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# SIRCON FOR CARRIERS

## External System IDs

## Table of Contents

<b>Overview</b> .....	<b>2</b>
<i>Introduction and Background</i> .....	2
<i>What will be covered?</i> .....	3
<i>Who should use this document?</i> .....	3
<i>When should you use this document?</i> .....	3
<b>View External System IDs</b> .....	<b>4</b>
<b>Create External System IDs</b> .....	<b>6</b>
<i>Create External System IDs for a Single Producer</i> .....	6
<i>Create External System IDs for Multiple Producers</i> .....	8
Individual Producer Required Fields .....	10
Agency/Firm Required Fields .....	11
Optional Fields .....	12
<b>Edit External System IDs</b> .....	<b>15</b>
<b>Inactivate or Delete External System IDs</b> .....	<b>17</b>
<i>Inactivate External System IDs for a Single Producer</i> .....	17
<i>Delete an External System ID</i> .....	18
<i>Inactivate External System IDs for Multiple Producers</i> .....	19
Individual Producer Required Fields .....	21
Agency/Firm Required Fields .....	22
Optional Fields .....	23
<b>Configure External System Type Codes</b> .....	<b>27</b>
<i>View External System ID Codes</i> .....	27
<i>Edit External System ID Codes</i> .....	28
Add a New External System ID Code .....	29
Edit an Existing External System ID Code .....	31
Inactivate an External System ID Code .....	32
<b>APPENDIX 1: Sircon for Carriers Help Resources</b> .....	<b>35</b>
<i>My Vertafore</i> .....	35
<i>Contact Vertafore Customer Support</i> .....	35
<b>APPENDIX 2: Document History</b> .....	<b>36</b>

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## Overview

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### Introduction and Background

Many customers maintain other systems, such as new business, policy application, or compensation programs, that contain records related to the same producers that they are tracking in Producer Central.

To support integration between Producer Central and another system, you can record a producer's identifying code in the other system on the producer's record in Producer Central. This creates a data linkage between the systems.

Then, when a producer's information changes in Producer Central, the Outbound Data Feed can be used to automatically update the same producer's record in the downstream system.

**Note:** The Outbound Data Feed is only included if your version of Producer Central supports integrations with external systems.

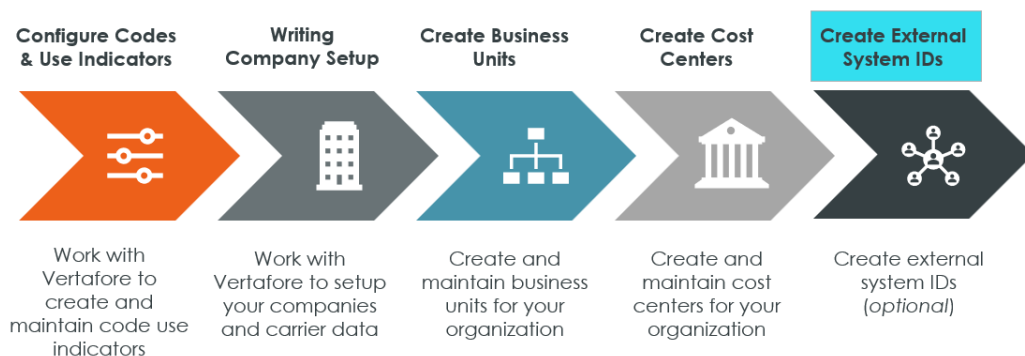
External System IDs also allow you to track your unique company data without linking Producer Central with an external system. This field is an optional field that you can use to display data specific to your company on the producer record.

Here are some common External System IDs used by Sircon customers:

- Agency Codes/Identification Numbers
- Agent Codes/Identification Numbers
- Entity Contact Codes
- Agent/Agency Region Codes

Maintaining External System IDs is an optional step in the Producer Lifecycle Management process and the initial Sircon Administration process.

### Initial Sircon Administration Process



Section: Overview

### **What will be covered?**

In this training, we will cover how to create, edit, and delete External System IDs for individual and firm producers.

### **Who should use this document?**

Any staff members that need to reference or manage External System IDs for producers.

### **When should you use this document?**

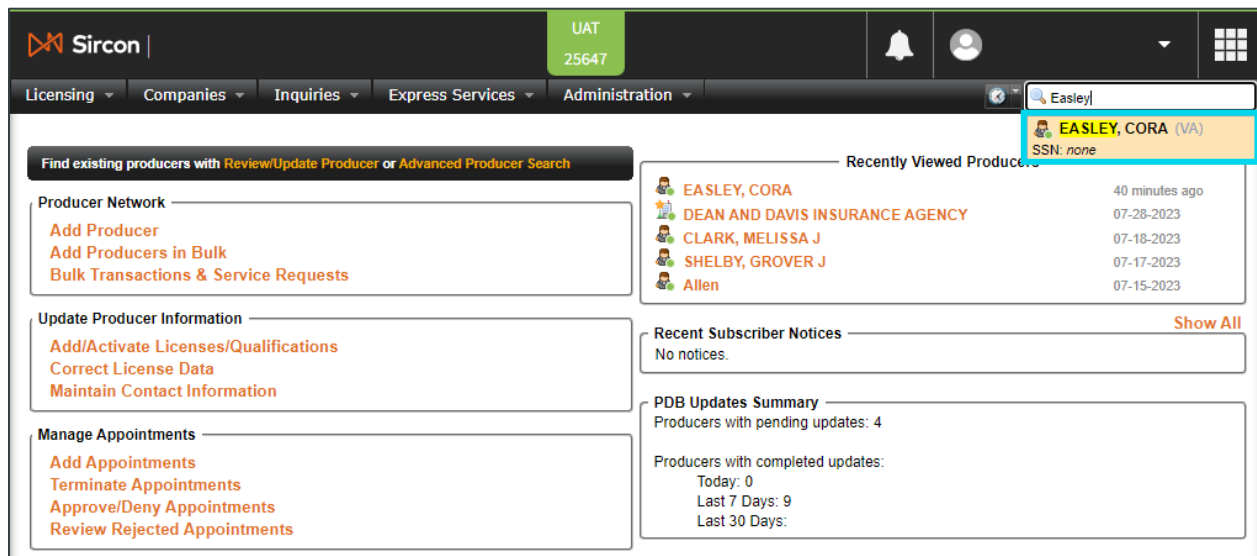
Use this document when you need to:

- View External System IDs
- Create a new External System ID
- Edit existing External System IDs
- Delete an External System ID

## View External System IDs

External System IDs are assigned to producers (both individual licensees and firms) and stored in the producer's record.

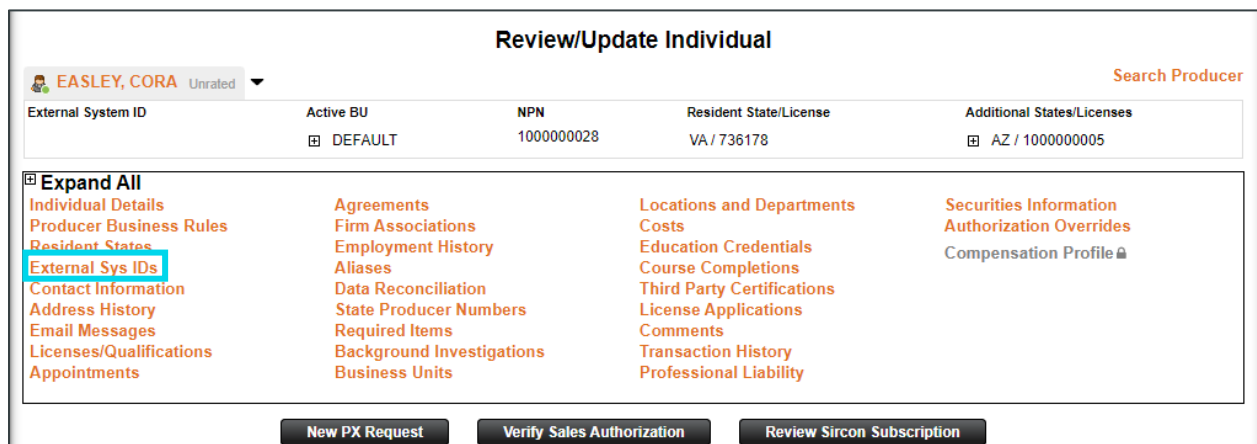
1. Begin typing search criteria (such as the last name of the producer, the agency/firm name, or the NPN, EIN, or SSN) in the **Producer Quick Search Box** found in the upper-right corner of any Producer Central page.
2. The list will update itself dynamically as you type. Select the **Producer** that you need to view.



The screenshot shows the Siron Producer Central interface. At the top, there is a navigation bar with the Siron logo, user information (UAT 25647), and a search bar containing 'Easley'. Below the navigation bar, there are several sections: 'Find existing producers with Review/Update Producer or Advanced Producer Search', 'Producer Network' (with links for Add Producer, Add Producers in Bulk, and Bulk Transactions & Service Requests), 'Update Producer Information' (with links for Add/Activate Licenses/Qualifications, Correct License Data, and Maintain Contact Information), 'Manage Appointments' (with links for Add Appointments, Terminate Appointments, Approve/Deny Appointments, and Review Rejected Appointments), 'Recently Viewed Producers' (listing EASLEY, CORA (VA) as the most recent, along with DEAN AND DAVIS INSURANCE AGENCY, CLARK, MELISSA J, SHELBY, GROVER J, and Allen), 'Recent Subscriber Notices' (showing no notices), and 'PDB Updates Summary' (showing 4 pending updates and 0 completed updates today).

**Note:** If you do not find the producer record from the quick search, refer to the **Adding and Searching for Producers** quick guide for more detailed instructions.

3. This will open the producer record.
4. Click **External Sys IDs** from the quick links.



The screenshot shows the 'Review/Update Individual' page for producer EASLEY, CORA. The page header includes the producer's name and a 'Search Producer' button. Below the header, there is a table with columns for External System ID, Active BU, NPN, Resident State/License, and Additional States/Licenses. The table contains one row with values: DEFAULT, 1000000028, VA / 736178, and AZ / 1000000005. Below the table, there is a grid of navigation links. The 'External Sys IDs' link is highlighted with a blue box. Other links include Individual Details, Producer Business Rules, Resident States, 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, and Authorization Overrides. At the bottom of the page, there are three buttons: 'New PX Request', 'Verify Sales Authorization', and 'Review Siron Subscription'.

## Section: View External System IDs

5. You can now see all the External System IDs assigned to the producer. The **External System IDs** data section includes the following fields:
- **External System Type:** Displays the type of system or connection referred to by the value of the External System Identifier field.
  - **External System Identifier:** Code value associated with the External System Type that links the selected producer record with another system or record.
  - **Business Unit:** Short Name and BU Name (in parentheses) of the business unit associated with the external system identifier or external system type.
  - **Primary:** Displays whether the external system identifier is regarded as a priority identifier of the producer in an external system or a producer grouping. A checkbox with a checkmark indicates a primary external system identifier; an empty checkbox indicates a non-primary external system identifier.
  - **Inactive:** Displays whether the external system identifier is active or inactive. A checkmark indicates an inactive External System ID; an empty checkbox indicates an active External System ID.

<input type="checkbox"/> <b>Producer Business Rules</b> <span style="float: right;">Top</span>				
<input type="checkbox"/> <b>Resident States</b> <span style="float: right;">Top</span>				
<input type="checkbox"/> <b>External Sys IDs</b> <span style="float: right;">Top</span>				
External System Type	External System Identifier	Business Unit	Primary	Inactive
Distribution Code	1934	PC (Personal / Commercial)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Add/Update/Delete External System Identifiers</a>				
<input type="checkbox"/> <b>Contact Information</b> <span style="float: right;">Top</span>				

## Create External System IDs

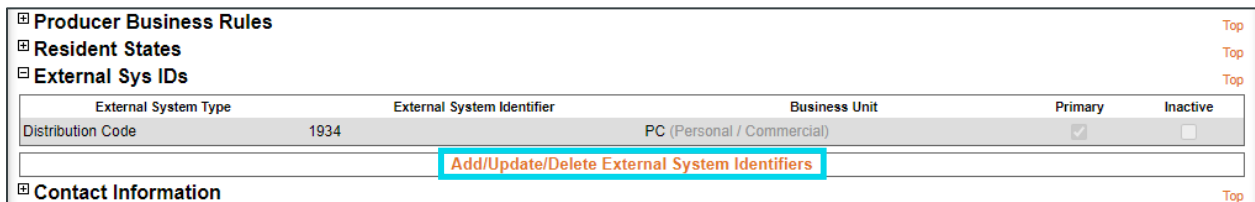
In this section, we will review how to create External System IDs. There are two different ways to create External System IDs in Producer Central:

- Create External System IDs for a Single Producer from the Producer Record
- Create External System IDs for Multiple Producers using Bulk Transactions

### Create External System IDs for a Single Producer

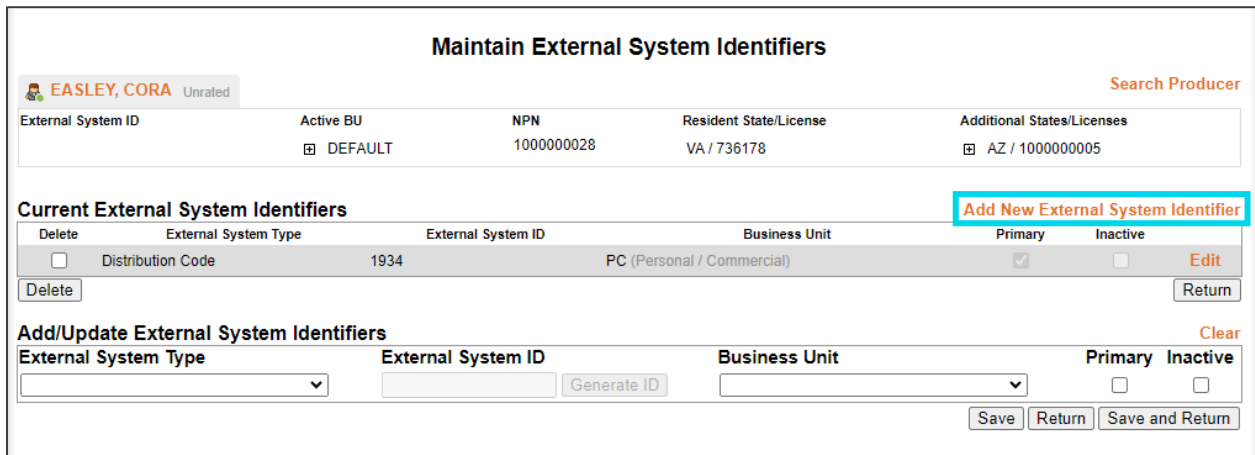
Follow these steps to add a new External System ID for a single producer from within the producer record.

1. To add an external system ID, click the **Add/Update/Delete External System Identifiers** button.



The screenshot shows the 'Producer Business Rules' section of a producer record. Under the 'External Sys IDs' sub-section, there is a table with columns: External System Type, External System Identifier, Business Unit, Primary, and Inactive. A row is visible with 'Distribution Code' as the type, '1934' as the identifier, and 'PC (Personal / Commercial)' as the business unit. Below this table, the 'Add/Update/Delete External System Identifiers' button is highlighted with a blue box.

2. This will open the *Maintain External System Identifiers* page.
3. Click the **Add New External System Identifier** button.



The screenshot shows the 'Maintain External System Identifiers' page for producer 'EASLEY, CORA'. It displays producer details like 'Active BU' (DEFAULT), 'NPN' (1000000028), and 'Resident State/License' (VA / 736178). Below this, there is a table of 'Current External System Identifiers' with columns for Delete, External System Type, External System ID, Business Unit, Primary, and Inactive. A row is shown with 'Distribution Code' as the type and '1934' as the ID. The 'Add New External System Identifier' button is highlighted in blue. At the bottom, there is an 'Add/Update External System Identifiers' section with dropdown menus for 'External System Type' and 'Business Unit', a 'Generate ID' button, and checkboxes for 'Primary' and 'Inactive'. There are also 'Save', 'Return', and 'Save and Return' buttons.

4. In the *Add/Update External System Identifiers* section, update the following fields:
  - **External System Type:** The type of system or connection referred to by the value of the External System Identifier field.

**Note:** Administrators can add or update the External System Type by following steps in the [Configure External System ID Codes](#) section of this quick guide.

Section: Create External System IDs

- **External System ID:** Once you select the External System Type, you can edit the External System ID. You can either type the External System ID or click the **Generate ID** button.
  - **Business Unit:** The short name of the business unit associated with the External System ID. The business unit is optional.
  - **Primary or Inactive** Checkboxes:
    - Click the **Primary** check box to make the External System ID the main ID.
    - Click the **Inactive** check box to make the External System ID inactive.
5. Click **Save** to save and stay on the same page to continue making changes. Click **Return** to return to the producer record without saving. Click **Save & Return** to save the information and return to the producer record.

### Maintain External System Identifiers

Search Producer

**EASLEY, CORA** Unrated

External System ID	Active BU DEFAULT	NPN 1000000028	Resident State/License VA / 736178	Additional States/Licenses AZ / 1000000005
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**Current External System Identifiers** Add New External System Identifier

Delete	External System Type	External System ID	Business Unit	Primary	Inactive	
<input type="checkbox"/>	Distribution Code	1934	PC (Personal / Commercial)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit

Delete Return

**Add/Update External System Identifiers** Clear

External System Type Agency Code	External System ID SF101 <span style="font-size: small;">Generate ID</span>	Business Unit DEFAULT (DEFAULT)	Primary <input type="checkbox"/> Inactive <input type="checkbox"/>
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Save Return Save and Return

6. The External System ID will be added to the producer record.

### Maintain External System Identifiers

Search Producer

**EASLEY, CORA** Unrated

External System ID	Active BU DEFAULT	NPN 1000000028	Resident State/License VA / 736178	Additional States/Licenses AZ / 1000000005
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**Current External System Identifiers** Add New External System Identifier

Delete	External System Type	External System ID	Business Unit	Primary	Inactive	
<input type="checkbox"/>	Agency Code	SF101	DEFAULT (DEFAULT)	<input type="checkbox"/>	<input type="checkbox"/>	Edit
<input type="checkbox"/>	Distribution Code	1934	PC (Personal / Commercial)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit

Delete Return

**Add/Update External System Identifiers** Clear

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

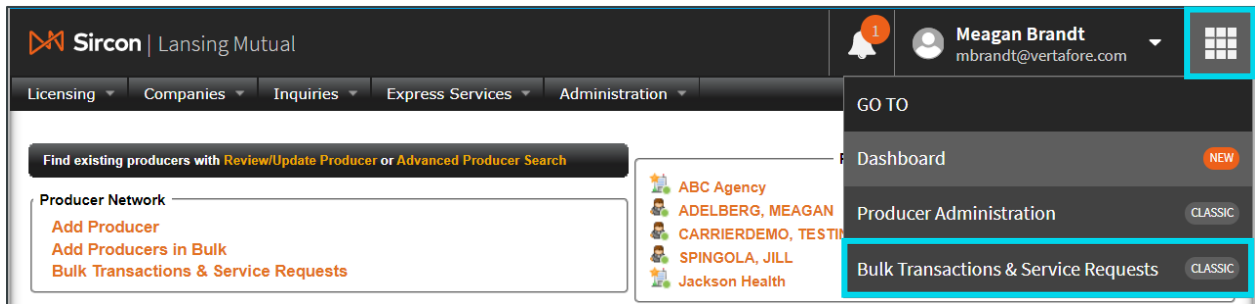


Section: Create External System IDs

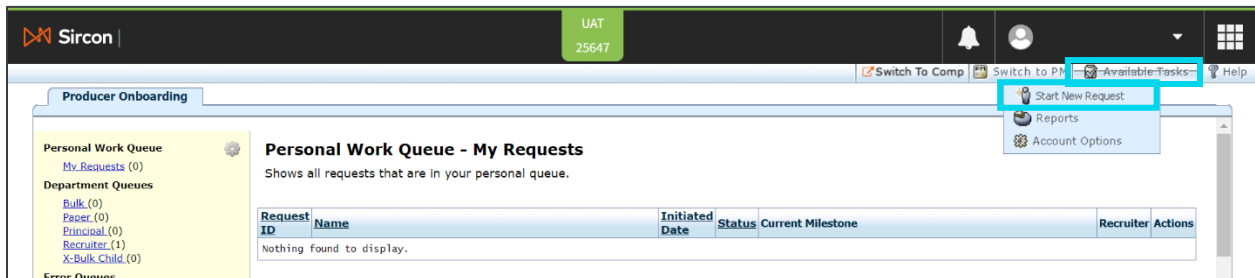
## Create External System IDs for Multiple Producers

Use the **External System ID** bulk transaction to add new external system IDs to a batch of producer records in Producer Central.

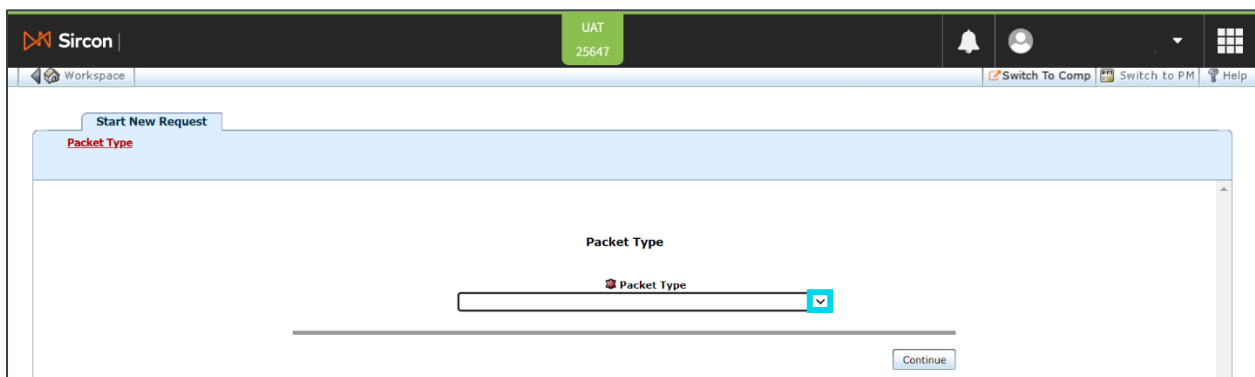
1. Use the **Application Switcher** in the upper right-hand corner to move from **Producer Administration** (also known as Producer Central) to the **Bulk Transactions and Service Requests**.



2. You will now see the *Bulk Transactions & Services Requests* home screen. In the top right-hand corner of the screen, click the **Available Tasks** button.
3. Click **Start New Request**.

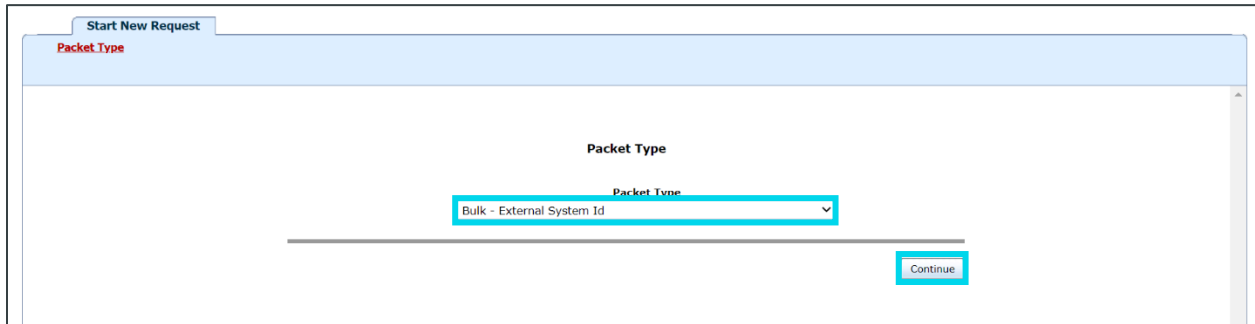


4. Click the dropdown arrow next to the **Packet Type**. The packet type determines the type of bulk transaction you need to perform.



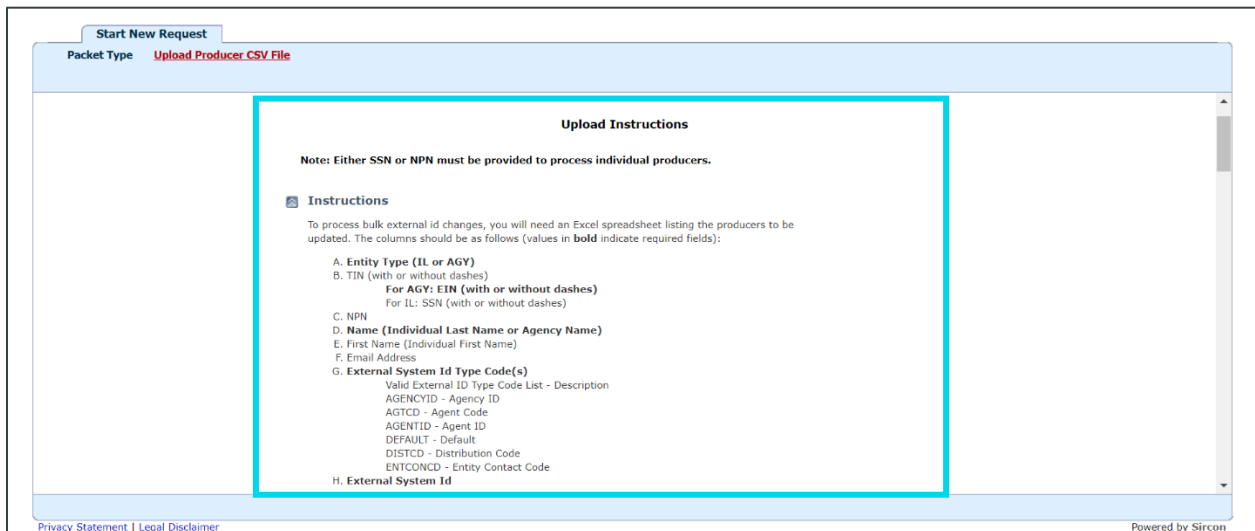
## Section: Create External System IDs

2. Select the **Bulk – External System ID** packet type. Click **Continue**.



The screenshot shows a web interface titled "Start New Request". At the top, there is a "Packet Type" dropdown menu. The selected option is "Bulk - External System Id". Below the dropdown is a "Continue" button.

3. You will now see the **Upload Instructions** to properly format the bulk update file.
4. To create the file, start by creating a spreadsheet using a program like Excel or Google Sheets.
5. The letters A-H represent the column headers in the file. The fields in **bold** are required fields.
6. Depending on the **Entity Type** (Individual or Agency), the required fields will change.



The screenshot shows the "Upload Instructions" screen. It includes a note: "Note: Either SSN or NPN must be provided to process individual producers." Below this is a section titled "Instructions" with the following text: "To process bulk external id changes, you will need an Excel spreadsheet listing the producers to be updated. The columns should be as follows (values in **bold** indicate required fields):"

- A. **Entity Type (IL or AGY)**
- B. TIN (with or without dashes)  
For AGY: **EIN (with or without dashes)**  
For IL: SSN (with or without dashes)
- C. NPN
- D. **Name (Individual Last Name or Agency Name)**
- E. First Name (Individual First Name)
- F. Email Address
- G. **External System Id Type Code(s)**  
Valid External ID Type Code List - Description  
AGENCYCD - Agency ID  
AGTCOD - Agent Code  
AGENTID - Agent ID  
DEFAULT - Default  
DISTCD - Distribution Code  
ENTCONCD - Entity Contact Code
- H. **External System Id**

At the bottom of the screen, there is a "Privacy Statement | Legal Disclaimer" link on the left and "Powered by Sircion" on the right.

**Note:** The Upload Instructions screen will display the standard ESID Type Codes found in all new implementations (AGENCYCD, AGENTID, etc.)

If the carrier adds custom **ESID Type Codes** (Under Administration > Configure System > Maintain Codes), your system administrator will need to report the newly added Codes to a case in My Vertafore, requesting Vertafore to add the External System ID Type Codes to their *Upload Instructions* Screen.

## Section: Create External System IDs

## INDIVIDUAL PRODUCER REQUIRED FIELDS

Either an **SSN** or an **NPN** must be provided to process individual producers. Depending on your business setup, your organization may or may not maintain SSNs, or Social Security numbers. If you do not use SSNs, the NPNs, or National Producer Numbers, are required.

If the individual licensee has an NPN number, the required fields are:

Column	Field Name	Description
<b>A</b>	<b>Entity Type</b>	Use " <b>IL</b> " to indicate individual licensee
<b>C</b>	<b>National Producer ID (NPN)</b>	Type the full <b>NPN</b> number of the producer
<b>D</b>	<b>Name</b>	Type the <b>Last Name</b> of the producer
<b>G</b>	<b>External System ID Type Codes</b>	Enter the External System ID Type Codes. The standard codes are listed below; however, you may have custom codes maintained for your business: <ul style="list-style-type: none"> <li>Type <b>AGENCYID</b> for Agency ID</li> <li>Type <b>AGTCD</b> for Agent Code</li> <li>Type <b>AGENTID</b> for Agent ID</li> <li>Type <b>DEFAULT</b> for Default</li> <li>Type <b>DISTCD</b> for Distribution Code</li> <li>Type <b>ENTCONCD</b> for Entity Contact Code</li> </ul>
<b>H</b>	<b>External System ID</b>	Type the producer's <b>External System ID</b>

**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
<b>Entity Type</b>	<b>TIN</b>	<b>NPN</b>	<b>Name</b>	<b>First Name</b>	<b>Email Address</b>	<b>External System ID Type Codes</b>	<b>External System ID</b>
IL		1000000028	Easley			AGENTID	5234897

If the individual licensee has a **Social Security Number** (or **SSN**), the required fields are:

Column	Field Name	Description
<b>A</b>	<b>Entity Type</b>	Use " <b>IL</b> " to indicate individual licensee
<b>B</b>	<b>TIN (Taxpayer ID)</b>	Type the 9-digit <b>SSN</b> of the producer (with or without dashes)
<b>D</b>	<b>Name</b>	Type the <b>Last Name</b> of the producer
<b>G</b>	<b>External System ID Type Codes</b>	Enter the External System ID Type Codes. The standard codes are listed below; however, you may have custom codes maintained for your business: <ul style="list-style-type: none"> <li>Type <b>AGENCYID</b> for Agency ID</li> <li>Type <b>AGTCD</b> for Agent Code</li> <li>Type <b>AGENTID</b> for Agent ID</li> <li>Type <b>DEFAULT</b> for Default</li> <li>Type <b>DISTCD</b> for Distribution Code</li> <li>Type <b>ENTCONCD</b> for Entity Contact Code</li> </ul>

## Section: Create External System IDs

		<ul style="list-style-type: none"> <li>Type <b>AGENCYID</b> for Agency ID</li> <li>Type <b>AGTCD</b> for Agent Code</li> <li>Type <b>AGENTID</b> for Agent ID</li> <li>Type <b>DEFAULT</b> for Default</li> <li>Type <b>DISTCD</b> for Distribution Code</li> <li>Type <b>ENTCONCD</b> for Entity Contact Code</li> </ul>
<b>H</b>	<b>External System ID</b>	Type the producer's <b>External System ID</b>

**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
<b>Entity Type</b>	<b>TIN</b>	<b>NPN</b>	<b>Name</b>	<b>First Name</b>	<b>Email Address</b>	<b>External System ID Type Codes</b>	<b>External System ID</b>
IL	000999123		Charron			DISTCD	NW-WA

## AGENCY/FIRM REQUIRED FIELDS

The required fields for agencies or firms are:

Column	Field Name	Description
<b>A</b>	<b>Entity Type</b>	Use " <b>AGY</b> " to indicate an agency/firm
<b>B</b>	<b>TIN</b> (Taxpayer ID)	Type the 9-digit Employer Identification Number or <b>EIN</b> of the firm (with or without dashes)
<b>D</b>	<b>Name</b>	Type the full <b>Name</b> of the agency/firm. It must match the name in the producer record.
<b>G</b>	<b>External System ID Type Codes</b>	Enter the External System ID Type Codes. The standard codes are listed below; however, you may have custom codes maintained for your business: <ul style="list-style-type: none"> <li>Type <b>AGENCYID</b> for Agency ID</li> <li>Type <b>AGTCD</b> for Agent Code</li> <li>Type <b>AGENTID</b> for Agent ID</li> <li>Type <b>DEFAULT</b> for Default</li> <li>Type <b>DISTCD</b> for Distribution Code</li> <li>Type <b>ENTCONCD</b> for Entity Contact Code</li> </ul>
<b>H</b>	<b>External System ID</b>	Type the producer's <b>External System ID</b>

**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
<b>Entity Type</b>	<b>TIN</b>	<b>NPN</b>	<b>Name</b>	<b>First Name</b>	<b>Email Address</b>	<b>External System ID Type Codes</b>	<b>External System ID</b>
AGY	00-6233077		Dean and Davis Insurance Agency			AGENCYID	8253

## Section: Create External System IDs

## OPTIONAL FIELDS

The table below lists all the optional fields you can include in the file.

**Note:** The required fields listed above are mandatory to complete the Bulk Connection update.

It is 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
<b>B</b>	<b>TIN</b> (Taxpayer ID)	For individual licenses with an <b>NPN</b> number, the Social Security Number, or <b>SSN</b> , is an optional field.
<b>C</b>	<b>NPN</b> (National Producer Number)	For individual licensees with a SSN number, the National Producer Number, or <b>NPN</b> , is optional. The <b>NPN</b> is also optional for agencies/firms.
<b>E</b>	<b>First Name</b>	For individual licensees, you can include the <b>First Name</b> of the producer.
<b>F</b>	<b>Email Address</b>	Type the <b>Email Address</b> associated with the producer.

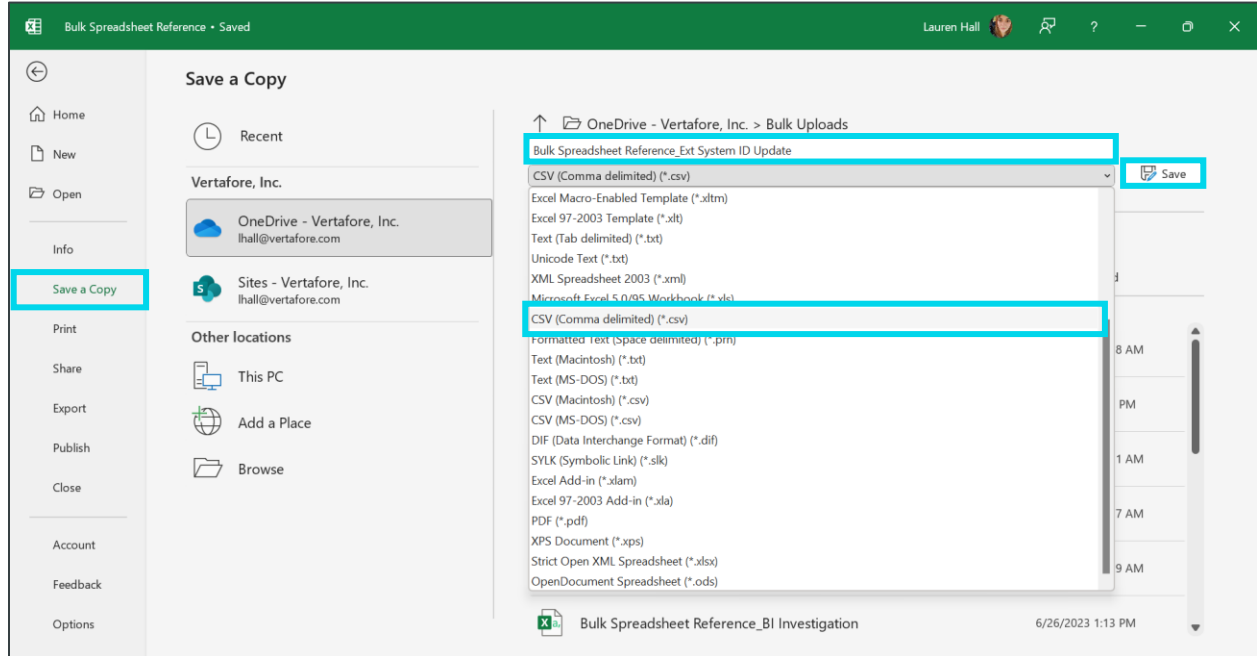
7. Add the required information to your spreadsheet. When you are finished, you should have a spreadsheet that looks something like the following illustration:

A	B	C	D	E	F	G	H
AGY	00-6233077		Dean and Davis Insurance Agency			AGENCYID	8253
IL	000999123		Charron			DISTCD	NW-WA
IL		1000000028	Easley			AGENTID	5234897

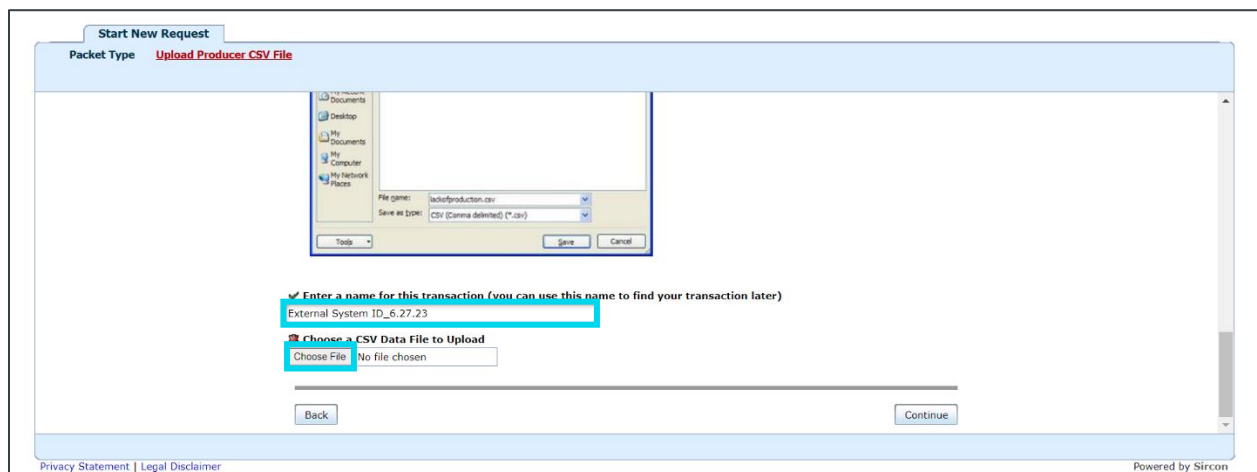
**Note:** If you inserted a header row containing the field names to guide your data entry, you must **delete the header** before moving on to the next step.

8. When you are finished, from the **File** menu, select **Save As**.
9. 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.
10. Click **Save**.

## Section: Create External System IDs

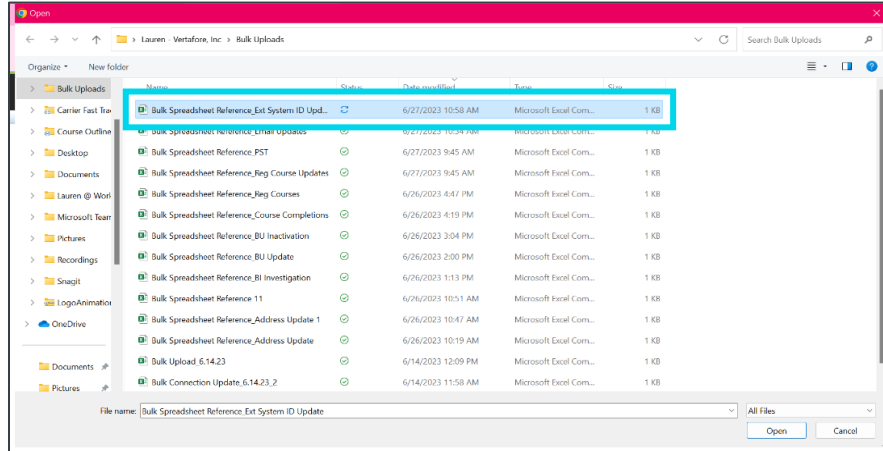


11. Your file is now saved in a comma-separated format and is ready for upload to the system.
12. Return to the application and scroll down to the bottom of the screen. **Enter the name of this transaction** in the box. This name will be visible to everyone in your organization.
13. Click the **Choose File** button.

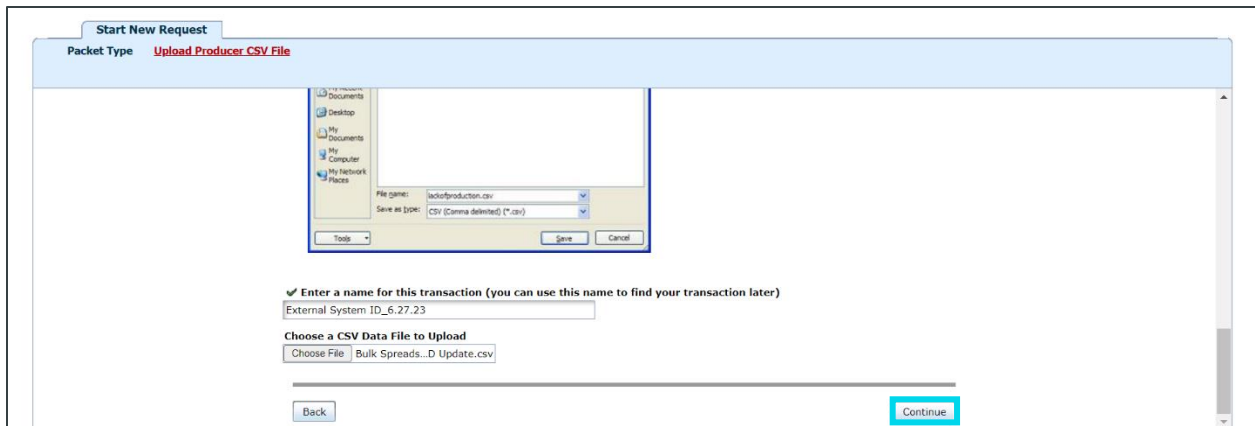


14. Use the navigation options on the **Choose File** dialog box to locate the upload file (\*.csv) on your system.
15. When the correct file name appears in the **File Name** field, click the **Open** button.

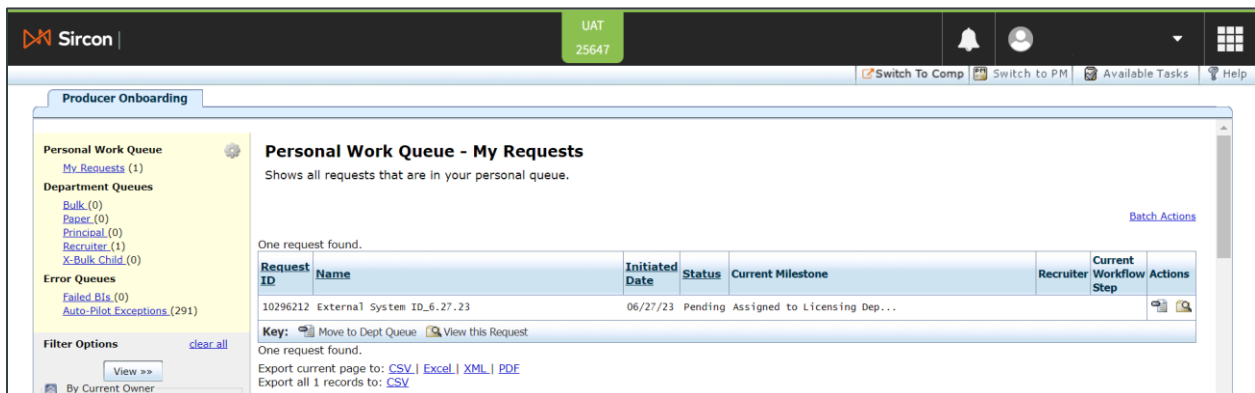
## Section: Create External System IDs



16. The file name will appear next to the **Choose File** button.
17. Click **Continue** to submit the file.



18. The bulk transaction will be assigned to your queue and will begin processing.



**Note:** Refer to the Bulk Transactions and Service Requests quick guide for detailed instructions on troubleshooting bulk transaction failures.

## Edit External System IDs

Use this option to assign an existing external system ID to a different business unit. You can also inactivate an external system ID or make an existing ID the primary ID.


In order to preserve records, you cannot edit the **External System Type** or the actual **External System ID**. If you need to edit anything other than the business unit, you will need to add new external system ID.

1. Navigate to the Producer's producer record.
2. Click **External System ID** from the quick links.
3. To add an external system ID, click the **Add/Update/Delete External System Identifiers** button.

<span>☐</span> <b>Producer Business Rules</b> <span style="float: right;">Top</span>				
<span>☐</span> <b>Resident States</b> <span style="float: right;">Top</span>				
<span>☐</span> <b>External Sys IDs</b> <span style="float: right;">Top</span>				
External System Type	External System Identifier	Business Unit	Primary	Inactive
Distribution Code	1934	PC (Personal / Commercial)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<span style="border: 1px solid orange; padding: 2px;">Add/Update/Delete External System Identifiers</span>				
<span>☐</span> <b>Contact Information</b> <span style="float: right;">Top</span>				

4. Click the **Edit** button next to the external system ID you need to modify.

### Maintain External System Identifiers

 **EASLEY, CORA** Unrated
Search Producer

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

**Current External System Identifiers** Add New External System Identifier

Delete	External System Type	External System ID	Business Unit	Primary	Inactive	
<input type="checkbox"/>	Agency Code	SF101	DEFAULT (DEFAULT)	<input type="checkbox"/>	<input type="checkbox"/>	<b>Edit</b>
<input type="checkbox"/>	Distribution Code	1934	PC (Personal / Commercial)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<b>Edit</b>

Delete Return

**Add/Update External System Identifiers** Clear

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

Save Return Save and Return


5. You cannot edit the **External System Type** or the **External System ID**. You can edit the following fields:
  - **Business Unit:** The short name of the business unit associated with the External System ID.
  - **Primary** or **Inactive** Checkboxes:
    - Click the **Primary** check box to make the External System ID the main ID.
    - Click the **Inactive** check box to make the External System ID inactive.



Section: Edit External System IDs

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

### Maintain External System Identifiers


[Search Producer](#)

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

#### Current External System Identifiers

[Add New External System Identifier](#)

Delete	External System Type	External System ID	Business Unit	Primary	Inactive	
<input type="checkbox"/>	Agency Code	SF101	DEFAULT (DEFAULT)	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Edit</a>
<input type="checkbox"/>	Distribution Code	1934	PC (Personal / Commercial)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Edit</a>


#### Add/Update External System Identifiers

[Clear](#)

External System Type	External System ID	Business Unit	Primary	Inactive
<input type="text" value="Distribution Code"/>	<input type="text" value="1934"/> <input type="button" value="Generate ID"/>	<input type="text" value="LIFE (Life and Annuity)"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- The External System ID will update and appear on the producer record.

### Maintain External System Identifiers


[Search Producer](#)

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

#### Current External System Identifiers

[Add New External System Identifier](#)

Delete	External System Type	External System ID	Business Unit	Primary	Inactive	
<input type="checkbox"/>	Agency Code	SF101	DEFAULT (DEFAULT)	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Edit</a>
<input type="checkbox"/>	Distribution Code	1934	LIFE (Life and Annuity)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Edit</a>

#### Add/Update External System Identifiers

[Clear](#)

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

## Inactivate or Delete External System IDs

There are two different ways to remove External System IDs from the producer record:

- **Inactivate IDs** – When you inactivate External System IDs, the IDs will still appear on the producer record as inactive.
- **Delete IDs** – When you delete External System IDs, the IDs are removed from the producer record and are no longer active in Producer Central.

### Inactivate External System IDs for a Single Producer


Follow this process to inactivate External System IDs for a single producer.

1. Navigate to the Producer's producer record.
2. Click **External System ID** from the quick links.
3. To add an external system ID, click the **Add/Update/Delete External System Identifiers** button.

<input type="checkbox"/> <b>Producer Business Rules</b> <span style="float: right;">Top</span>				
<input type="checkbox"/> <b>Resident States</b> <span style="float: right;">Top</span>				
<input type="checkbox"/> <b>External Sys IDs</b> <span style="float: right;">Top</span>				
External System Type	External System Identifier	Business Unit	Primary	Inactive
Distribution Code	1934	PC (Personal / Commercial)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#" style="border: 1px solid orange; padding: 2px;">Add/Update/Delete External System Identifiers</a>				
<input type="checkbox"/> <b>Contact Information</b> <span style="float: right;">Top</span>				

4. Click **Edit** next to the External System IDs you want to inactivate.
5. Click the **Inactive** checkbox then click **Save**.

### Maintain External System Identifiers

 **EASLEY, CORA** Unrated
Search Producer

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

**Current External System Identifiers** Add New External System Identifier

Delete	External System Type	External System ID	Business Unit	Primary	Inactive	
<input type="checkbox"/>	Agency Code	SF101	DEFAULT (DEFAULT)	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#" style="border: 1px solid orange; padding: 2px;">Edit</a>
<input type="checkbox"/>	Distribution Code	1934	LIFE (Life and Annuity)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#" style="border: 1px solid orange; padding: 2px;">Edit</a>


**Add/Update External System Identifiers** Clear

External System Type	External System ID	Business Unit	Primary	Inactive
Distribution Code	1934 <input type="button" value="Generate ID"/>	LIFE (Life and Annuity)	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Section: Inactivate or Delete External System IDs

- The External System ID will be updated in the system.

### Maintain External System Identifiers


Search Producer

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

**Current External System Identifiers**
Add New External System Identifier

Delete	External System Type	External System ID	Business Unit	Primary	Inactive	
<input type="checkbox"/>	Agency Code	SF101	DEFAULT (DEFAULT)	<input type="checkbox"/>	<input type="checkbox"/>	Edit
<input type="checkbox"/>	Distribution Code	1934	LIFE (Life and Annuity)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit

Delete
Return

**Add/Update External System Identifiers**
Clear

External System Type	External System ID	Business Unit	Primary	Inactive	
<input type="text"/>	<input type="text"/> <span style="font-size: small;">Generate ID</span>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	


Save Return Save and Return

## Delete an External System ID

Deleting External System IDs will remove the ID from the producer record and Producer Central.

- From the *Maintain External System Identifiers* page, click the checkmark next to the ID you want to remove then click **Delete**.

### Maintain External System Identifiers


Search Producer

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

**Current External System Identifiers**
Add New External System Identifier

Delete	External System Type	External System ID	Business Unit	Primary	Inactive	
<input type="checkbox"/>	Agency Code	SF101	DEFAULT (DEFAULT)	<input type="checkbox"/>	<input type="checkbox"/>	Edit
<input checked="" type="checkbox"/>	Distribution Code	1934	LIFE (Life and Annuity)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit

Delete
Return

**Add/Update External System Identifiers**
Clear

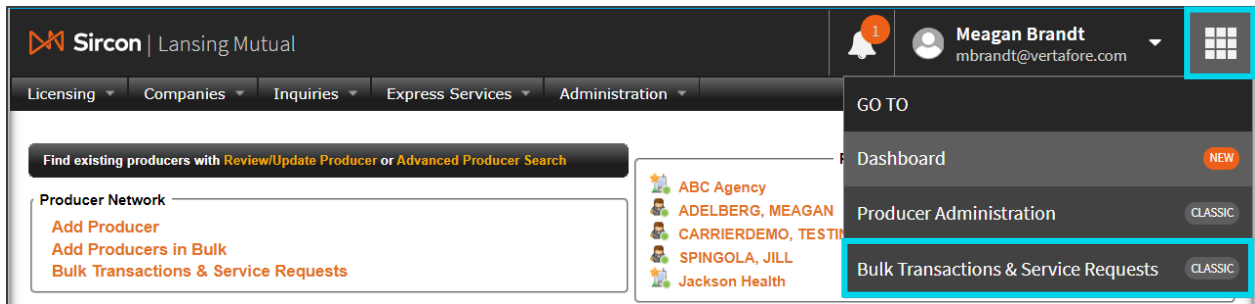
External System Type	External System ID	Business Unit	Primary	Inactive	
<input type="text"/>	<input type="text"/> <span style="font-size: small;">Generate ID</span>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Save Return Save and Return

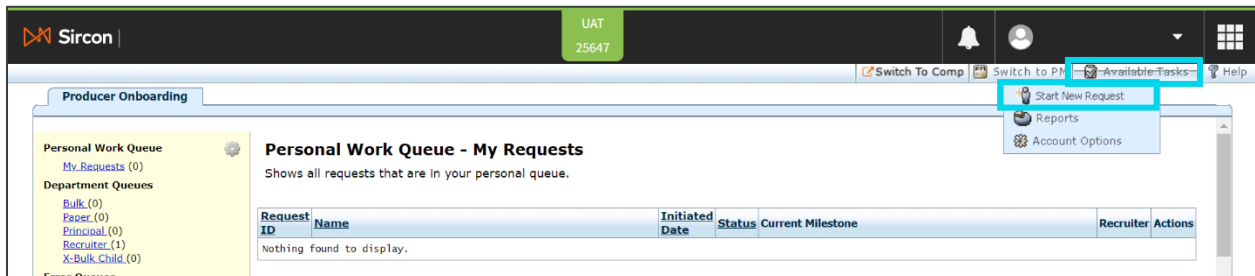
## Inactivate External System IDs for Multiple Producers

Use the **External System ID** bulk transaction to inactivate existing external system IDs for a batch of producer records in Producer Central.

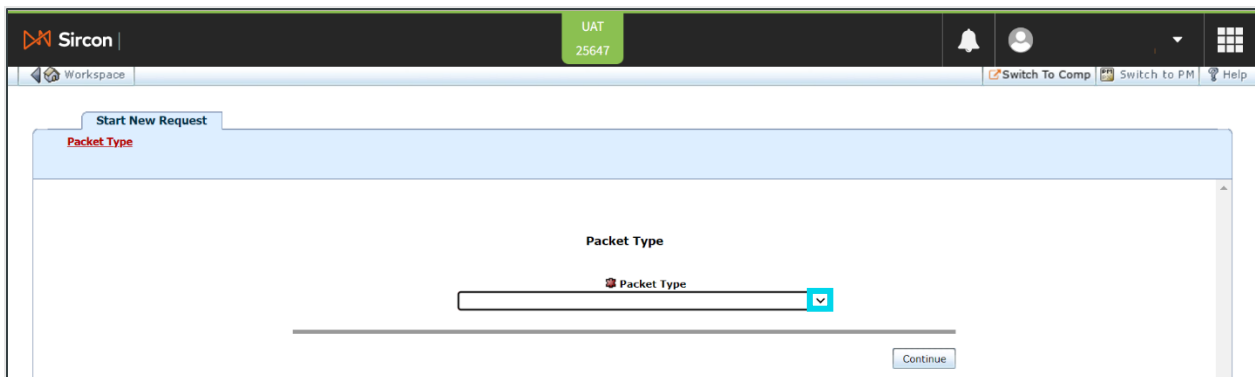
1. Use the **Application Switcher** in the upper right-hand corner to move from **Producer Administration** (also known as Producer Central) to the **Bulk Transactions and Service Requests**.



2. You will now see the *Bulk Transactions & Services Requests* home screen. In the top right-hand corner of the screen, click the **Available Tasks** button.
3. Click **Start New Request**.

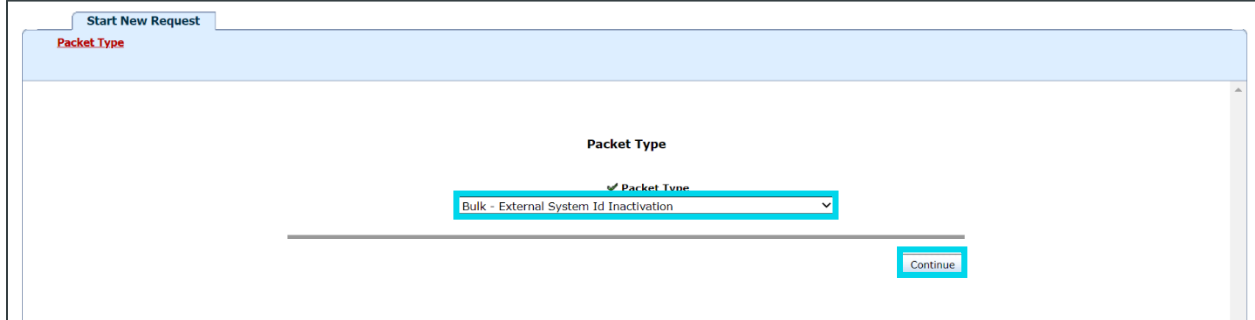


4. Click the dropdown arrow next to the **Packet Type**. The packet type determines the type of bulk transaction you need to perform.



5. Select the **Bulk – External System ID Inactivation** packet type.
6. Click **Continue**.

## Section: Inactivate or Delete External System IDs



Start New Request

Packet Type

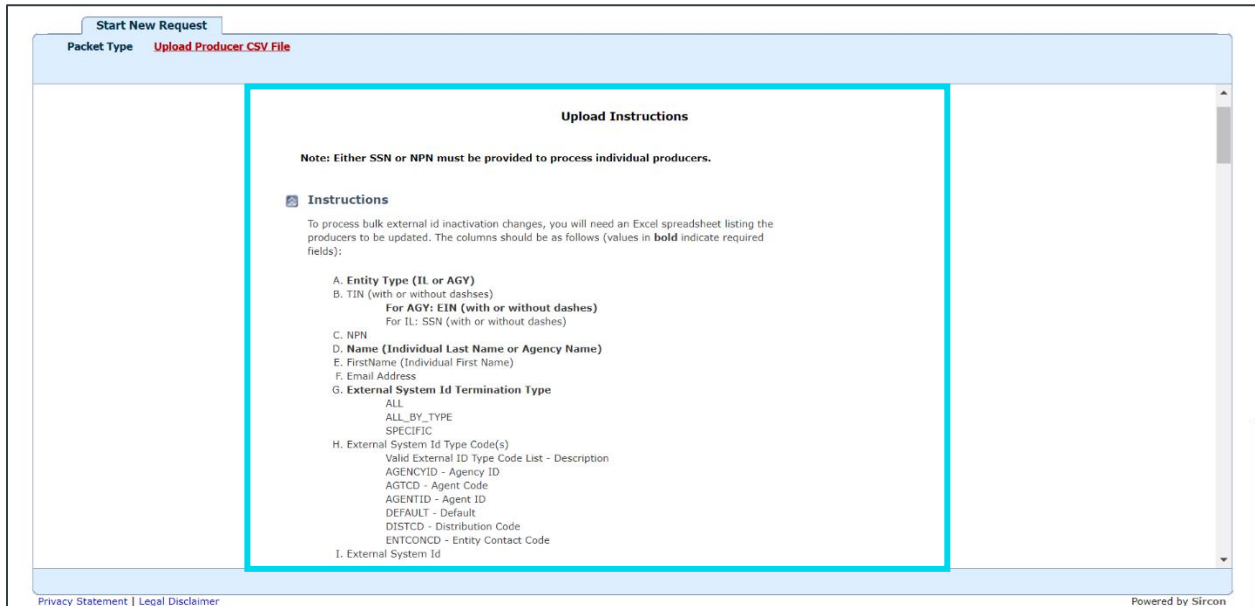
Packet Type

✓ Packet Type

Bulk - External System Id Inactivation

Continue

7. You will now see the **Upload Instructions** to properly format the bulk update file.
8. To create the file, start by creating a spreadsheet using a program like Excel or Google Sheets.
9. The letters A-I represent the column headers in the file. The fields in **bold** are required fields.
10. Depending on the **Entity Type** (Individual or Agency), the required fields will change.



Start New Request

Packet Type Upload Producer CSV File

Upload Instructions

Note: Either SSN or NPN must be provided to process individual producers.

**Instructions**

To process bulk external id inactivation changes, you will need an Excel spreadsheet listing the producers to be updated. The columns should be as follows (values in **bold** indicate required fields):

- A. **Entity Type (IL or AGY)**
- B. TIN (with or without dashes)  
For AGY: **EIN (with or without dashes)**  
For IL: SSN (with or without dashes)
- C. NPN
- D. **Name (Individual Last Name or Agency Name)**
- E. FirstName (Individual First Name)
- F. Email Address
- G. **External System Id Termination Type**
  - ALL
  - ALL\_BY\_TYPE
  - SPECIFIC
- H. External System Id Type Code(s)  
Valid External ID Type Code List - Description  
AGENCYID - Agency ID  
AGTCD - Agent Code  
AGENTID - Agent ID  
DEFAULT - Default  
DISTCD - Distribution Code  
ENTCONCD - Entity Contact Code
- I. External System Id

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## Section: Inactivate or Delete External System IDs

## INDIVIDUAL PRODUCER REQUIRED FIELDS

Either an **SSN** or an **NPN** must be provided to process individual producers. Depending on your business setup, your organization may or may not maintain SSN numbers. If you do not use SSN numbers, the NPN number is required.

If the individual licensee has an NPN number, the required fields are:

Column	Field Name	Description
<b>A</b>	<b>Entity Type</b>	Use “ <b>IL</b> ” to indicate individual licensee
<b>C</b>	<b>National Producer ID (NPN)</b>	Type the full <b>NPN</b> number of the producer
<b>D</b>	<b>Name</b>	Type the <b>Last Name</b> of the producer
<b>G</b>	<b>External System ID Termination Type</b>	Type <b>ALL</b> to inactivate all the external system IDs. <ul style="list-style-type: none"> <li>If you use this option, you can leave columns “H” and “I” blank.</li> </ul> Type <b>ALL_BY_TYPE</b> to inactivate external system IDs by type. <ul style="list-style-type: none"> <li>If you use this option, you will need to enter the Ext System ID Type Code in column “H” (such as all AGENCYID).</li> </ul> Type <b>SPECIFIC</b> to inactivate specific IDs <ul style="list-style-type: none"> <li>If you use this option, you will need to list the specific IDs in column “I.”</li> </ul>

**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	I
Entity Type	TIN	NPN	Name	First Name	Email Address	External System ID Termination Type	External System ID Type Codes	External System ID
IL		1000000028	Easley			ALL_BY_TYPE	DEFAULT	

If the individual licensee has a **Social Security Number** (or **SSN**), the required fields are:

Column	Field Name	Description
<b>A</b>	<b>Entity Type</b>	Use “ <b>IL</b> ” to indicate individual licensee
<b>B</b>	<b>TIN (Taxpayer ID)</b>	Type the 9-digit <b>SSN</b> of the producer (with or without dashes)
<b>D</b>	<b>Name</b>	Type the <b>Last Name</b> of the producer
<b>G</b>	<b>External System ID Termination Type</b>	Type <b>ALL</b> to inactivate all the external system IDs. <ul style="list-style-type: none"> <li>If you use this option, you can leave columns “H” and “I” blank.</li> </ul> Type <b>ALL_BY_TYPE</b> to inactivate external system IDs by type.

## Section: Inactivate or Delete External System IDs

		<ul style="list-style-type: none"> <li>If you use this option, you will need to enter the Ext System ID Type Code in column "H" (such as all AGENCYID). Type <b>SPECIFIC</b> to inactivate specific IDs</li> <li>If you use this option, you will need to list the specific IDs in column "I."</li> </ul>
--	--	---

**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	I
Entity Type	TIN	NPN	Name	First Name	Email Address	External System ID Termination Type	External System ID Type Codes	External System ID
IL	000999123		Charron			ALL		

## AGENCY/FIRM REQUIRED FIELDS

The required fields for agencies or firms are:

Column	Field Name	Description
<b>A</b>	<b>Entity Type</b>	Use " <b>AGY</b> " to indicate an agency/firm
<b>B</b>	<b>TIN</b> (Taxpayer ID)	Type the 9-digit Employer Identification Number or <b>EIN</b> of the firm (with or without dashes)
<b>D</b>	<b>Name</b>	Type the full <b>Name</b> of the agency/firm. It must match the name in the producer record.
<b>G</b>	<b>External System ID Termination Type</b>	Type <b>ALL</b> to inactivate all the external system IDs. <ul style="list-style-type: none"> <li>If you use this option, you can leave columns "H" and "I" blank.</li> </ul> Type <b>ALL_BY_TYPE</b> to inactivate external system IDs by type. <ul style="list-style-type: none"> <li>If you use this option, you will need to enter the Ext System ID Type Code in column "H" (such as all AGENCYID).</li> </ul> Type <b>SPECIFIC</b> to inactivate specific IDs If you use this option, you will need to list the specific IDs in column "I."

**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	I
Entity Type	TIN	NPN	Name	First Name	Email Address	External System ID Termination Type	External System ID Type Codes	External System ID
AGY	00-6233077		Dean and Davis Insurance Agency			SPECIFIC		8253

## Section: Inactivate or Delete External System IDs

## OPTIONAL FIELDS

The table below lists all the optional fields you can include in the file.

**Note:** The required fields listed above are mandatory to complete the Bulk Connection update.

It is 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
<b>B</b>	<b>TIN</b> (Taxpayer ID)	For individual licenses with an <b>NPN</b> number, the Social Security Number, or <b>SSN</b> , is an optional field.
<b>C</b>	<b>NPN</b> (National Producer Number)	For individual licensees with a SSN number, the National Producer Number, or <b>NPN</b> , is optional. The <b>NPN</b> is also optional for agencies/firms.
<b>E</b>	<b>First Name</b>	For individual licensees, you can include the <b>First Name</b> of the producer.
<b>F</b>	<b>Email Address</b>	Type the <b>Email Address</b> associated with the producer.
<b>H</b>	<b>External System ID Type Code</b>	<p>This field is optional if you typed <b>ALL</b> in the External System ID Termination Type.</p> <p>If you typed <b>ALL_BY_TYPE</b> or <b>SPECIFIC</b> in the External System ID Termination Type field in column "G," this field is required.</p> <p>Type <b>AGENCYID</b> for Agency ID  Type <b>AGTCD</b> for Agent Code  Type <b>AGENTID</b> for Agent ID  Type <b>DEFAULT</b> for Default  Type <b>DISTCD</b> for Distribution Code  Type <b>ENTCONCD</b> for Entity Contact Code</p>
<b>I</b>	<b>External System ID</b>	This field is optional if you typed <b>ALL</b> or <b>ALL_BY_TYPE</b> in the External System ID Termination Type in column "G."



## Section: Inactivate or Delete External System IDs

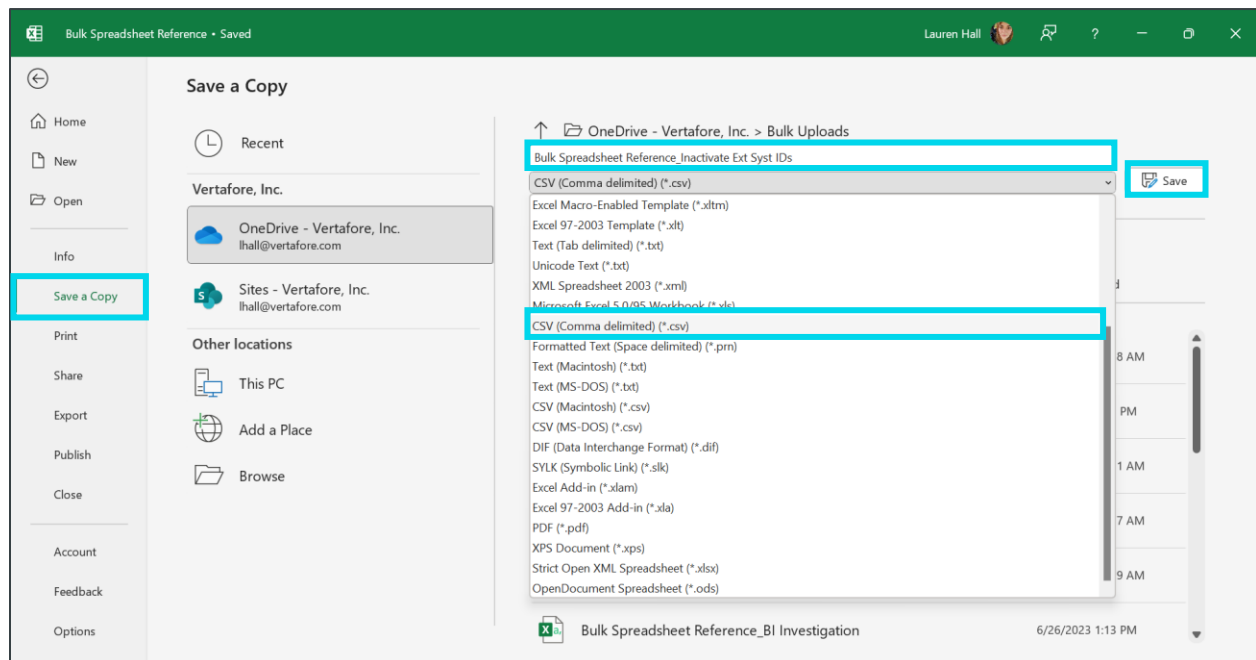
		If you typed <b>SPECIFIC</b> in the External System ID Termination Type field, you need to type the <b>External System ID</b> that you need to inactivate.
--	--	--

19. 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	I
AGY	00-6233077		Dean and Davis Insurance Agency			SPECIFIC		8253
IL		1000000028	Easley			ALL_BY_TYPE	DEFAULT	
IL	000999123		Charron			ALL		

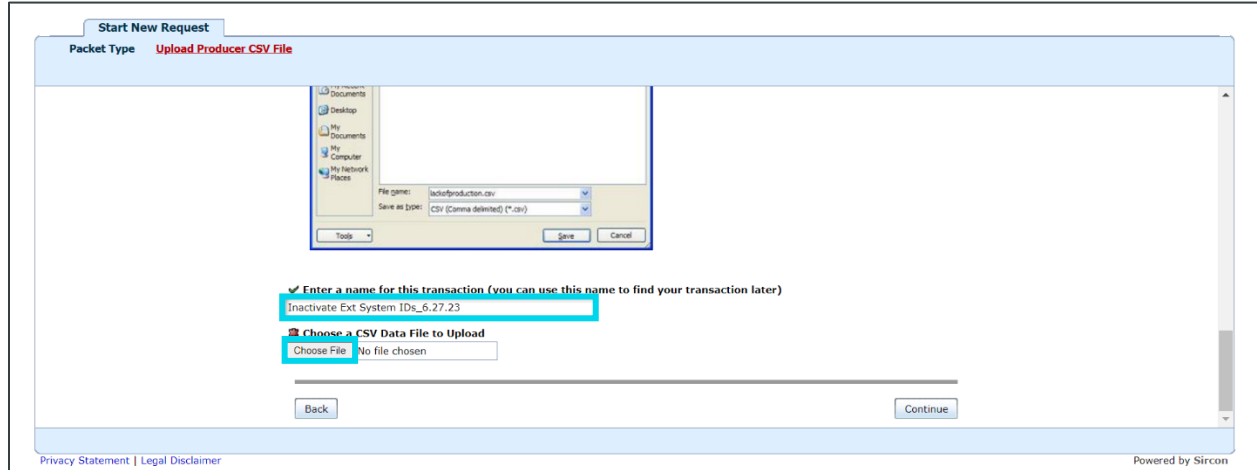
**Note:** If you inserted a header row containing the field names to guide your data entry, you must **delete the header** before moving on to the next step.

20. When you are finished, from the **File** menu, select **Save As**.
21. 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.
22. Click **Save**.

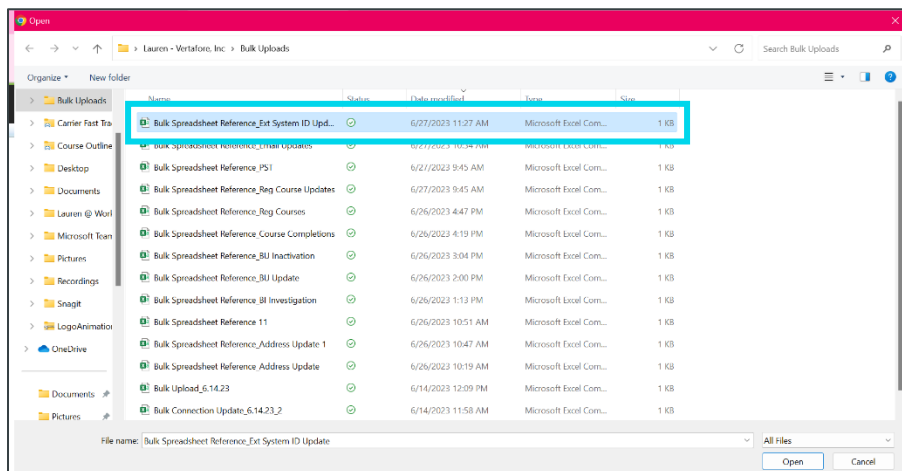


23. Your file is now saved in a comma-separated format and is ready for upload to the system.
24. Return to the application and scroll down to the bottom of the screen. **Enter the name of this transaction** in the box. This name will be visible to everyone in your organization.
25. Click the **Choose File** button.

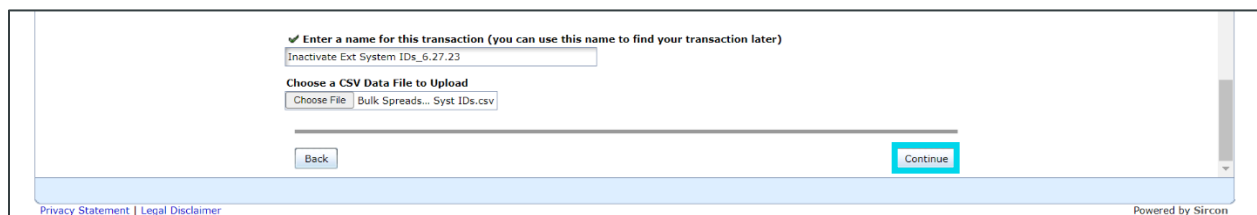
## Section: Inactivate or Delete External System IDs



26. Use the navigation options on the **Choose File** dialog box to locate the upload file (\*.csv) on your system.
27. When the correct file name appears in the **File Name** field, click the **Open** button.

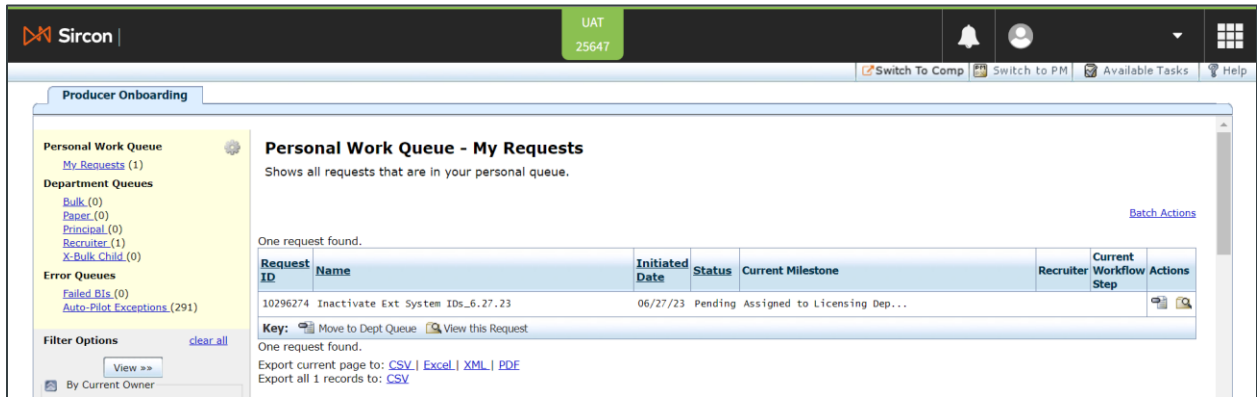


28. The file name will appear next to the **Choose File** button.
29. Click **Continue** to submit the file.







Section: Inactivate or Delete External System IDs

30. The bulk transaction will be assigned to your queue and will begin processing.



The screenshot shows the Sircon web application interface. At the top, there is a navigation bar with the Sircon logo, a user profile section showing 'UAT' and '25647', and utility icons for notifications, profile, and help. Below the navigation bar, the main content area is titled 'Producer Onboarding'. On the left, there is a sidebar with 'Personal Work Queue' (1 request), 'Department Queues' (Bulk: 0, Paper: 0, Principal: 0, Recruiter: 1, X-Bulk Child: 0), and 'Error Queues' (Failed BIs: 0, Auto-Pilot Exceptions: 291). The main area is titled 'Personal Work Queue - My Requests' and contains a table with one request. Below the table, there are options to 'Move to Dept Queue' and 'View this Request', and export options for CSV, Excel, XML, and PDF.

Request ID	Name	Initiated Date	Status	Current Milestone	Recruiter	Current Workflow Step	Actions
10296274	Inactivate Ext System IDs_6.27.23	06/27/23	Pending	Assigned to Licensing Dep...			 

Key:  Move to Dept Queue  View this Request

Export current page to: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)  
 Export all 1 records to: [CSV](#)

## Configure External System Type Codes

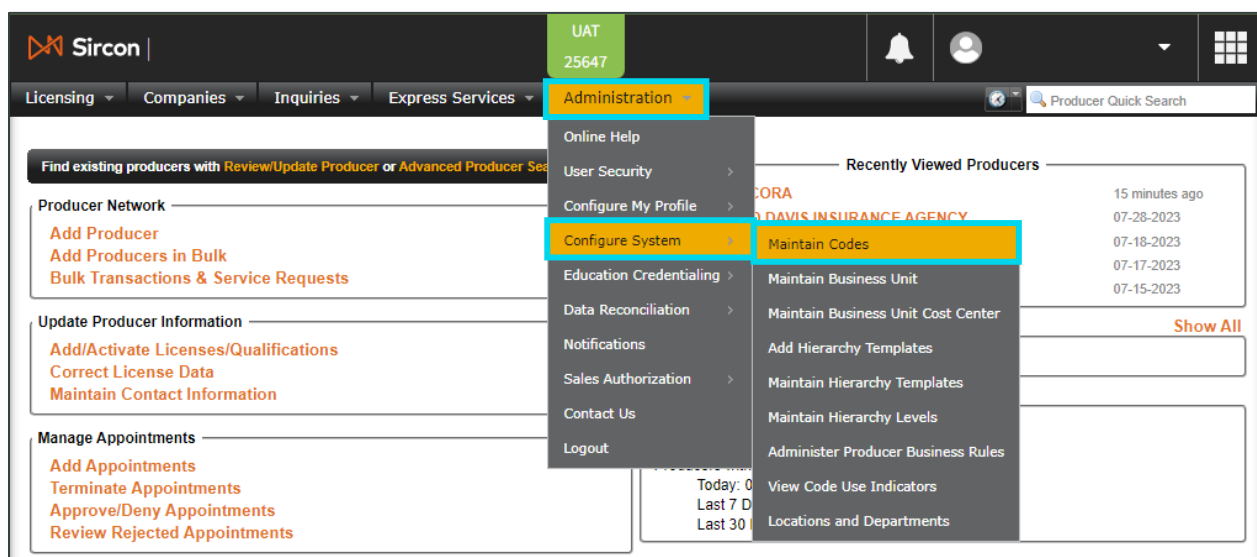
Users with administrative access can maintain the **External System Type Codes** using the *Maintain Codes* page in Producer Central.

The External System Type Codes are the categories that document the different types of IDs. For example, one External System Type code could be the Agency Code.

### View External System ID Codes

In this section, we will review how to view the current External System Type Codes.

1. From the **Administration** menu, click **Configure System** then click **Maintain Codes**.



2. Navigate to the **INTRFC\_TYPE\_CD** Interface Type Code Group.
3. Click the Expand button ( ) to see the list of all the current codes.

<input type="radio"/>	<input type="checkbox"/>	INDV_ORG_ASSC_ASSOC_CD	Individual Organization Association Association Code
<input type="radio"/>	<input type="checkbox"/>	INDV_ORG_ASSC_POS_CD	Individual Organization Association Position Code
<input type="radio"/>	<input checked="" type="checkbox"/>	INTRFC_TYPE_CD	Interface Type Code
<input type="radio"/>	<input type="checkbox"/>	MAIL_LBL_CAT_CD	Mailing Label Category Code
<input type="radio"/>	<input type="checkbox"/>	MKT_STRGY_TYPE_CD	Market Strategy Type Code
<input type="radio"/>	<input type="checkbox"/>	NASD_SERIES_TYPE_CD	NASD Series Type Code
<input type="radio"/>	<input type="checkbox"/>	ORG_ADDR_CNTCT_TYPE_CD	Organization Address Contact Type Code
<input type="radio"/>	<input type="checkbox"/>	ORG_ALS_TYPE_CD	Organization Alias Type Code
<input type="radio"/>	<input type="checkbox"/>	ORG_ASSC_ASSOC_CD	Organization Association Association Code
<input type="radio"/>	<input type="checkbox"/>	OTHR_ORG_TYPE_CD	Other/Misc. Organization Type Code
<input type="radio"/>	<input type="checkbox"/>	PAYMENT_FREQUENCY_CD	Payment Frequency Code
<input type="radio"/>	<input type="checkbox"/>	PRDCR_APPL_UNAPRV_RSN_CD	Producer Application Unapproved Reason Code
<input type="radio"/>	<input type="checkbox"/>	PRDCR_LMT_RSN_TYPE_CD	Producer Limitation Reason Type Code
<input type="radio"/>	<input type="checkbox"/>	PRDCR_RJCT_RQST_RSN_CD	Producer Rejected Request Reason Code

## Section: Configure External System Type Codes

- Here you can see all the **Active** and **Inactive** External System ID **Code Types**.

<input type="radio"/>	<input type="checkbox"/>	INDV_ORG_ASSC_POS_CD	Individual Organization Association Position Code					
<input type="radio"/>	<input type="checkbox"/>	INTRFC_TYPE_CD	Interface Type Code					
<b>Codes</b>								
	Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
	AGYCD	Agency Code	Active	05-01-2020		<input type="checkbox"/>	Agency Code	
	AGENCYID	Agency Id	Active	04-26-2011		<input type="checkbox"/>	Agency Id	
	AGTCD	Agent Code	Active	08-06-2019		<input type="checkbox"/>	Agent Code	
	AGENTID	Agent Id	Active	04-26-2011		<input type="checkbox"/>	Agent Id	
	DISTCD	Distribution Code	Active	08-06-2019		<input type="checkbox"/>	Distribution Code	
	ENTCONCD	Entity Contact Code	Active	08-06-2019		<input type="checkbox"/>	Entity Contact Code	
<input type="radio"/>	<input type="checkbox"/>	MAIL_LBL_CAT_CD	Mailing Label Category Code					
<input type="radio"/>	<input type="checkbox"/>	MKT_STRGY_TYPE_CD	Market Strategy Type Code					

## Edit External System ID Codes

- To edit the **Code Group**, click the button next to the group and then click **Next**.

<input checked="" type="radio"/>	<input type="checkbox"/>	INTRFC_TYPE_CD	Interface Type Code					
<b>Codes</b>								
	Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
	AGYCD	Agency Code	Active	05-01-2020		<input type="checkbox"/>	Agency Code	
	AGENCYID	Agency Id	Active	04-26-2011		<input type="checkbox"/>	Agency Id	
	AGTCD	Agent Code	Active	08-06-2019		<input type="checkbox"/>	Agent Code	
	AGENTID	Agent Id	Active	04-26-2011		<input type="checkbox"/>	Agent Id	
	DISTCD	Distribution Code	Active	08-06-2019		<input type="checkbox"/>	Distribution Code	
	ENTCONCD	Entity Contact Code	Active	08-06-2019		<input type="checkbox"/>	Entity Contact Code	
<input type="radio"/>	<input type="checkbox"/>	MAIL_LBL_CAT_CD	Mailing Label Category Code					
<input type="radio"/>	<input type="checkbox"/>	MKT_STRGY_TYPE_CD	Market Strategy Type Code					
<input type="radio"/>	<input type="checkbox"/>	NASD_SERIES_TYPE_CD	NASD Series Type Code					
<input type="radio"/>	<input type="checkbox"/>	RGLTNG_BDY_CD	Regulating Body Code					
<input type="radio"/>	<input type="checkbox"/>	RGLTRY_BDY_CD	Regulatory Body Code					
<input type="radio"/>	<input type="checkbox"/>	RQD_ITEM_TYPE_CD	Required Item Type Code					
<input type="radio"/>	<input type="checkbox"/>	RSTR_TYPE_CD	Restriction Type Code					
<input type="radio"/>	<input type="checkbox"/>	SM_ROLE_CD	Staff Member Role Code					
<input type="radio"/>	<input type="checkbox"/>	SUPPRESS_LETTER_TYPE_CD	Suppressible Letter Type Code					
<input type="radio"/>	<input type="checkbox"/>	SW_PROD_CD	Software Product Code					
<input type="radio"/>	<input type="checkbox"/>	TRMN_VEST_TYPE_CD	Termination Vesting Type Code					
								<input type="button" value="Next"/> <input type="button" value="Return"/>

- You will now see the *Maintain Codes* page.
- From here you can:
  - Add a New External System ID
  - Edit Existing External System IDs

## Section: Configure External System Type Codes

### Maintain Codes

Current Code Group			
Code Group	Description		
INTRFC_TYPE_CD	Interface Type Code		

**Codes** Add a New Code

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
AGYCD	Agency Code	Active	05-01-2020		<input type="checkbox"/>	Agency Code	Edit
AGENCYID	Agency Id	Active	04-26-2011		<input type="checkbox"/>	Agency Id	Edit
AGTCD	Agent Code	Active	08-06-2019		<input type="checkbox"/>	Agent Code	Edit
AGENTID	Agent Id	Active	04-26-2011		<input type="checkbox"/>	Agent Id	Edit
DISTCD	Distribution Code	Active	08-06-2019		<input type="checkbox"/>	Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019		<input type="checkbox"/>	Entity Contact Code	Edit

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	
<input type="text"/>	<input type="text"/>	Active <input type="text"/>	08-25-2023 <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	Clear

**Comment**

## ADD A NEW EXTERNAL SYSTEM ID CODE

Follow these steps to add a new External System ID Type Code.

1. Click **Add a New Code**.

### Maintain Codes

Current Code Group			
Code Group	Description		
INTRFC_TYPE_CD	Interface Type Code		

**Codes** Add a New Code

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
AGYCD	Agency Code	Active	05-01-2020		<input type="checkbox"/>	Agency Code	Edit
AGENCYID	Agency Id	Active	04-26-2011		<input type="checkbox"/>	Agency Id	Edit
AGTCD	Agent Code	Active	08-06-2019		<input type="checkbox"/>	Agent Code	Edit
AGENTID	Agent Id	Active	04-26-2011		<input type="checkbox"/>	Agent Id	Edit
DISTCD	Distribution Code	Active	08-06-2019		<input type="checkbox"/>	Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019		<input type="checkbox"/>	Entity Contact Code	Edit

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	
<input type="text"/>	<input type="text"/>	Active <input type="text"/>	08-25-2023 <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	Clear

**Comment**

2. Enter the following fields into the *Add/Update Codes* section:

- **Code:** Type the short name of the External System ID Code Type.
- **Short Description:** Type a short description of the Code Type.

## Section: Configure External System Type Codes

- **Status:** Select **Active** for the status of a new code.
  - **Begin Date:** Date the External System ID code type is available in the system. The date must be in the MM-DD-YYYY format.
  - **Long Description:** Enter a long description of the code type.
3. Click **Save**.

### Maintain Codes

**Current Code Group**

Code Group	Description
INTRFC_TYPE_CD	Interface Type Code

**Codes** Add a New Code

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
AGYCD	Agency Code	Active	05-01-2020		<input type="checkbox"/>	Agency Code	Edit
AGENCYID	Agency Id	Active	04-26-2011		<input type="checkbox"/>	Agency Id	Edit
AGTCD	Agent Code	Active	08-06-2019		<input type="checkbox"/>	Agent Code	Edit
AGENTID	Agent Id	Active	04-26-2011		<input type="checkbox"/>	Agent Id	Edit
DISTCD	Distribution Code	Active	08-06-2019		<input type="checkbox"/>	Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019		<input type="checkbox"/>	Entity Contact Code	Edit

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	
AGTRGN	Agent Region	Active	08-25-2023		<input type="checkbox"/>	Agent Region	Clear

**Comment**

4. The code type is now available in Producer Central.

### Maintain Codes

**Current Code Group**

Code Group	Description
INTRFC_TYPE_CD	Interface Type Code

**Codes** Add a New Code

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
AGYCD	Agency Code	Active	05-01-2020		<input type="checkbox"/>	Agency Code	Edit
AGENCYID	Agency Id	Active	04-26-2011		<input type="checkbox"/>	Agency Id	Edit
AGTCD	Agent Code	Active	08-06-2019		<input type="checkbox"/>	Agent Code	Edit
AGENTID	Agent Id	Active	04-26-2011		<input type="checkbox"/>	Agent Id	Edit
AGTRGN	Agent Region	Active	08-25-2023		<input type="checkbox"/>	Agent Region	Edit
DISTCD	Distribution Code	Active	08-06-2019		<input type="checkbox"/>	Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019		<input type="checkbox"/>	Entity Contact Code	Edit

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	
		Active	08-25-2023		<input type="checkbox"/>		Clear

**Comment**

Section: Configure External System Type Codes

EDIT AN EXISTING EXTERNAL SYSTEM ID CODE

Follow these steps to update an existing External System ID Code Type.

1. From the *Maintain Codes* page, click **Edit** next to the code you need to modify.

### Maintain Codes

Current Code Group		Code Group	Description
		INTRFC_TYPE_CD	Interface Type Code

**Codes** Add a New Code

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
AGYCD	Agency Code	Active	05-01-2020		<input type="checkbox"/>	Agency Code	Edit
AGENCYID	Agency Id	Active	04-26-2011		<input type="checkbox"/>	Agency Id	Edit
AGTCD	Agent Code	Active	08-06-2019		<input type="checkbox"/>	Agent Code	Edit
AGENTID	Agent Id	Active	04-26-2011		<input type="checkbox"/>	Agent Id	Edit
AGTRGN	Agent Region	Active	08-25-2023		<input type="checkbox"/>	Agent Region	Edit
DISTCD	Distribution Code	Active	08-06-2019		<input type="checkbox"/>	Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019		<input type="checkbox"/>	Entity Contact Code	Edit

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description
<input type="text"/>	<input type="text"/>	Active	08-25-2023	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

**Comment**

2. You cannot edit the **Code** itself, however you can edit the other fields.
3. Click **Save** to submit your changes.

### Maintain Codes

Current Code Group		Code Group	Description
		INTRFC_TYPE_CD	Interface Type Code

**Codes** Add a New Code

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
AGYCD	Agency Code	Active	05-01-2020		<input type="checkbox"/>	Agency Code	Edit
AGENCYID	Agency Id	Active	04-26-2011		<input type="checkbox"/>	Agency Id	Edit
AGTCD	Agent Code	Active	08-06-2019		<input type="checkbox"/>	Agent Code	Edit
AGENTID	Agent Id	Active	04-26-2011		<input type="checkbox"/>	Agent Id	Edit
AGTRGN	Agent Region	Active	08-25-2023		<input type="checkbox"/>	Agent Region	Edit
DISTCD	Distribution Code	Active	08-06-2019		<input type="checkbox"/>	Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019		<input type="checkbox"/>	Entity Contact Code	Edit

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description
AGENCYID	Agency ID	Active	04-26-2011	<input type="text"/>	<input type="checkbox"/>	Agency ID

**Comment**



## Section: Configure External System Type Codes

- The changes will now be reflected in Producer Central in any place where the Code Type is used including the producer records and inquiries.

### Maintain Codes

**Current Code Group**

Code Group	Description
INTRFC_TYPE_CD	Interface Type Code

**Codes** Add a New Code

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
AGYCD	Agency Code	Active	05-01-2020		<input type="checkbox"/>	Agency Code	Edit
AGENCYID	Agency ID	Active	04-26-2011		<input type="checkbox"/>	Agency ID	Edit
AGTCD	Agent Code	Active	08-06-2019		<input type="checkbox"/>	Agent Code	Edit
AGENTID	Agent Id	Active	04-26-2011		<input type="checkbox"/>	Agent Id	Edit
AGTRGN	Agent Region	Active	08-25-2023		<input type="checkbox"/>	Agent Region	Edit
DISTCD	Distribution Code	Active	08-06-2019		<input type="checkbox"/>	Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019		<input type="checkbox"/>	Entity Contact Code	Edit

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	
<input type="text"/>	<input type="text"/>	Active <input type="checkbox"/>	08-25-2023 <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	Clear
<b>Comment</b>		<input style="width: 100%;" type="text"/>					

## INACTIVATE AN EXTERNAL SYSTEM ID CODE

Follow these steps to inactivate an external system ID code type. To preserve the data in Producer Central, there is no option to delete the External System ID Codes. Instead, you can inactivate the code so that it can no longer be used in the system.

- Click **Edit** next to the code you need to inactivate.

### Maintain Codes

**Current Code Group**

Code Group	Description
INTRFC_TYPE_CD	Interface Type Code

**Codes** Add a New Code

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
AGYCD	Agency Code	Active	05-01-2020		<input type="checkbox"/>	Agency Code	Edit
AGENCYID	Agency ID	Active	04-26-2011		<input type="checkbox"/>	Agency ID	Edit
AGTCD	Agent Code	Active	08-06-2019		<input type="checkbox"/>	Agent Code	Edit
AGENTID	Agent ID	Active	04-26-2011		<input type="checkbox"/>	Agent ID	Edit
AGTRGN	Agent Region	Active	08-25-2023		<input type="checkbox"/>	Agent Region	Edit
DISTCD	Distribution Code	Active	08-06-2019		<input type="checkbox"/>	Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019		<input type="checkbox"/>	Entity Contact Code	Edit

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	
<input type="text"/>	<input type="text"/>	Active <input type="checkbox"/>	08-25-2023 <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	Clear
<b>Comment</b>		<input style="width: 100%;" type="text"/>					

Section: Configure External System Type Codes

2. Change the **Status** from **Active** to **Historical**.
3. Enter the date you need to inactivate the code type in the **End Date** field.
4. Click **Save**.

### Maintain Codes

**Current Code Group**

Code Group	Description
INTRFC_TYPE_CD	Interface Type Code

**Codes** Add a New Code

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
AGYCD	Agency Code	Active	05-01-2020		<input type="checkbox"/>	Agency Code	Edit
AGENCYID	Agency ID	Active	04-26-2011		<input type="checkbox"/>	Agency ID	Edit
AGTCD	Agent Code	Active	08-06-2019		<input type="checkbox"/>	Agent Code	Edit
AGENTID	Agent ID	Active	04-26-2011		<input type="checkbox"/>	Agent ID	Edit
AGTRGN	Agent Region	Active	08-25-2023		<input type="checkbox"/>	Agent Region	Edit
DISTCD	Distribution Code	Active	08-06-2019		<input type="checkbox"/>	Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019		<input type="checkbox"/>	Entity Contact Code	Edit

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	
AGTRGN	Agent Region	Historical	08-25-2023	08-25-2023	<input type="checkbox"/>	Agent Region	Clear

**Comment**

Previous Save Return

5. The code type is now inactive and will no longer be available in the External System ID dropdown in Producer Central.

### Maintain Codes

**Current Code Group**

Code Group	Description
INTRFC_TYPE_CD	Interface Type Code

**Codes** Add a New Code

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
AGYCD	Agency Code	Active	05-01-2020		<input type="checkbox"/>	Agency Code	Edit
AGENCYID	Agency ID	Active	04-26-2011		<input type="checkbox"/>	Agency ID	Edit
AGTCD	Agent Code	Active	08-06-2019		<input type="checkbox"/>	Agent Code	Edit
AGENTID	Agent ID	Active	04-26-2011		<input type="checkbox"/>	Agent ID	Edit
AGTRGN	Agent Region	Historical	08-25-2023	08-25-2023	<input type="checkbox"/>	Agent Region	Edit
DISTCD	Distribution Code	Active	08-06-2019		<input type="checkbox"/>	Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019		<input type="checkbox"/>	Entity Contact Code	Edit

**Add/Update Codes**

Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	
		Active	08-25-2023		<input type="checkbox"/>		Clear

**Comment**

Previous Save Return

Section: Configure External System Type Codes

**Note:** If you add custom ESID codes to Producer Central, you will need to report the newly added Codes using a case in My Vertafore, requesting Vertafore to add the External System ID Type Codes to the *Upload Instructions* of the Bulk External System ID functionality.

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

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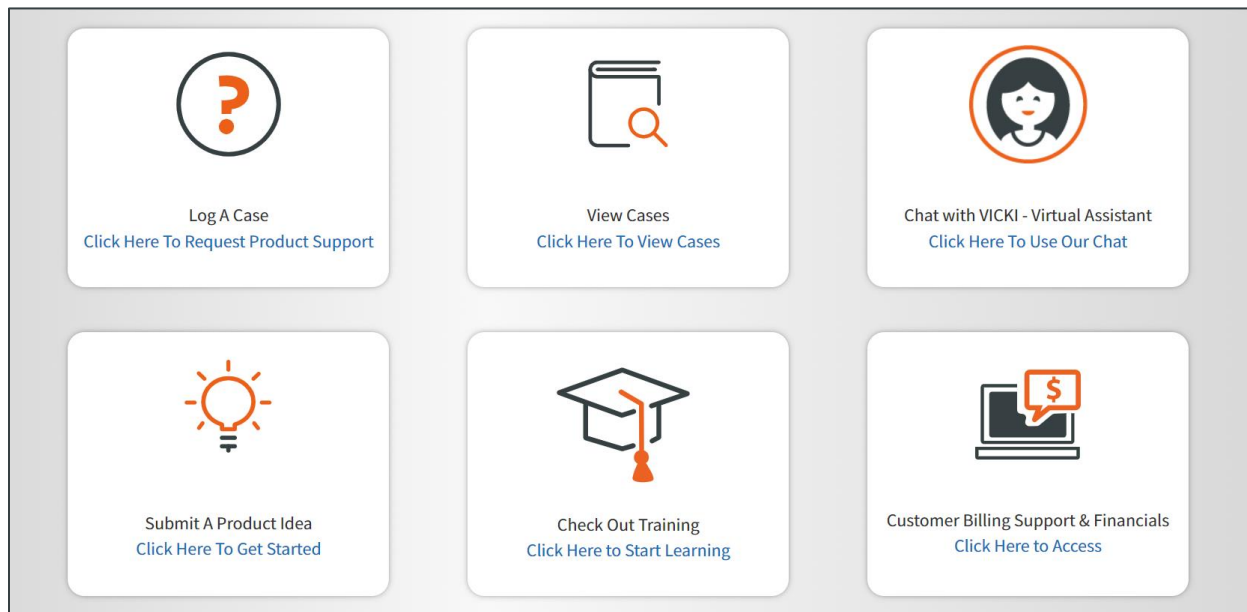
Help is just a click away. Vertafore has two resources available to support you 24/7:

- 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.

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***APPENDIX 2: Document History***

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Version	Revision Date	Revision Record
1.0	8/25/2023	Original Document



999 18<sup>th</sup> St | Denver, CO, 80202 | 877.876.4430 | [Vertafore.com](https://www.vertafore.com)

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