

POWERING YOUR POSSIBLE.



SIRCON FOR CARRIERS

External System IDs



Section: Overview

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Section: Overview

Overview

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



Section: View External System IDs

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.

Sircon UAT 2564	A O	- III
Licensing - Companies - Inquiries - Express Services - Admi	nistration 👻	🔍 Easiey
Find aviation producers with Daviasul Indate Producer or Advanced Doducer Search	Recently Viewed Produce	EASLEY, CORA (VA) SSN: none
Producer Network — Add Producer Add Producers in Bulk Bulk Transactions & Service Requests	 EASLEY, CORA DEAN AND DAVIS INSURANCE AGENCY CLARK, MELISSA J SHELBY, GROVER J Allen 	40 minutes ago 07-28-2023 07-18-2023 07-17-2023 07-17-2023 07-15-2023
Update Producer Information Add/Activate Licenses/Qualifications Correct License Data Maintain Contact Information	Recent Subscriber Notices No notices. PDB Updates Summary	Show All
Manage Appointments Add Appointments Terminate Appointments Approve/Deny Appointments Review Rejected Appointments	Producers with pending updates: 4 Producers with completed updates: Today: 0 Last 7 Days: 9 Last 30 Days:	

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.

		Review/Up	date Individual	
EASLEY, CORA Unrated				Search Producer
External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
		100000028	VA / 736178	
■ Expand All				
Individual Details	Agreements		Locations and Departments	Securities Information
Producer Business Rules	Firm Associatio	ns	Costs	Authorization Overrides
Resident States	Employment His	story	Education Credentials	Compensation Profile
External Sys IDs	Aliases		Course Completions	
Contact Information	Data Reconcilia	tion	Third Party Certifications	
Address History	State Producer	Numbers	License Applications	
Email Messages	Required Items		Comments	
Licenses/Qualifications	Background Inv	estigations	Transaction History	
Appointments	Business Units		Professional Liability	
[
	New DY Desweet	Marifa Calas Audi	Deview Circon Cub	
	New PX Request	verity Sales Aut	Review Sircon Sub	scripuon



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.

Producer Busines	s Rules		Тор		
Resident States			Тор		
□ External Sys IDs			Тор		
External System	Type External Syst	em Identifier Business Unit	Primary Inactive		
Distribution Code	1934	PC (Personal / Commercial)			
Add/Update/Delete External System Identifiers					
E Contact Information	on		Тор		



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.

Producer Business Rules						Тор
						Тор
External Sys IDs						Тор
External System Type	Exter	nal System Identifier	Busin	ess Unit	Primary	Inactive
Distribution Code	1934	PC	C (Personal / Commercial)	1		
		Add/Update/Delete Externa	I System Identifiers			
Contact Information						Тор

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

Maintain External System Identifiers							
a EASLE	Y, CORA Unrated					Searcl	h Producer
External Syste	em ID Ac	ctive BU	IPN	Resident State/License	Additional States/L	icenses	
	Đ	DEFAULT	100000028	VA / 736178	AZ / 1000000	005	
Current E	xternal System Identifi External System Type	External Syste	m ID	Business Unit	Add New Exter Primary	nal Syster Inactive	n Identifier
		1934	PC (Per	sonal / Commercial)			Return
Add/Upda	ite External System ide	External System		Business Unit		Drimany	Liear
	ystem type	v	Generate ID		~		
					Save	n Save a	nd Return

- 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 <u>Configure External System ID Codes</u> section of this quick guide.



- **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							
a EASLEY	, CORA Unrated					Search	h Producer
External System	n ID A	Active BU	NPN	Resident State/License	Additional States/L	icenses	
	I	DEFAULT	100000028	VA / 736178	AZ / 1000000	005	
Current Ex Delete Delete	Aternal System Identi External System Type Istribution Code	n Identifiers Add New External System Stem Type External System ID Business Unit Primary Inactive 1934 PC (Personal / Commercial)			n Identifier Edit Return		
Add/Updat	te External System Id	dentifiers					Clear
External Sy	stem Type	External Sy	stem ID	Business Unit		Primary	Inactive
Agency Cod	e	✓ SF101	Generate I	DEFAULT (DEFAULT)	~		
					Save	m Save a	nd Return

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

Maintain External System Identifiers								
💂 EASI	EY, CORA Unrated						Searc	h Producer
External Sy	stem ID	Active BU	NPN	R	esident State/License	Additional States/	Licenses	
			10000	00028	/A / 736178	⊞ AZ / 100000)005	
Current	Current External System Identifiers Add New External System Identifier					n Identifier		
Delete	Agonov Code	Stem Type	sternal system ib		EEALILT)	Primary	inactive	Edit
	Distribution Code	3F101		BC (Persona				Edit
	Distribution Code	1934		FC (Persona	r/ commercial)			Euit
Delete								Return
Add/Up	date External Sy	stem Identifiers						Clear
External	System Type	Exter	nal System ID		Business Unit		Primary	Inactive
		~		Generate ID		~		
						Save	rn Save a	ind Return



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**.

Sircon Lansing Mutual		Meagan Brandt Meagan Brandt	
Licensing Companies Inquiries Express Services Administra	GO TO		
Find existing producers with Review/Update Producer or Advanced Producer Search		Dashboard	NEW
Producer Network Add Producer	ADELBERG, MEAGAN	Producer Administration	CLASSIC
Add Producers in Bulk Bulk Transactions & Service Requests	SPINGOLA, JILL	Bulk Transactions & Service Requests	CLASSIC

- 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.

M Sircon	2	UAT 15647		•	- III
			Switch To Comp 🔀 S	witch to PM 🗕 🞯 Available	: Tasks - 💡 Help
Producer Onboarding				🇌 Start New Request	
				🕙 Reports	
Personal Work Queue	Personal Work Queue - My Requests Shows all requests that are in your personal queue.	;		Account Options	
Department Queues					
Bulk (0) Paper (0) Principal (0) Recruiter (1) X-Bulk Child (0)	Request Name ID Nothing found to display.	Initiated Date Status	Current Milestone	Recruiter	Actions

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

M Sircon	UAT 25647			• · ·	
▲ Some Workspace				🚰 Switch To Comp 🔡 Switch to PM	💡 Help
Start New Request Packet Type					
					*
	Packe	ат Туре			
	*	Packet Type			
		Contin	ue		



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

Start New Request	
Packet Type	
	Packet Type
	Packet Tyne
	Bulk - External System Id
	Caption
	Conunue

- 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.

Upload Instructions	
Note: Either SSN or NPN must be provided to process individual producers.	
M Instructions	
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 ACY: ETR (with or without dashes) For IL: SSN (with or without dashes) C. NPM D. News (additional Lott burnes or denome heave)	
6: Hanie (Individual First Name) E: First Name (Individual First Name) F: Email Address G. External System Id Type Code(s)	
vanic Externiar ID YIPE Code Last - Description AGENCY ID - Agency ID AGTCD - Agenc Tode AGENTID - Agenci ID DEFAULT - Default	
DISTCD - Distribution Code ENTCONCD - Entity Contact Code	

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		
Α	Entity Type	Use "IL" to indicate individual licensee		
С	National Producer ID (NPN)	Type the full NPN number of the producer		
D	Name	Type the Last Name of the producer		
G	External System ID Type Codes	Enter the External System ID Type Codes. The standard codes are listed below; however, you may have custom codes maintained for your business: • Type AGENCYID for Agency ID • Type AGTCD for Agent Code • Type AGENTID for Agent ID • Type DEFAULT for Default • Type DISTCD for Distribution Code • Type ENTCONCD for Entity Contact Code		
Н	External System ID	Type the producer's External System ID		

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.

Α	В	С	D	E	F	G	Н
Entity Type	TIN	NPN	Name	First Name	Email Address	External System ID Type Codes	External System ID
IL		100000028	Easley			AGENTID	5234897

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

Column	Field Name	Description
Α	Entity Type	Use "IL" to indicate individual licensee
В	TIN (Taxpayer ID)	Type the 9-digit SSN of the producer (with or without dashes)
D	Name	Type the Last Name of the producer
G	External System ID Type Codes	Enter the External System ID Type Codes. The standard codes are listed below; however, you may have custom codes maintained for your business:



		Type AGENCYID for Agency ID
		Type AGTCD for Agent Code
		 Type AGENTID for Agent ID
		 Type DEFAULT for Default
		Type DISTCD for Distribution Code
		Type ENTCONCD for Entity Contact Code
Н	External System ID	Type the producer's External System ID

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

А	В	С	D	E	F	G	Н
Entity Type	TIN	NPN	Name	First Name	Email Address	External System ID Type Codes	External System ID
IL	000999123		Charron			DISTCD	NW-WA

AGENCY/FIRM REQUIRED FIELDS

The required fields for agencies or firms are:

Column	Field Name	Description
Α	Entity Type	Use "AGY" to indicate an agency/firm
В	TIN (Taxpayer ID)	Type the 9-digit Employer Identification Number or EIN of the firm (with or without dashes)
D	Name	Type the full Name of the agency/firm. It must match the name in the producer record.
G	External System ID Type Codes	Enter the External System ID Type Codes. The standard codes are listed below; however, you may have custom codes maintained for your business: • Type AGENCYID for Agency ID • Type AGTCD for Agent Code • Type AGENTID for Agent ID • Type DEFAULT for Default • Type DISTCD for Distribution Code • Type ENTCONCD for Entity Contact Code
Н	External System ID	Type the producer's External System ID

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.

А	В	С	D	E	F	G	Н
Entity Type	TIN	NPN	Name	First Name	Email Address	External System ID Type Codes	External System ID
AGY	00-6233077		Dean and Davis Insurance Agency			AGENCYID	8253



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

А	В	С	D	E	F	G	Н
AGY	00-6233077		Dean and Davis Insurance Agency			AGENCYID	8253
IL	000999123		Charron			DISTCD	NW-WA
IL		100000028	Easley			AGENTID	5234897

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

- 8. When you are finished, from the **File** menu, select **Save As**.
- 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

Bulk Spreadshe	et Reference • Saved	Lauren Hall	👂 🔗			o	
\odot	Save a Copy						
ሰ Home	L Recent	↑ 🗁 OneDrive - Vertafore, Inc. > Bulk Uploads					
🗋 New	Vertréese les	Bulk Spreadsheet Reference_Ext System ID Update CSV (Comma delimited) (*.csv)			J 🕞	Save	
🗁 Open	vertarore, inc.	Excel Macro-Enabled Template (*.xltm)			1		·
Info	OneDrive - Vertafore, Inc. Ihall@vertafore.com	Excel 97-2003 Template (*.tt) Text (Tab delimited) (*.tt) Unicode Text (*.tt)					
Save a Copy	Sites - Vertafore, Inc. Ihall@vertafore.com	XML Spreadsheet 2003 (*.xml) Microsoft Excel 5.005K Workhook (*.xk)			ł		
Print	Other locations	CSV (Comma delimited) (*.csv)		_			
Share	This PC	Text (Macintosh) (".txt) Text (MS-DOS) (*.txt)			8 AM		
Export	Add a Place	CSV (Macintosh) (*.sv) CSV (MS-DOS) (*.sv) DIE (Data Interchance Format) (*.dif)			PM	_	
Publish	Browse	SYLK (Symbolic Link) (* slk) Even Addiair (* vlam)			1 AM		
Close		Excel Field in Casiny Excel 97-2003 Add-in (*xla) PDF (*.pdf)			7 AM		
Account		XPS Document (*.xps) Strict Open XML Spreadsheet (*.xlsx)			9 AM		
Feedback		OpenDocument Spreadsheet (*.ods)					
Options		Bulk Spreadsheet Reference_BI Investigation	6/26	/2023 1	13 PM	Ŧ	

- 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.

Packet Type Upload Producer (/ File	
	Centers The general industry of the set of the	ransaction later)
	Choose a CSV Data File to Upload Choose File No file chosen	
	Back	Continue

- 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.



Open							
← → ∨ ↑	> Lauren - Vertafore, Inc. > Bulk Uploads					✓ C Search Bulk Uploads	,
Organize • New folder						≣ •	
> 📒 Bulk Uploads	Namo	Status	Date modified	Tune	Size		
> 🛅 Carrier Fast Tra-	Bulk Spreadsheet Reference_Ext System ID Upd	c	6/27/2023 10:58 AM	Microsoft Excel Com	1 KB		
> 📴 Course Outline	 Buik Spreadsheet Reference_Email Opdates 		0/27/2023 10:34 AM	MICrosoft Excel Com	1 KD		
> 🔚 Desktop	Bulk Spreadsheet Reference_PST	\odot	6/27/2023 9:45 AM	Microsoft Excel Com	1 KB		
> Documents	Bulk Spreadsheet Reference_Reg Course Updates	\odot	6/27/2023 9:45 AM	Microsoft Excel Com	1 KB		
> 📜 Lauren @ Worł	Bulk Spreadsheet Reference_Reg Courses	\odot	6/26/2023 4:47 PM	Microsoft Excel Com	1 KB		
> 📜 Microsoft Team	Bulk Spreadsheet Reference_Course Completions	\odot	6/26/2023 4:19 PM	Microsoft Excel Com	1 KB		
> 🚞 Pictures	Bulk Spreadsheet Reference_BU Inactivation	\odot	6/26/2023 3:04 PM	Microsoft Excel Com	1 KB		
> 🔚 Recordings	Bulk Spreadsheet Reference_BU Update	\odot	6/26/2023 2:00 PM	Microsoft Excel Com	1 KB		
> 🔚 Snagit	Bulk Spreadsheet Reference_BI Investigation	\odot	6/26/2023 1:13 PM	Microsoft Excel Com	1 KB		
> 📴 LogoAnimation	Bulk Spreadsheet Reference 11	\odot	6/26/2023 10:51 AM	Microsoft Excel Com	1 KB		
OneDrive	Bulk Spreadsheet Reference_Address Update 1	\odot	6/26/2023 10:47 AM	Microsoft Excel Com	1 KB		
	Bulk Spreadsheet Reference_Address Update	\odot	6/26/2023 10:19 AM	Microsoft Excel Com	1 KB		
Documents 🖈	Bulk Upload_6.14.23	\odot	6/14/2023 12:09 PM	Microsoft Excel Com	1 KB		
📜 Pictures 🔹 🖈	Bulk Connection Update_6.14.23_2	ø	6/14/2023 11:58 AM	Microsoft Excel Com	1 KB		
File nam	Bulk Spreadsheet Reference_Ext System ID Update					~ All Files	
						Open	Cancel

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

Start New Request Packet Type Upload Producer CSV	File	
	Central System ID_6.27.23	
	Choose A CSV Data File to Upload Choose File Bulk SpreadsD Update.csv Back Continue Continue	Ŧ

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

M Sircon		UAT 25647		A O	- 🔳
Producer Onboarding			C	Switch To Comp 🛅 Switch to PM	📓 Available Tasks 🛛 🦉 Help
Personal Work Queue My. Recuests (1) Department Queues Buik (0) Paper (0) Pence (0) Beculter (1)	Personal Work Queue - My Reque Shows all requests that are in your personal que One request found.	e sts ue.			A Batch Actions
X-Bulk Child (0) Error Queues	Request ID Name	Initiated Date	Status Current Milestone	Recruite	Current r Workflow Actions Step
Failed BIs (0) Auto-Pilot Exceptions (291)	10296212 External System ID_6.27.23	06/27/23	Pending Assigned to Licensing De	p	9 🕰
Filter Options clear all View >> S By Current Owner	Key: The Dept Queue Structure One request found. Export current page to: CSV. Excel. XML. PDF Export all 1 records to: CSV. Excel. XML. PDF				

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



Section: Edit External System IDs

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.

Producer Business Rules					Тор		
					Тор		
□ External Sys IDs					Тор		
External System Type	Exter	nal System Identifier	Business Unit	Primary	Inactive		
Distribution Code	1934	PC	(Personal / Commercial)				
Add/Update/Delete External System Identifiers							
Contact Information					Тор		

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

	Maintain External System Identifiers								
💂 EASL	EY, CORA Unrated					Searc	h Producer		
External Sy	stem ID	Active BU	NPN	Resident State/License	Additional States/	Licenses			
			100000028	VA / 736178		005			
Current	Current External System Identifiers Add New External System Identifier								
Delete	External System Typ	pe External :	System ID	Business Unit	Primary	Inactive			
	Agency Code	SF101	DEFA	ULT (DEFAULT)			Edit		
	Distribution Code	1934	PC (P	ersonal / Commercial)	v		Edit		
Delete							Return		
Add/Up	date External System	Identifiers					Clear		
External	System Type	External Sys	tem ID	Business Unit		Primary	Inactive		
		~	Generate	ID	~				
-					Save	rn Save a	ind 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

6. 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								
a EASLI	EY, CORA Unrated						Search	n Producer	
External Sys	stem ID	Active BU	NPN	Re	sident State/License	Additional State	s/Licenses		
			10000	00028 V	A / 736178		00005		
Current	External System Ide	entifiers				Add New Ex	ternal Syster	n Identifier	
Delete	External System T	Гуре	External System ID		Business Unit	Primary	Inactive		
	Agency Code	SF10	1	DEFAULT (DE	FAULT)			Edit	
	Distribution Code	1934		PC (Personal	/ Commercial)	V		Edit	
Delete								Return	
Add/Upd	late External Syster	n Identifiers						Clear	
External	System Type	Ext	ernal System ID		Business Unit		Primary	Inactive	
Distributio	on Code	✓ 19	34	Generate ID	LIFE (Life and Annuity)	~	✓		
						Save Re	turn Save a	nd Return	

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

	Maintain External System Identifiers									
a EASLE	Y, CORA Unrated						Searc	h Producer		
External Syst	tem ID	Active BU	NPN	Re	sident State/License	Additiona	I States/Licenses			
			T 10000	00028 V	A/736178	AZ /	100000005			
Current E	Current External System Identifiers Add New External System Identifier									
Delete	External S	system Type	External System	ID	Business Un	it Prima	ry Inactive			
	Agency Code		SF101	DEFAUL	(DEFAULT)			Edit		
	Distribution Code		1934	LIFE (Life	e and Annuity)	V		Edit		
Delete								Return		
Add/Upd	ate External Sy	stem Identifiers	8					Clear		
External S	System Type		External System ID		Business Uni	t	Primary	Inactive		
		~		Generate ID		~				
						Save	Return Save	and Return		

Section: Inactivate or Delete External System IDs

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.

Đ	Producer Business Rules					Тор	
Đ	Resident States					Тор	
E	External Sys IDs					Тор	
	External System Type	Exte	rnal System Identifier	Business Unit	Primary	Inactive	
0	Distribution Code	1934	P				
	Add/Update/Delete External System Identifiers						
Ŧ	Contact Information					Тор	

- 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									
a EASL	EY, CORA Unrated							Search	n Producer	
External Sys	stem ID	Active BU		NPN	Resi	dent State/License	Additional States	/Licenses		
			IULT	100000028	VA	/ 736178	AZ / 100000)0005		
Current	External System	Identifiers					Add New Ext	ernal Syster	n Identifier	
Delete	External S	ystem Type	Extern	al System ID		Business Unit	Primary	Inactive		
	Agency Code		SF101		DEFAULT	(DEFAULT)			Edit	
	Distribution Code		1934		LIFE (Life a	and Annuity)			Edit	
Delete									Return	
Add/Upd	late External Sys	stem Identifie	ers						Clear	
External	System Type		External Syst	em ID		Business Unit		Primary	Inactive	
Distributio	on Code	~	1934	Genera	ate ID	LIFE (Life and Annuity)	~		✓	
							Save	urn Save a	nd Return	



Section: Inactivate or Delete External System IDs

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

	Maintain External System Identifiers								
a EASL	EY, CORA Unrated					Search	h Producer		
External Sys	stem ID	Active BU	NPN	Resident State/License	Additional States/I	Licenses			
			100000028	VA / 736178		1005			
Current	External System	Identifiers	External System ID	Rusiness Unit	Add New Exte	rnal Syster	n Identifier		
	Agency Code	SF101	External System ID	DEFAULT (DEFAULT)		mactive	Edit		
	Distribution Code	1934		LIFE (Life and Annuity)			Edit		
Delete							Return		
Add/Upd	date External Syst	tem Identifiers					Clear		
External	System Type	External	System ID	Business Unit		Primary	Inactive		
		~	Genera	ate ID	~				
-					Save	n Save a	nd Return		

Delete an External System ID

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

1. 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								
💂 EASL	EY, CORA Unrated							Searc	h Producer
External Sys	stem ID	Active BU	N	PN	Re	sident State/License	Additional	States/Licenses	
		⊡ DEFA	ULT 1	00000028	V	A/736178	⊞ AZ/1	000000005	
Current	Current External System Identifiers Add New External System Identifier Delete External System Type External System ID Business Unit Primary Inactive								
	Agency Code		SF101		DEFAUL	T (DEFAULT)			Edit
	Distribution Code		1934		LIFE (Lif	e and Annuity)			Edit
Delete									Return
Add/Upc	date External Sys	stem Identifie	rs						Clear
External	System Type		External System	ID		Business Unit		Primary	Inactive
		~		Genera	te ID		~		
							Save	Return Save a	and Return

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Section: Inactivate or Delete External System IDs

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**.

Sircon Lansing Mutual	Meagan Brandt Meagan Brandt		
Licensing Companies Inquiries Express Services Administra	бото		
Find existing producers with Review/Update Producer or Advanced Producer Search		Dashboard	
Producer Network Add Producer	ADELBERG, MEAGAN	Producer Administration	CLASSIC
Add Producers in Bulk Bulk Transactions & Service Requests	SPINGOLA, JILL	Bulk Transactions & Service Requests	CLASSIC

- 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.

▶ Sircon	UAT 25647	🔺 🔍 🔽 🖽
Producer Onboarding		Switch to Comp Switch to Ph Sw
Personal Work Queue Personal Wo My Requests (0) Department Queues	rk Queue - My Requests that are in your personal queue.	Account Options
Bulk.(0) Request Paner.(0) ID Principal.(0) Request Recruiter.(1) Nothing found to dist X-Bulk.Child.(0) Principal.(0)	Initiated Date Status Cun play.	rrent Milestone Recruiter Actions

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

Sircon	2	JAT 5647		• .	- III
🛾 🍪 Workspace				🕑 Switch To Comp 🔢 Switch t	o PM 🦉 Help
Start New Request					
					*
		Packet Type			
		Packet Type			
			Continue		

- 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 Tyne Bulk - External System Id Inactivation Continue 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.

Packet Type Upload Prod	ucer CSV File	
	Upload Instructions	1
	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)	
	C. NPM D. Name (Individual Last Name or Agency Name) E. FirstMame (Individual First Name)	
	r. Email Address G. External System Id Termination Type ALL ALL_BY_TYPE	
	SPECIFIC H. External System 1d Type Code(s) Valid External ID Type Code List - Description AGEN(VTID - Agency ID AGTCD - Agency ID	
	AGENTID - Agent ID DEFAULT - Odavalt DISTCD - Distribution Code FMICOMCD - Fortix - Code	
	I. External System Id	1

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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
Α	Entity Type	Use "IL" to indicate individual licensee
С	National Producer ID (NPN)	Type the full NPN number of the producer
D	Name	Type the Last Name of the producer
G	External System ID Termination Type	 Type ALL to inactivate all the external system IDs. If you use this option, you can leave columns "H" and "I" blank. Type ALL_BY_TYPE to inactivate external system IDs by type. If you use this option, you will need to enter the Ext System ID Type Code in column "H" (such as all AGENCYID). Type SPECIFIC 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.

А	В	С	D	E	F	G	Н	I
Entity Type	TIN	NPN	Name	First Name	Email Address	External System ID Termination Type	External System ID Type Codes	External System ID
IL		100000028	Easley			ALL_BY_TYPE	DEFAULT	

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

Column	Field Name	Description
Α	Entity Type	Use "IL" to indicate individual licensee
В	TIN (Taxpayer ID)	Type the 9-digit SSN of the producer (with or without dashes)
D	Name	Type the Last Name of the producer
G	External System ID Termination Type	 Type ALL to inactivate all the external system IDs. If you use this option, you can leave columns "H" and "I" blank. Type ALL_BY_TYPE to inactivate external system IDs by type.



Section: Inactivate or Delete External System IDs

	 If you use this option, you will need to enter the Ext System ID Type Code in column "H" (such as all AGENCYID). Type SPECIFIC 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 **<u>must be deleted</u>** before creating the final CSV file.

А	В	С	D	E	F	G	Н	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
Α	Entity Type	Use " AGY " to indicate an agency/firm
В	TIN (Taxpayer ID)	Type the 9-digit Employer Identification Number
D	Name	Type the full Name of the agency/firm. It must
G	External System ID Termination Type	 Match the name in the producer record. Type ALL to inactivate all the external system IDs. If you use this option, you can leave columns "H" and "I" blank. Type ALL_BY_TYPE to inactivate external system IDs by type. If you use this option, you will need to enter the Ext System ID Type Code in column "H" (such as all AGENCYID). Type SPECIFIC 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 **<u>must be deleted</u>** before creating the final CSV file.

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

Section: Inactivate or Delete External System IDs

	If you typed SPECIFIC in the External System ID Termination Type field, you need to type the External System ID 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:

А	В	С	D	E	F	G	Н	I
AGY	00-6233077		Dean and Davis Insurance Agency			Specific		8253
IL		100000028	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 <u>delete the header</u> before moving on to the next step.

- 20. When you are finished, from the **File** menu, select **Save As**.
- 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**.

Bulk Spreadshe	et Reference • Saved	Lauren Hall	🎙 🖗			o	
e	Save a Copy						
☆ Home New	L Recent	↑ ▷ OneDrive - Vertafore, Inc. > Bulk Uploads Bulk Spreadsheet Reference_Inactivate Ext Syst IDs			J		1
	Vertafore, Inc.	CSV (Comma delimited) (*.csv)			-) I	Save	
Den Open	OneDrive - Vertafore, Inc. Ihall@vertafore.com	Excel Macro-Enabled Template (*.xltm) Excel 97-2003 Template (*.xlt) Text (Tab delimited) (*.txt) Unicode Text (*.txt)					
Save a Copy	Sites - Vertafore, Inc. Ihall@vertafore.com	XML Spreadsheet 2003 (*xml) Microsoft Evcel 5.0/95 Workbook (* vic)			ł		
Print	Other locations	CSV (Comma delimited) (*.csv)					
Share		Text (Ms-DOS) (*.txt)			8 AM	_	
Export	Add a Place	CSV (Macintosh) (*.csv) CSV (MS-DOS) (*.csv)			PM	_	
Publish	Browse	SYLK (Symbolic Link) (*.slk) Excel Add-in (*.slx)			1 AM		
Close		Excel 97-2003 Add-in (*.xla) PDF (*.pdf)			7 AM		
Account		XPS Document (* xps) Strict Open XML Spreadsheet (*.xlsx)			9 AM		
Feedback		OpenDocument Spreadsheet (*.ods)					
Options		Bulk Spreadsheet Reference_BI Investigation	6/2	/2023 1	13 PM	*	

- 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

Start New Request	
Packet Type Upload Producer CSV File	
Chrone Bio Concerns Co	
Back	
	· · · · · · · · · · · · · · · · · · ·
Privacy Statement Legal Disclaimer	Powered by Sircon

- 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.

g Open	× •	s Lauren-Wertaforn Inc. s. Bulk Holoade					v a	Search Bully Deleade		~ •
		> caurent - vertailore, inc. > bolk opioada					• 0	Search Bark opioaus		~
Organize	e * New folde	r						= -	· 🔳	0
> 📜 E	Bulk Uploads	Name	Slatus	Date modified	Tyrup	Size				
> 🄁	Carrier Fast Tra	Bulk Spreadsheet Reference_Ext System ID Upd	0	6/27/2023 11:27 AM	Microsoft Excel Com	1 KB				
> 📩 (Course Outline	E Buik Spreadsheet Reference_tmail updates		0/27/2023 10:34 MM	MICrosoft Excer Com	T ND				
> 📜	Desktop	Bulk Spreadsheet Reference_PST	\odot	6/27/2023 9:45 AM	Microsoft Excel Com	1 KB				
> 🗖	Documents	Bulk Spreadsheet Reference_Reg Course Updates	\odot	6/27/2023 9:45 AM	Microsoft Excel Com	1 KB				
> 🗖 เ	Lauren @ Worl	Bulk Spreadsheet Reference_Reg Courses	0	6/26/2023 4:47 PM	Microsoft Excel Com	1 KB				
> 💴	Microsoft Tean	Bulk Spreadsheet Reference_Course Completions	\odot	6/26/2023 4:19 PM	Microsoft Excel Com	1 KB				
> 🐂	Pictures	Bulk Spreadsheet Reference_BU Inactivation	\odot	6/26/2023 3:04 PM	Microsoft Excel Com	1 KB				
> 📜 F	Recordings	Bulk Spreadsheet Reference_BU Update	\odot	6/26/2023 2:00 PM	Microsoft Excel Com	1 KB				
> 🐂	Snagit	Bulk Spreadsheet Reference_BI Investigation	\odot	6/26/2023 1:13 PM	Microsoft Excel Com	1 KB				
> 🔙	LogoAnimatio	Bulk Spreadsheet Reference 11	\odot	6/26/2023 10:51 AM	Microsoft Excel Com	1 KB				
> 📥 01	IneDrive	Bulk Spreadsheet Reference_Address Update 1	0	6/26/2023 10:47 AM	Microsoft Excel Com	1 KB				
		Bulk Spreadsheet Reference_Address Update	\odot	6/26/2023 10:19 AM	Microsoft Excel Com	1 KB				
Da	ocuments 🖈	Bulk Upload_6.14.23	\odot	6/14/2023 12:09 PM	Microsoft Excel Com	1 KB				
Pi	ictures 🖈	Bulk Connection Update_6.14.23_2	0	6/14/2023 11:58 AM	Microsoft Excel Com	1 KB				
	File nar	ner Bulk Spreadsheet Reference Ext System ID Undate						All Files		
		and four observations are a service of the service						Open	Cancel	

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

Enter a name for this transaction (you can use this name to find your transaction later) Inactivate Ext System IDE_6.27.23 Choose a CSV Data File to Upload Choose File Bulk Spreads Syst IDs.csv	
Back	*
Privacy Statement Legal Disclaimer	Powered by Sircon

Section: Inactivate or Delete External System IDs

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

Sircon	UAT 25647						- 1
Producer Onboarding				Switch To Comp 🔡 Switch	:h to PM	🗿 Available	e Tasks 🦉 He
Personal Work Queue @ My.Requests (1) Department Queues Buik (0) Page: (0) Principal (0) Descript (1)	Personal Work Queue - My Requests Shows all requests that are in your personal queue.					Bato	h Actions
Kettriner (1) X-Bulk Child (0) Error Queues Failed BIs (0) Auto-Pilot Exceptions (291)	Request Name 10296274 Inactivate Ext System IDs_6.27.23	Initiated Date 06/27/23	<u>Status</u> Pending	Current Milestone Assigned to Licensing Dep	Recruiter	Current Workflow Step	Actions
Filter Options clear all View >> By Current Owner	Key: Move to Dept Queue Queve this Request One request found. Export current page to: CSV Excel. XML PDE Export all 1 records to: CSV Export all 1 records to:						

Section: Configure External System Type Codes

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.

Sircon	UAT 25647	🔺 🔍 👻 🔛
Licensing - Companies - Inquiries - Express Services -	Administration 🔫	🐼 🎽 🔍 Producer Quick Search
Find existing producers with Review/Update Producer or Advanced Producer Sea	Online Help User Security	Recently Viewed Producers
Producer Network	Configure My Profile >	ORA 15 minutes ago DAVIS INSURANCE AGENCY 07-28-2023
Add Producer Add Producers in Bulk Bulk Transactions & Service Requests	Configure System > Education Credentialing >	Maintain Codes 07-18-2023 Maintain Business Unit 07-17-2023
Update Producer Information	Data Reconciliation >	Maintain Business Unit Cost Center Show All
Add/Activate Licenses/Qualifications Correct License Data Maintain Contact Information	Sales Authorization >	Add Hierarchy Iemplates Maintain Hierarchy Templates
Manage Appointments	Contact Us Logout	Maintain Hierarchy Levels Administer Producer Business Rules
Add Appointments Terminate Appointments Approve/Deny Appointments Review Rejected Appointments	Today: 0 Last 7 D Last 30	View Code Use Indicators Locations and Departments

- 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.

		INDATOKOTY000_00	Inuvidual Organization Association Code
0	Đ	INDV_ORG_ASSC_POS_CD	Individual Organization Association Position Code
0	Đ	INTRFC_TYPE_CD	Interface Type Code
0	Ŧ	MAIL_LBL_CAT_CD	Mailing Label Category Code
0	Ŧ	MKT_STRGY_TYPE_CD	Market Strategy Type Code
0	Ŧ	NASD_SERIES_TYPE_CD	NASD Series Type Code
0	Ŧ	ORG_ADDR_CNTCT_TYPE_CD	Organization Address Contact Type Code
0	Ŧ	ORG_ALS_TYPE_CD	Organization Alias Type Code
0	Ŧ	ORG_ASSC_ASSC_CD	Organization Association Code
0	Ŧ	OTHR_ORG_TYPE_CD	Other/Misc. Organization Type Code
0	Đ	PAYMENT_FREQUENCY_CD	Payment Frequency Code
0	Ŧ	PRDCR_APPL_UNAPRV_RSN_CD	Producer Application Unapproved Reason Code
0	Ŧ	PRDCR_LMT_RSN_TYPE_CD	Producer Limitation Reason Type Code
0	+	PRDCR_RJCT_RQST_RSN_CD	Producer Rejected Request Reason Code

Section: Configure External System Type Codes

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

0	Ŧ	INDV_ORG_ASSC_POS_CD			Individual Organiza	tion Association	Position Code	9		
0	Ξ	INTRFC_TYPE_CD		1	Interface Type Code					
		Codes								
		Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment	
		AGYCD	Agency Code	Active	05-01-2020			Agency Code		
		AGENCYID	Agency Id	Active	04-26-2011			Agency Id		
		AGTCD	Agent Code	Active	08-06-2019			Agent Code		
		AGENTID	Agent Id	Active	04-26-2011			Agent Id		
		DISTCD	Distribution Code	Active	08-06-2019			Distribution Code		
		ENTCONCD	Entity Contact Code	Active	08-06-2019			Entity Contact Code		
0	ŧ	MAIL_LBL_CAT_CD		1	Mailing Label Categ	ory Code				
0	Đ	MKT_STRGY_TYPE_	CD	1	Market Strategy Typ	e Code				

Edit External System ID Codes

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

	Ξ	INTRFC_TYPE_CD	-		Interface Type Cod	9				
		Codes								
		Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Co	omment
		AGYCD	Agency Code	Active	05-01-2020			Agency Code		
		AGENCYID	Agency Id	Active	04-26-2011			Agency Id		
		AGTCD	Agent Code	Active	08-06-2019			Agent Code		
		AGENTID	Agent Id	Active	04-26-2011			Agent Id		
		DISTCD	Distribution Code	Active	08-06-2019			Distribution Code		
		ENTCONCD	Entity Contact Code	Active	08-06-2019			Entity Contact Code		
0	ŧ	MAIL_LBL_CAT_CD			Mailing Label Cate	jory Code				
0	÷	MKT_STRGY_TYPE_	_CD		Market Strategy Ty	be Code				
0	ŧ	NASD_SERIES_TYP	E_CD		NASD Series Type	Code				
0	÷	RGLTNG_BDY_CD			Regulating Body C	ode				
0	ŧ	RGLTRY_BDY_CD			Regulatory Body C	ode				
0	Ŧ	RQD_ITEM_TYPE_C	D		Required Item Type	Code				
0	ŧ	RSTR_TYPE_CD			Restriction Type Co	de				
0	÷	SM_ROLE_CD			Staff Member Role	Code				
0	ŧ	SUPPRESS_LETTER	R_TYPE_CD		Suppressible Letter	Type Code				
0	±	SW_PROD_CD			Software Product C	ode				
0	ŧ	TRMN_VEST_TYPE_	CD		Termination Vesting	Type Code				
									Next	Return

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

Section: Configure External System Type Codes

Current Code	Group		Maintai	n Codes			
	Code Group					Description	
INTRFC_TYPE_C	D			Interface Type Co	ode		
Codes							Add a New Cod
Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
AGYCD	Agency Code	Active	05-01-2020			Agency Code	Edit
AGENCYID	Agency Id	Active	04-26-2011			Agency Id	Edit
AGTCD	Agent Code	Active	08-06-2019			Agent Code	Edit
AGENTID	Agent Id	Active	04-26-2011			Agent Id	Edit
DISTCD	Distribution Code	Active	08-06-2019			Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019			Entity Contact Code	Edit
Add/Update Co	des						
Code	Short Description	Status	Begin Date	End Date	Sy: Req	stem Long Descr juired	iption
	Act	ive 🗸 08-2	25-2023				Clea
Comment							
	L					Pro	evious Save Return

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.

Current Code (Group		Maintai	in Codes			
	Code Group					Description	
INTRFC_TYPE_CO	D			Interface Type C	ode		
Codes							Add a New Cod
Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
AGYCD	Agency Code	Active	05-01-2020			Agency Code	Edit
AGENCYID	Agency Id	Active	04-26-2011			Agency Id	Edit
AGTCD	Agent Code	Active	08-06-2019			Agent Code	Edit
AGENTID	Agent Id	Active	04-26-2011			Agent Id	Edit
DISTCD	Distribution Code	Active	08-06-2019			Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019			Entity Contact Code	Edit
Add/Update Cod	les						
Code	Short Description	Status	Begin Date	End Date	e Sys Req	stem Long Descrip uired	ition
	Ad	tive 🗸 08-2	25-2023				Clea
Comment							
						Prev	ious Save Return

- 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**.

			Maintai	n Codes			
Current Code	Group Code Group					Description	
INTRFC_TYPE_C	D			Interface Type Co	ode	Doonphon	
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			Agency Code	Edit
AGENCYID	Agency Id	Active	04-26-2011			Agency Id	Edit
AGTCD	Agent Code	Active	08-06-2019			Agent Code	Edit
AGENTID	Agent Id	Active	04-26-2011			Agent Id	Edit
DISTCD	Distribution Code	Active	08-06-2019			Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019			Entity Contact Code	Edit
Add/Update Cod	les						
Code	Short Description	Status	Begin Date	End Date	e Sys Req	stem Long Descri uired	ption
AGTRGN	Agent Region Ac	tive 🖌 08-2	5-2023			Agent Region	Clear
Comment							
						Pre	vious Save Return

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

			Mainta	in Codes			
Current Code (Group						
	Code Group					Description	
INTRFC_TYPE_CI	D			Interface Type Co	ode		
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			Agency Code	Edit
AGENCYID	Agency Id	Active	04-26-2011			Agency Id	Edit
AGTCD	Agent Code	Active	08-06-2019			Agent Code	Edit
AGENTID	Agent Id	Active	04-26-2011			Agent Id	Edit
AGTRGN	Agent Region	Active	08-25-2023			Agent Region	Edit
DISTCD	Distribution Code	Active	08-06-2019			Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019			Entity Contact Code	Edit
Add/Update Cod	les						
Code	Short Description	Status	Begin Date	End Date	Sy: Req	stem Long Descrij juired	otion
	Ac	tive 🗸 08-	25-2023		. 9		Clear
Comment							
						Prev	rious Save Return

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.

Current Code (Group		Maintai	n Codes			
	Code Group					Description	
INTRFC_TYPE_CI	D			Interface Type Co	ode		
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			Agency Code	Edit
AGENCYID	Agency Id	Active	04-26-2011			Agency Id	Edit
AGTCD	Agent Code	Active	08-06-2019			Agent Code	Edit
AGENTID	Agent Id	Active	04-26-2011			Agent Id	Edit
AGTRGN	Agent Region	Active	08-25-2023			Agent Region	Edit
DISTCD	Distribution Code	Active	08-06-2019			Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019			Entity Contact Code	Edit
Add/Update Cod	des						
Code	Short Description St	atus	Begin Date	End Date	Sys Req	stem Long Descrip uired	otion
	Activ	re 🖌 08-2	5-2023				Clear
Comment							
L	<u> </u>					Prev	ious Save Return

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

	Code Group					Description	
NTRFC_TYPE_C)			Interface Type Co	ode		
Codes							Add a New Co
Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
AGYCD	Agency Code	Active	05-01-2020			Agency Code	Edit
AGENCYID	Agency Id	Active	04-26-2011			Agency Id	Edit
AGTCD	Agent Code	Active	08-06-2019			Agent Code	Edit
AGENTID	Agent Id	Active	04-26-2011			Agent Id	Edit
AGTRGN	Agent Region	Active	08-25-2023			Agent Region	Edit
DISTCD	Distribution Code	Active	08-06-2019			Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019			Entity Contact Code	Edit
Add/Update Cod	es						
Code	Short Description S	itatus	Begin Date	End Date	e Sys Req	stem Long Descri uired	ption
AGENCYID	Agency ID Acti	ve 🗙 04-2	26-2011 📃		•	Agency ID	Cle
_							

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Section: Configure External System Type Codes

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

Current Code G	iroup						
NTREA T/RE AR	Code Group			Interface Trace C		Description	
NTREC_TYPE_CD)			Interface Type C	ode		
odes							Add a New Cod
Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
AGYCD	Agency Code	Active	05-01-2020			Agency Code	Edit
AGENCYID	Agency ID	Active	04-26-2011			Agency ID	Edit
AGTCD	Agent Code	Active	08-06-2019			Agent Code	Edit
GENTID	Agent Id	Active	04-26-2011			Agent Id	Edit
AGTRGN	Agent Region	Active	08-25-2023			Agent Region	Edit
DISTCD	Distribution Code	Active	08-06-2019			Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019			Entity Contact Code	Edit
dd/Update Cod	es						
Code	Short Description	Status	Begin Date	End Dat	e Sys Requ	tem Long Descri	ption
	Act	ive 🖌 08-2	5-2023		<u> </u>		Clea

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.

1. Click Edit next to the code you need to inactivate.

Current Code	Group							
	Code Group					Description		
INTRFC_TYPE_C	D			Interface Type C	Code			
Codes							Add a Ne	w Code
Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment	
AGYCD	Agency Code	Active	05-01-2020			Agency Code		Edit
AGENCYID	Agency ID	Active	04-26-2011			Agency ID		Edit
AGTCD	Agent Code	Active	08-06-2019			Agent Code		Edit
AGENTID	Agent ID	Active	04-26-2011			Agent ID		Edit
AGTRGN	Agent Region	Active	08-25-2023			Agent Region		Edit
DISTCD	Distribution Code	Active	08-06-2019			Distribution Code		Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019			Entity Contact Code		Edit
Add/Update Co	des							
Code	Short Description S	tatus	Begin Date	End Dat	e Sys Req	stem Long Descrip juired	tion	
	Activ	/e 🗸 08-2	5-2023		•			Clear
6								



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**.

	Code Group	•				Description	
INTRFC_TYPE_CE)			Interface Type Co	ode		
Codes							Add a New Cod
Code	Short Description	Status	Begin Date	End Date	System Required	Long Description	Comment
AGYCD	Agency Code	Active	05-01-2020			Agency Code	Edit
AGENCYID	Agency ID	Active	04-26-2011			Agency ID	Edit
AGTCD	Agent Code	Active	08-06-2019			Agent Code	Edit
AGENTID	Agent ID	Active	04-26-2011			Agent ID	Edit
AGTRGN	Agent Region	Active	08-25-2023			Agent Region	Edit
DISTCD	Distribution Code	Active	08-06-2019			Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019			Entity Contact Code	Edit
Add/Update Cod	es						
Code	Short Description	Status	Begin Date	End Date	Sy: Req	stem Long Desci juired	ription
AGTRGN	Agent Region	Historical 🗸 08-	-25-2023	08-25-2023	_	Agent Region	Clea
Comment							
	<u> </u>					 Pr	evious Save Return

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

Current Code	Group		Maintai	n Codes			
Current Code	Group Code Grou	p				Description	
INTRFC_TYPE_C	D			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			Agency Code	Edit
AGENCYID	Agency ID	Active	04-26-2011			Agency ID	Edit
AGTCD	Agent Code	Active	08-06-2019			Agent Code	Edit
AGENTID	Agent ID	Active	04-26-2011			Agent ID	Edit
AGTRGN	Agent Region	Historical	08-25-2023	08-25-2023		Agent Region	Edit
DISTCD	Distribution Code	Active	08-06-2019			Distribution Code	Edit
ENTCONCD	Entity Contact Code	Active	08-06-2019			Entity Contact Code	Edit
Add/Update Cod	des						
Code	Short Description	Status	Begin Date	End Date	Syster Requir	m Long Descri	ption
		Active V 08-	25-2023		•		Clear
Comment							
						Pre	vious 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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Section: APPENDIX 1: Sircon for Carriers Help Resources

APPENDIX 1: Sircon for Carriers Help Resources

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

- My Vertafore
- Sircon Support

My Vertafore

My Vertafore is our free online customer support portal and knowledge base. At <u>My</u> <u>Vertafore</u> 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. <u>Click here to email Support</u> or call 877-876-4430.

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Section: APPENDIX 2: Document History

APPENDIX 2: Document History

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



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