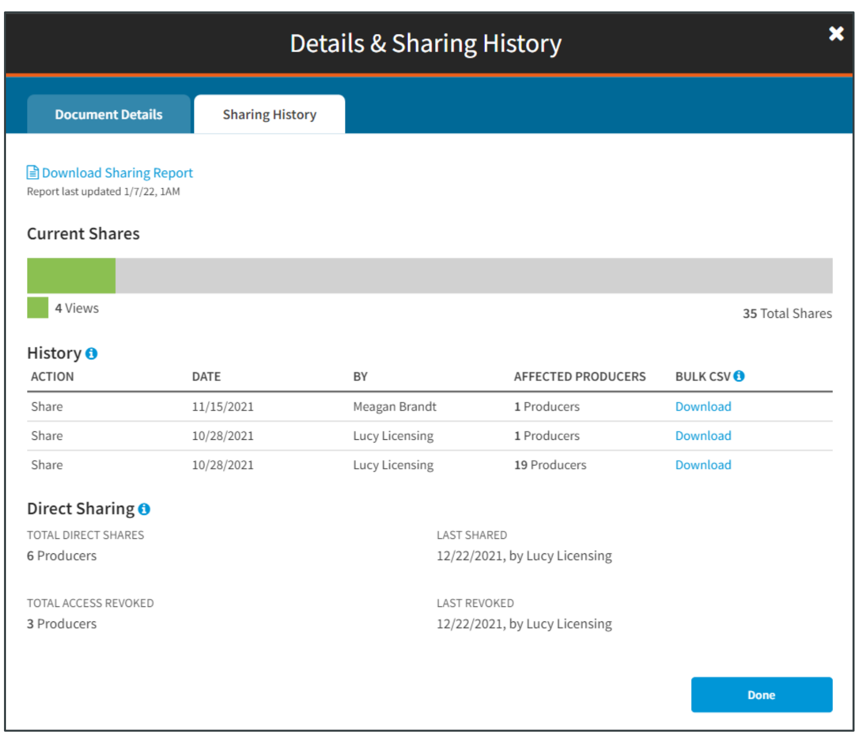
1. To track document sharing details, select the **View Details and Sharing History** for a specific document from **Admin > Manage Documents**.



2. When sharing a document with a set of agents, you can track the results of this campaign, including:
   - How many producers the document was shared with
   - How many produced actually viewed the document
3. Under the **Current Shares** section, you will see a visualization showing the number of views in relation to the shares. You can also download the CSV file associated with each share.

> **Note**: The visualization does not include producers from whom the document was revoked.

4. You can also download a report with details about the producers with whom the document was shared.



Section: Tracking Bulk Document Sharing Results

Reporting Data

The downloadable report data is generated nightly, so the downloadable report is as of 1am that day. Additionally, this reporting only applies to sharing a document in bulk. The counts in the visualization are updated immediately.

If you want to view more details about the producers who received a document, a report is available for download in CSV format. Below is the data contained in the report.

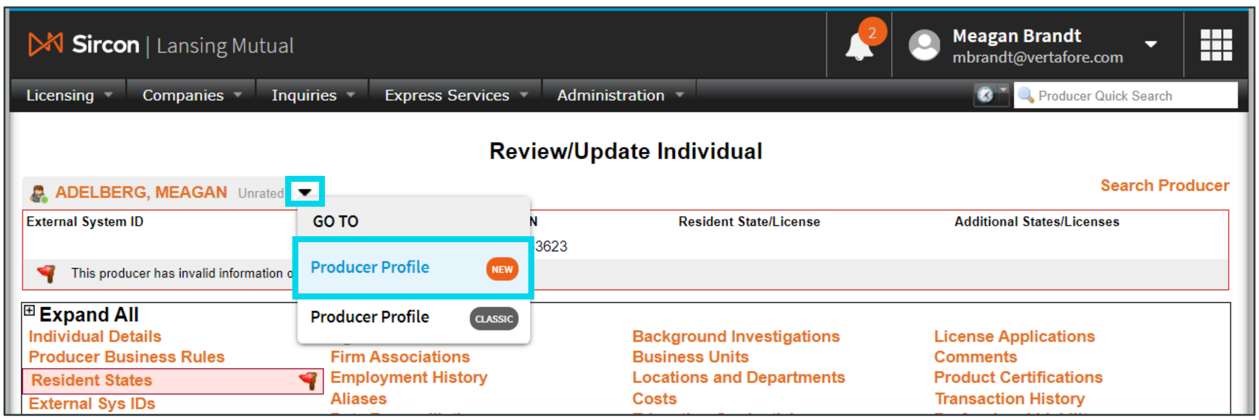
Column	Description
Producer	Name of the individual producer
Agency	Agency name, if applicable
Email	Email address stored on the Producer Central record
Status	Most recent event that occurred
Status Date	Date of the most recent event
PM ID	Internal Producer Central ID of the individual producer
Producer Type	Type of producer who receive the document (i.e. individual)
Agency_pm_id	If applicable, the agency record Producer Central ID
Date_accepted_invite	If the producer was not connected when the document was shared, the date they clicked the email link and got connected
Date_clicked_alert_link	Date the producer clicked the document notification link within their Sircon account
Date_clicked_email_link	If the producer was already connected when the document was shared, the date they click the email link
Date_invited	If the producer was not connected when the document was shared, the date the document was shared
Date_revoked	Date access to this document was removed for the producer, if applicable
Date_shared_connected	If the producer was already connected when the document was shared, the date the document was shared
Date_viewed_document	Date the producer downloaded the document PDF file in their Sircon account
External_system_ids	List of active external system IDs from the Producer Central record
Notification_email_address	The email address to which the document notification was sent
NPN	If applicable, the National Producer Number for the producer
Sircon_for_individual_email_address	The email address associated with the producer's Sircon account

Revoke Access to a Shared Document

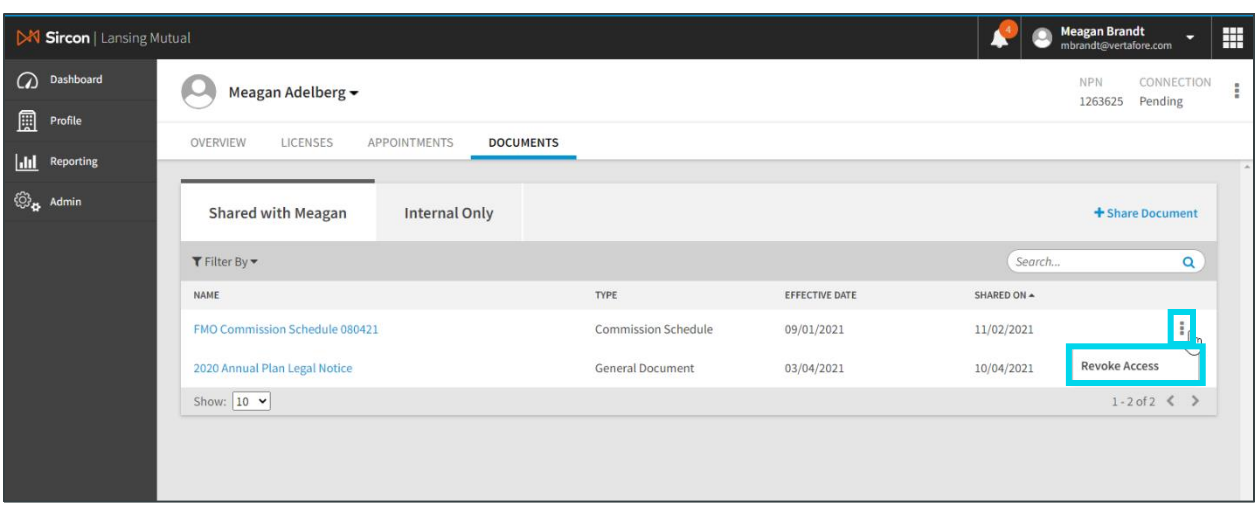
In the event the wrong document is shared with producers, there is a way to remove access to that document. Access to a document can be revoked either in bulk or for a single producer.

Revoke a Document for a Single Producer

1. To remove a document with a specific agent, navigate to the producer's Sircon profile. You can access the updated profile from the **Review/Update Individual** page in Producer Central.
2. Click the arrow next to the agent's name and select **Producer Profile (New)**.

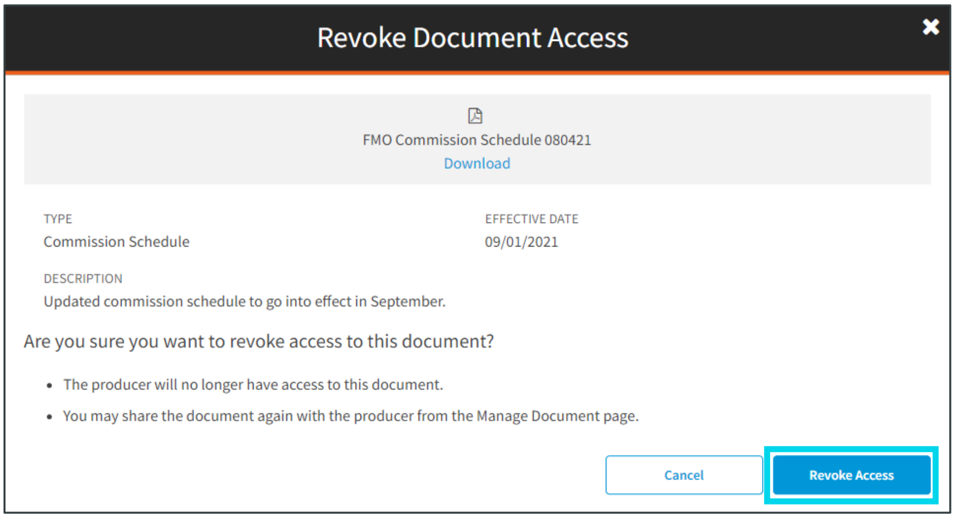


3. Once in the producer profile, go to the **Documents** page and select the **Shared with ProducerName** tab.
4. Locate the document the producer should no longer have access and select the **Revoke Access** option from the menu.



Section: Revoke Access to a Shared Document

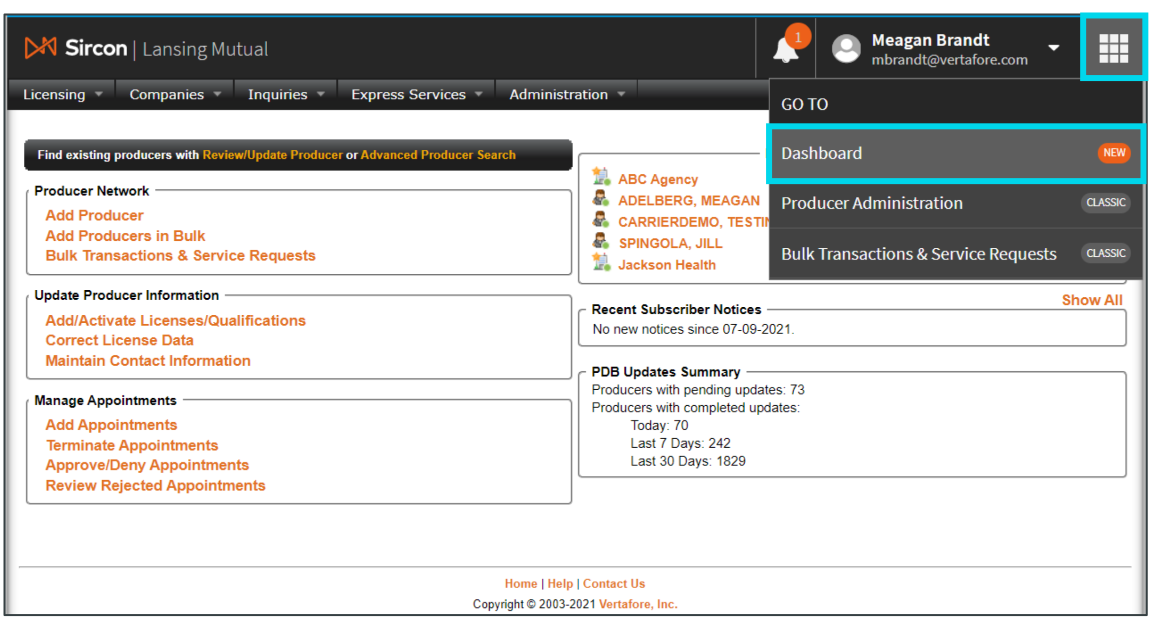
5. You will be asked to confirm the action by clicking **Revoke Access**. Once confirmed, the document no longer appears on the agent's profile and is no longer available in the agent's Sircon account. Agents will not receive a notification that they lost access to a document.



Revoke Access from All Producers for a Document

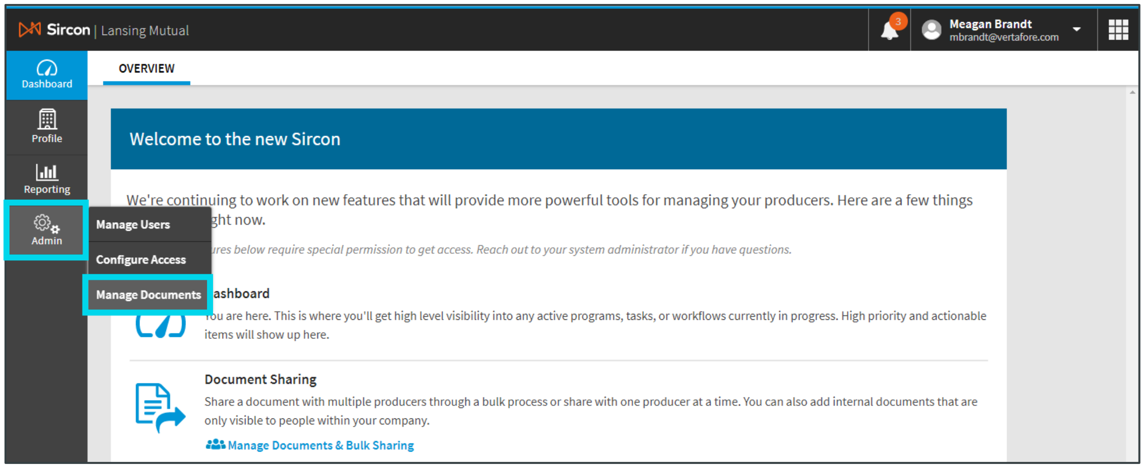
A document can be revoked in bulk if you need to remove access for more than one agent. Just like revoking a document for a specific agent, revoking a document from a set of agents will remove that document from their Sircon account.

1. From within the classic producer administration view, click the top right navigation and select **Dashboard**.



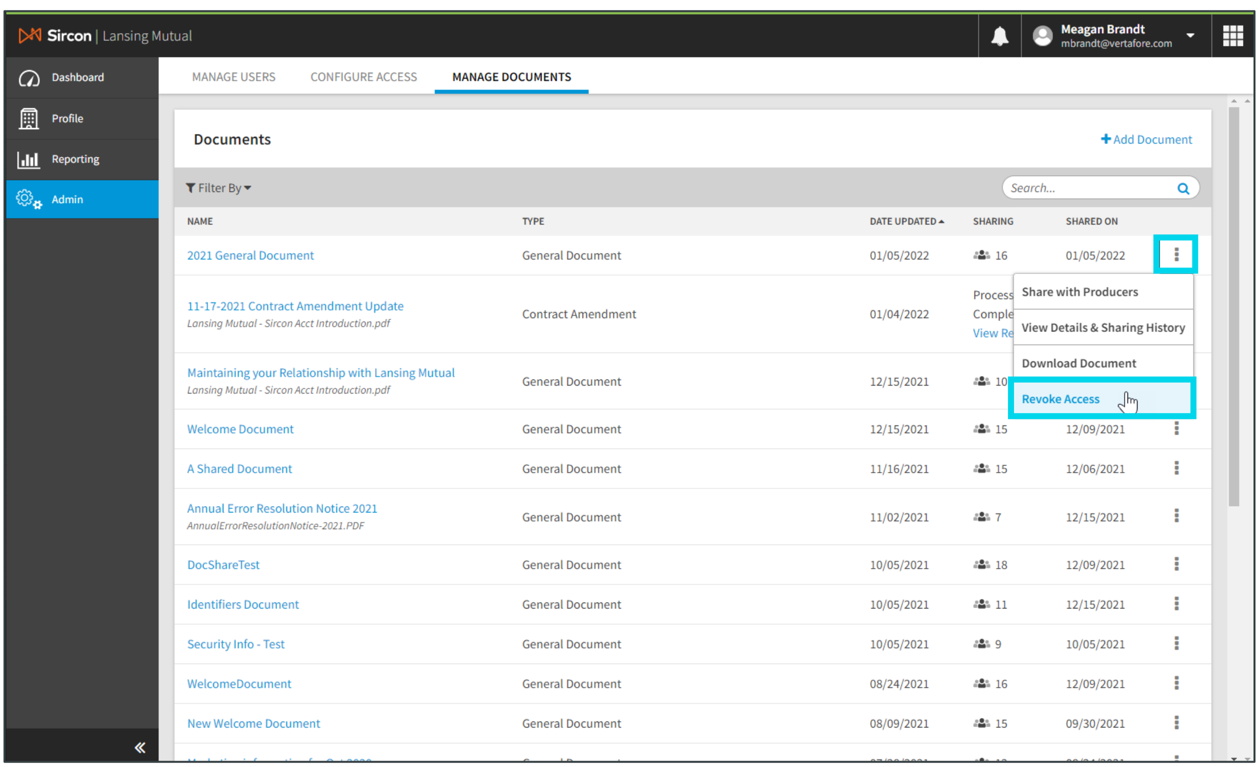
Section: Revoke Access to a Shared Document

2. This will take you to the new Sircon Producer Central dashboard. Under the **Admin** navigation, select **Manage Documents**.

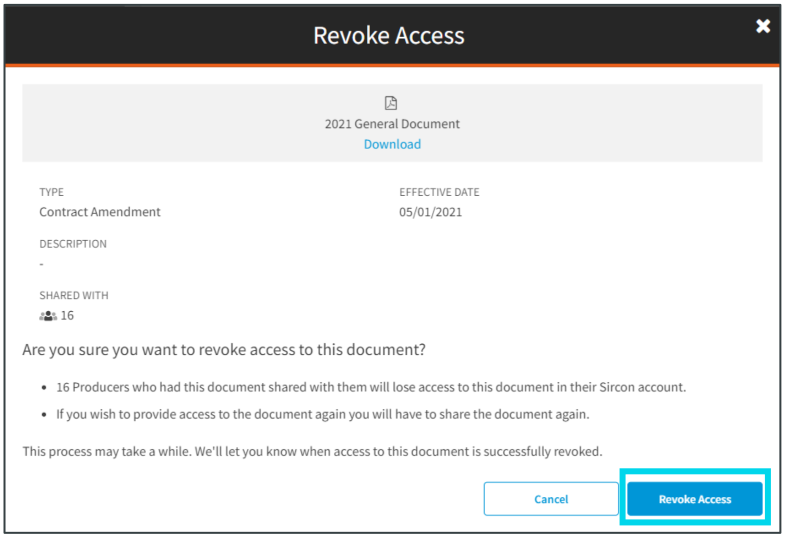


3. In the **Manage Documents** view, locate the document you wish to revoke access and select the **Revoke Access** option from the menu.

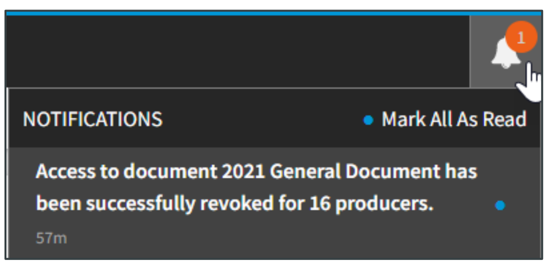
> **Note**: The **Revoke Access** option is only available for documents that have already been shared with at least one producer. It is not available if a bulk share is in the middle of processing.



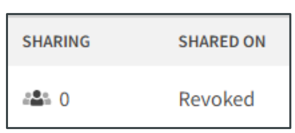
4. You will be asked to confirm that you wish to revoke access to all the producers who have access to this document. Click **Revoke Access**.



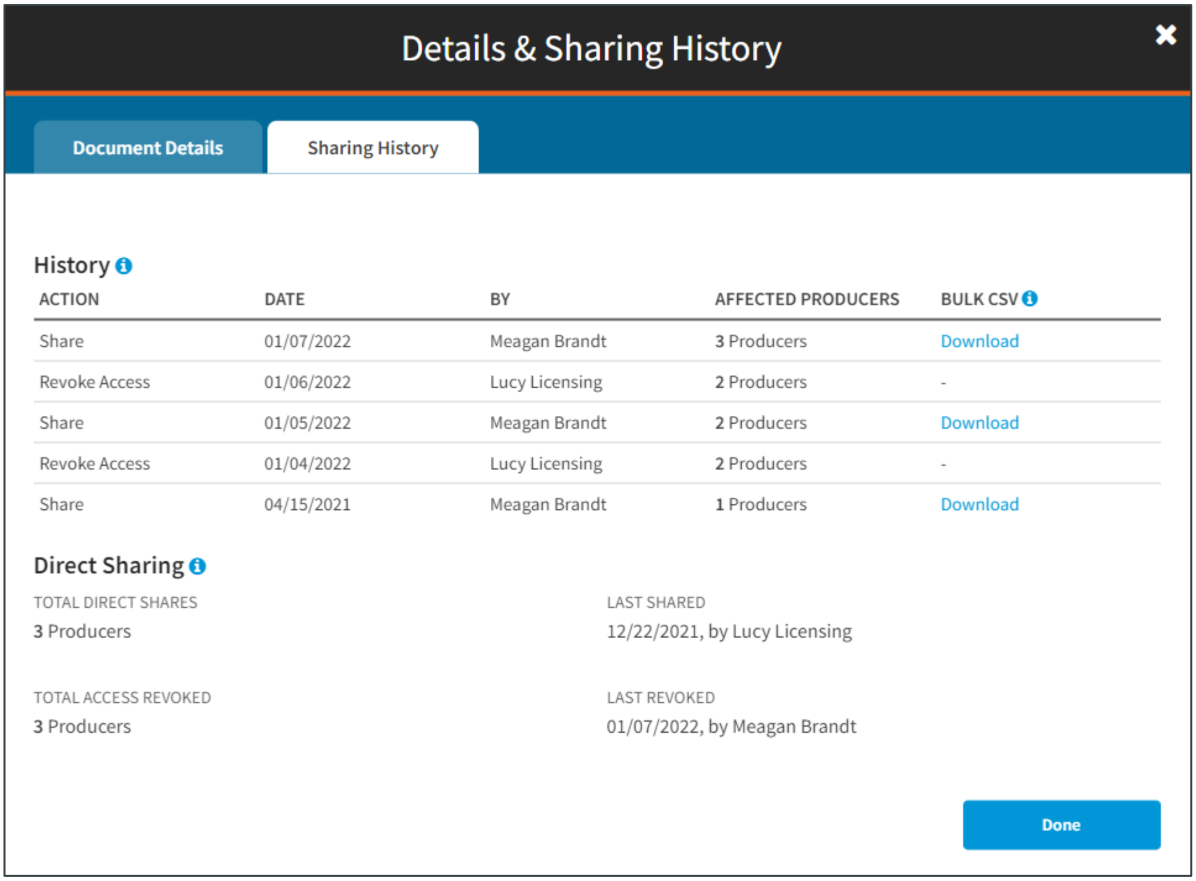
5. Once confirmed, it may take a few minutes for the revoke to complete. A notification is displayed when the process is done.



6. Once revoked, the document no longer appears on the agent's profile and is no longer available in the agent's Sircon account. The document is still available in **Manage Documents** with a **Shared On** status of **Revoked** and can be shared again if needed.



7. The **Sharing History** tab of the **View Details & Sharing History** dialog shows the history of shares and revoke actions.


Details & Sharing History

Document Details | Sharing History

History

ACTION	DATE	BY	AFFECTED PRODUCERS	BULK CSV
Share	01/07/2022	Meagan Brandt	3 Producers	Download
Revoke Access	01/06/2022	Lucy Licensing	2 Producers	-
Share	01/05/2022	Meagan Brandt	2 Producers	Download
Revoke Access	01/04/2022	Lucy Licensing	2 Producers	-
Share	04/15/2021	Meagan Brandt	1 Producers	Download

Direct Sharing

TOTAL DIRECT SHARES
3 Producers

LAST SHARED
12/22/2021, by Lucy Licensing

TOTAL ACCESS REVOKED
3 Producers

LAST REVOKED
01/07/2022, by Meagan Brandt

Done

APPENDIX 1: Sircon for Carriers Help Resources

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

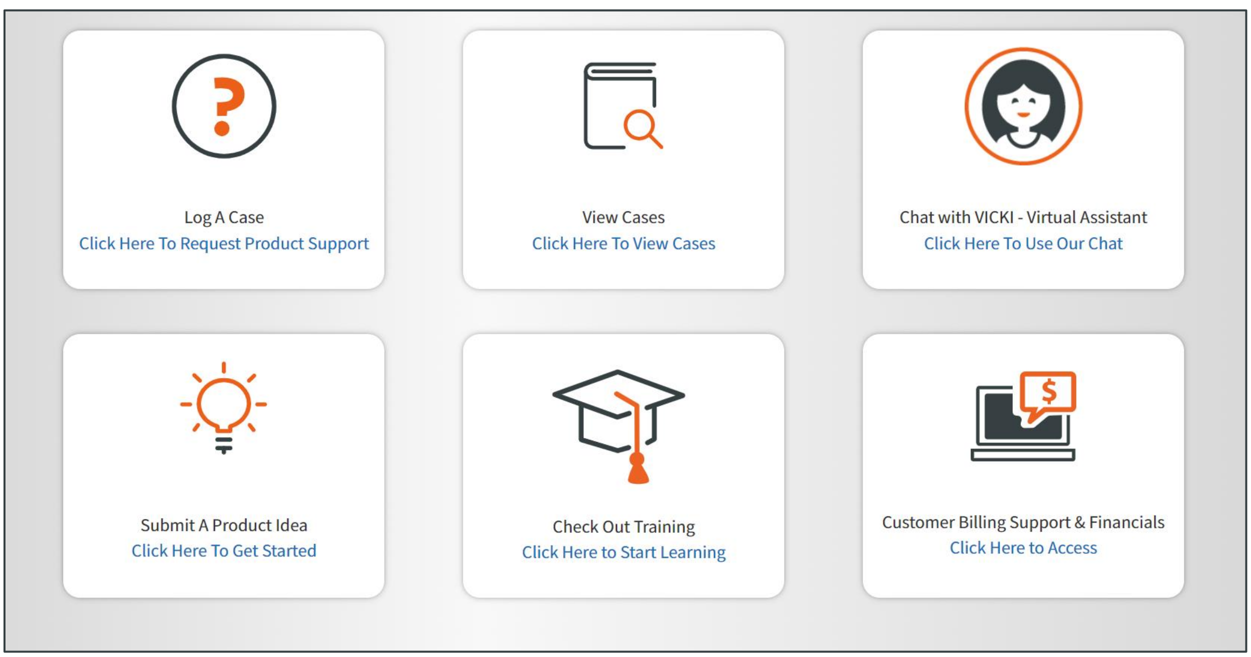
- My Vertafore
- Sircon Support

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	5/8/2023	Original Document

999 18th St | Denver, CO, 80202 | 877.876.4430| Vertafore.com