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YOUR
POSSIBLE.

SIRCON FOR CARRIERS

Firm Associations

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Overview

Introduction and Background

Numerous states require carriers and firms to track and manage agent-to-agency affiliations. Some states allow firms to share an appointment with affiliated individual producers, allowing the agents to conduct business under the firm's appointment and potentially reducing a carrier's appointment fees in those states.

In Producer Central, you can create associations to tie individual agents to agencies or brokerages. These associations are created one at a time for each producer. The associations stay within Producer Central. If a state regulatory body requests a list of the associations for a firm, you can download a report that lists all the associations.

Associations are also known as affiliations.

What will be covered?

In this quick guide, we will review how to add firm associations to individuals. We will also review how to correct association data.

Who should use this document?

Any users of Producer Central that need to view or update associations between firms and individual agents.

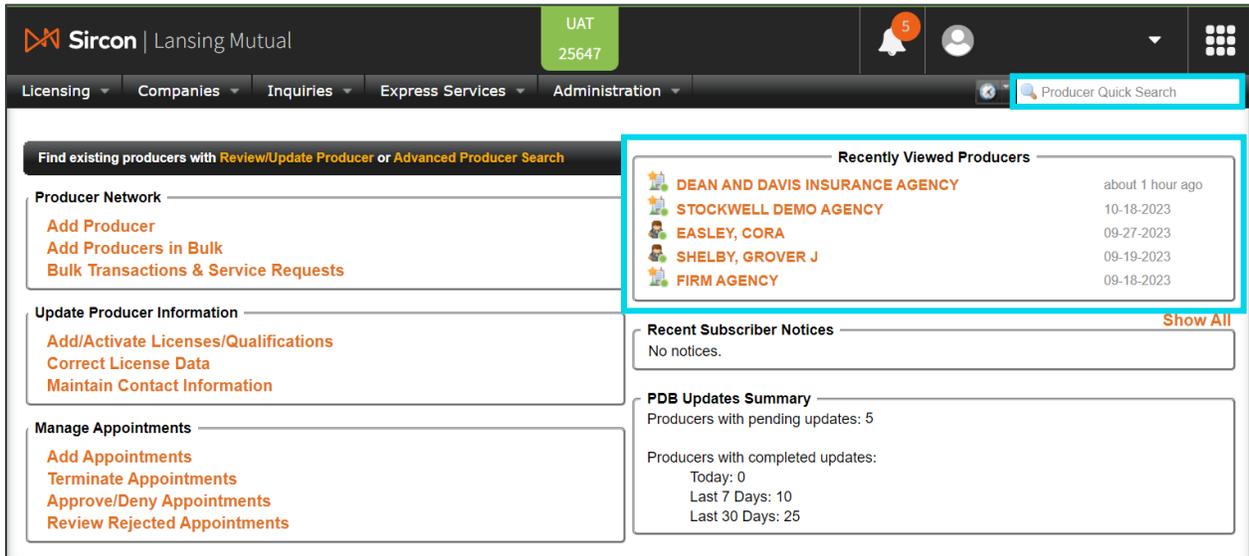
When should you use this document?

Use this document when you need to manage the firm associations for your organization.

View Firm Associations

There are two different ways to view Firm Associations. You view all the firms that an individual is associated with, or you can view all the individuals that are associated with a single firm.

Start by navigating to the producer record of either the firm or the agency that you need to see. To do this, search for a producer using the **Producer Quick Search** or open the producer from the **Recently Viewed Producers** list.



The screenshot shows the Siron Lansing Mutual interface. The top navigation bar includes 'Licensing', 'Companies', 'Inquiries', 'Express Services', and 'Administration'. A search bar labeled 'Producer Quick Search' is visible. The main content area is divided into several sections:

- Producer Network:** Includes links for 'Add Producer', 'Add Producers in Bulk', and 'Bulk Transactions & Service Requests'.
- Update Producer Information:** Includes links for 'Add/Activate Licenses/Qualifications', 'Correct License Data', and 'Maintain Contact Information'.
- Manage Appointments:** Includes links for 'Add Appointments', 'Terminate Appointments', 'Approve/Deny Appointments', and 'Review Rejected Appointments'.
- Recently Viewed Producers:** A list of producers with their names and last viewed dates:

Producer Name	Last Viewed
DEAN AND DAVIS INSURANCE AGENCY	about 1 hour ago
STOCKWELL DEMO AGENCY	10-18-2023
EASLEY, CORA	09-27-2023
SHELBY, GROVER J	09-19-2023
FIRM AGENCY	09-18-2023
- Recent Subscriber Notices:** Shows 'No notices.' with a 'Show All' link.
- PDB Updates Summary:** Shows 'Producers with pending updates: 5' and 'Producers with completed updates: Today: 0, Last 7 Days: 10, Last 30 Days: 25'.

Note: Refer to the [Adding and Searching for Producers](#) quick guide for detailed instructions about how to search for the record.

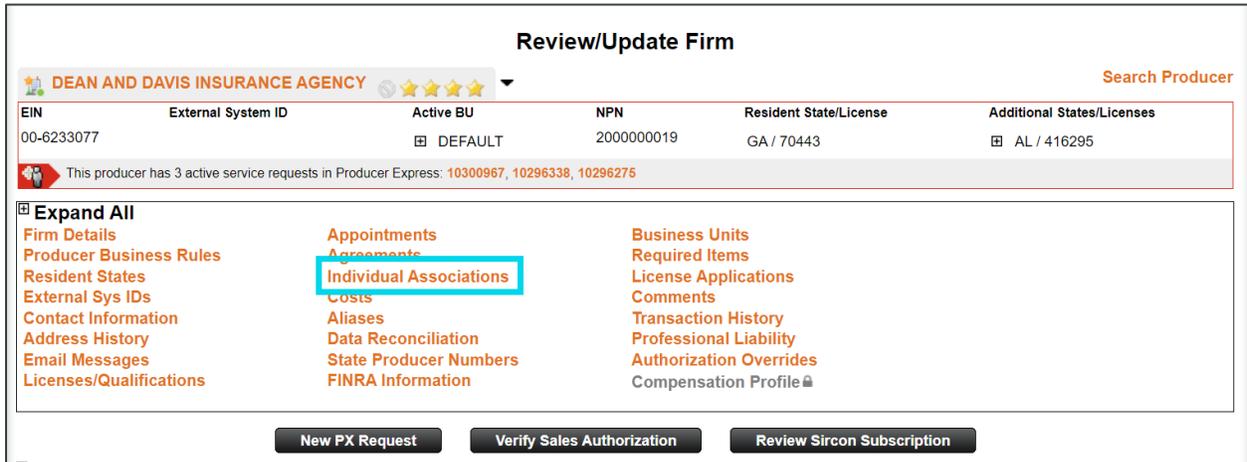
View Individual Associations

Follow these steps to view the individual associations that are connected to an agency or firm. The associations will appear in a report that you can download from Producer Central.

Note: In the example below, we are pulling a list of the associations for the Dean and Davis Insurance Agency.

Section: View Firm Associations

1. From a firm producer record, click the **Individual Associations** quick link.



Review/Update Firm

DEAN AND DAVIS INSURANCE AGENCY Search Producer

EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
00-6233077		DEFAULT	2000000019	GA / 70443	AL / 416295

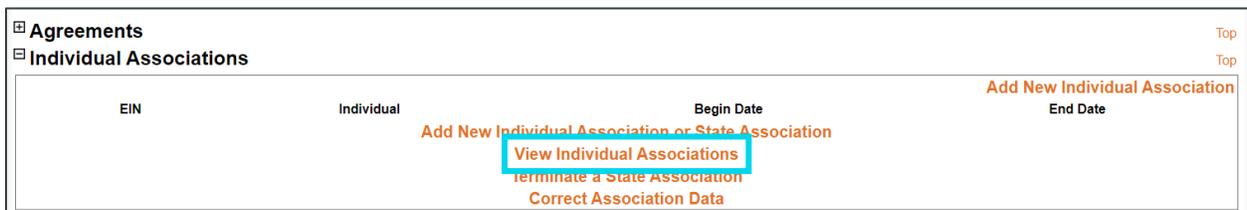
This producer has 3 active service requests in Producer Express: 10300967, 10296338, 10296275

Expand All

- Firm Details
- Producer Business Rules
- Resident States
- External Sys IDs
- Contact Information
- Address History
- Email Messages
- Licenses/Qualifications
- Appointments
- Agreements
- Individual Associations**
- Costs
- Aliases
- Data Reconciliation
- State Producer Numbers
- FINRA Information
- Business Units
- Required Items
- License Applications
- Comments
- Transaction History
- Professional Liability
- Authorization Overrides
- Compensation Profile

New PX Request Verify Sales Authorization Review Sircon Subscription

2. Click the **View Individual Associations** button.



Agreements Top

Individual Associations Top

Add New Individual Association

EIN	Individual	Begin Date	End Date

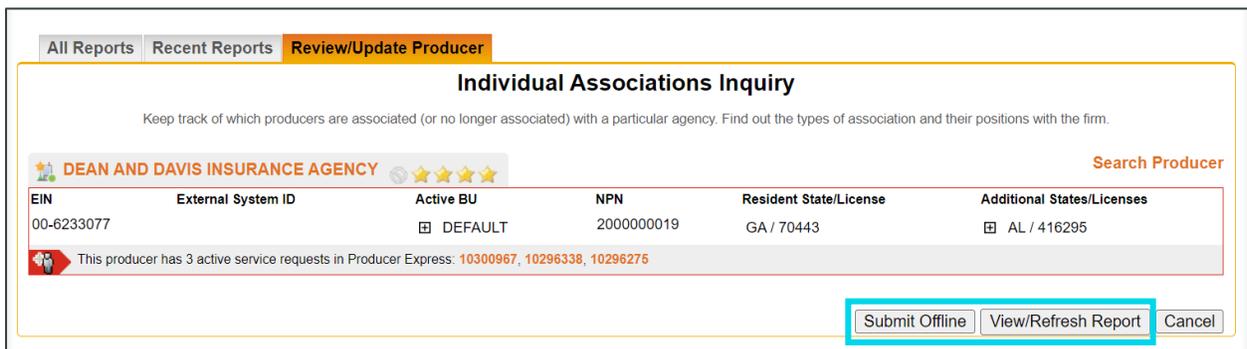
Add New Individual Association or State Association

View Individual Associations

Terminate a State Association

Correct Association Data

3. You will now see the *Individual Associations Inquiry* page. From here you can pull a list of all the producers.
4. Click the **Submit Offline** button to process the report in the background or click **View/Refresh Report** to run the report in real time.



All Reports Recent Reports **Review/Update Producer**

Individual Associations Inquiry

Keep track of which producers are associated (or no longer associated) with a particular agency. Find out the types of association and their positions with the firm.

DEAN AND DAVIS INSURANCE AGENCY Search Producer

EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
00-6233077		DEFAULT	2000000019	GA / 70443	AL / 416295

This producer has 3 active service requests in Producer Express: 10300967, 10296338, 10296275

Submit Offline **View/Refresh Report** Cancel

Note: In this example, we chose to click **Submit Offline**.

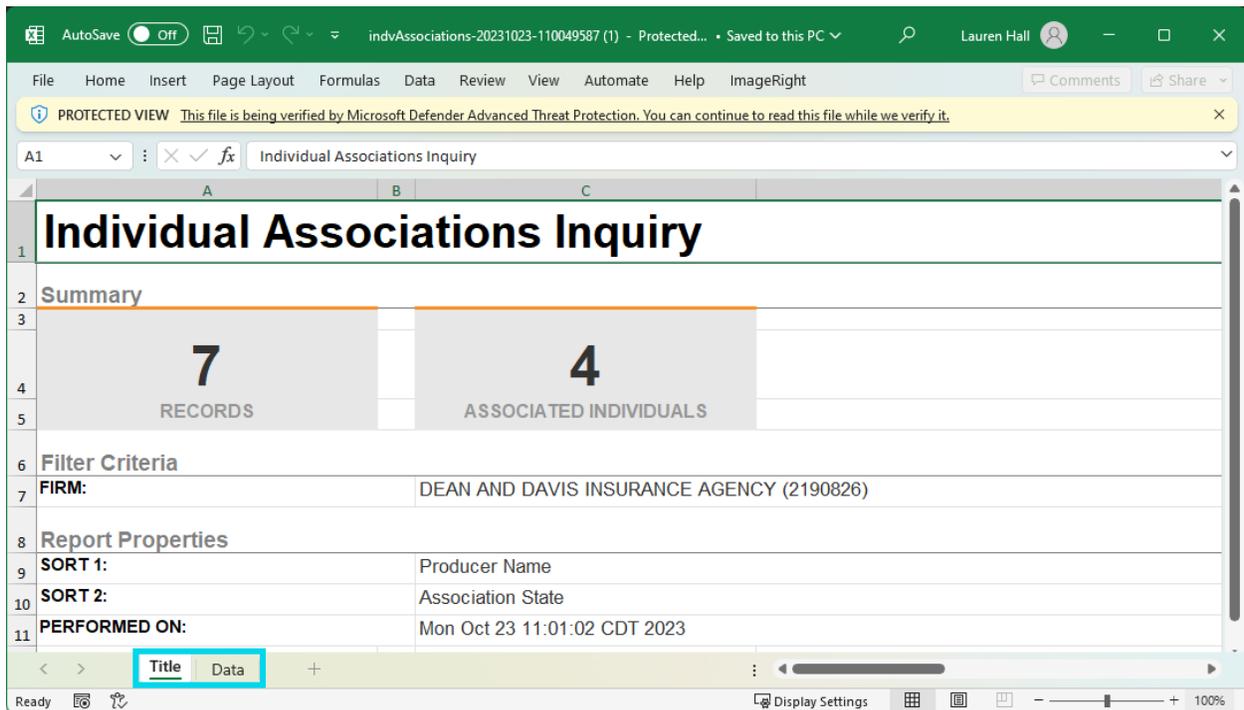
Section: View Firm Associations

5. Click the **Excel** button to download a copy of the report.

Delete	Name	Start Time	Completion Time	Submitted By	Status	Download
	Individual Associations Inquiry	10-23-2023 11:00 AM	10-23-2023 11:01 AM	Hall, Lauren	Succeeded	
	Producer Licenses Inquiry	10-17-2023 8:50 PM	10-17-2023 8:51 PM	Stockwell, Jessica	Succeeded	
	Producer Licenses Inquiry	10-17-2023 7:25 AM	10-17-2023 7:25 AM	Stom, Dennis	Succeeded	
	Producer Licenses Inquiry	10-05-2023 10:51 AM	10-05-2023 10:52 AM	Stockwell, Jessica	Succeeded	

6. You will now see the list of the individuals associated with the agency.

- The **Title** tab of the excel file contains a summary of the information.
- The **Data** tab contains a list of the Producers, their NPN numbers, their external system IDs, and the active business units.



The screenshot shows an Excel spreadsheet with the following content:

Individual Associations Inquiry	
Summary	
7 RECORDS	4 ASSOCIATED INDIVIDUALS
Filter Criteria	
FIRM:	DEAN AND DAVIS INSURANCE AGENCY (2190826)
Report Properties	
SORT 1:	Producer Name
SORT 2:	Association State
PERFORMED ON:	Mon Oct 23 11:01:02 CDT 2023

The 'Title' and 'Data' tabs are visible at the bottom of the spreadsheet.

Section: View Firm Associations

View Firm Associations

Follow these steps to view all the firm associations that are connected to an individual producer.

Note: In the example below, we are looking at all the associations for the producer Cora Easley.

1. Click the **Firm Associations** quick link.

Review/Update Individual


EASLEY, CORA
★ ★ ★ ★ ★

[Search Producer](#)

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
2050	DEFAULT	1000000028	VA / 736178	AZ / 1000000005

Expand All

- Individual Details
- Producer Business Rules
- Resident States
- External Sys IDs
- Contact Information
- Address History
- Email Messages
- Licenses/Qualifications
- Appointments

- Agreements
- Firm Associations**
- Employment History
- Aliases
- Data Reconciliation
- State Producer Numbers
- Required Items
- Background Investigations
- Business Units

- Locations and Departments
- Costs
- Education Credentials
- Course Completions
- Third Party Certifications
- License Applications
- Comments
- Transaction History
- Professional Liability

- Securities Information
- Authorization Overrides
- Compensation Profile

New PX Request

Verify Sales Authorization

Review Siron Subscription

2. You can now see a list of all the firm associations under the producer. You can click on the **Expand** button (+) to see the list of the association states and the active qualifications for both the agency and the individual.

Firm Associations

Top

EIN	Firm	Begin Date	End Date
00-6233077	DEAN AND DAVIS INSURANCE AGENCY	05-30-2023	
64-7646741	FAIRFIELD AGENCY	05-30-2023	10-23-2023

Association States

Add New Association State

State	Association Type	Position	Begin Date	End Date	State Registered
Virginia	Employee	Other	05-30-2023	10-23-2023	Yes

Active Qualifications for FAIRFIELD AGENCY

Qualifications

No Active Qualification exists.

Active Qualifications for EASLEY, CORA

Qualifications

Health

Life and Annuities

Property and Casualty

Variable Contracts

Correct Association Data

Note: In the example above, Cora Easley is associated with the Fairfield Agency in the state of Virginia.

Add Individual Firm Associations/Association States

Use the *Add Individual Firm Association/Association State* page to add a "record-only" affiliation between an individual producer (e.g., agent or broker) and a firm producer (e.g., agency or brokerage). When you add a new association, the information will update in Producer Central.

Firm associations are not sent to the states or the Producer Database (PDB). The information is just tracked in Producer Central.

Note: You will need to manually add associations for each producer. There is no way to add associations in bulk.

There are two different ways to add associations. You can:

- Add Firm Associations from an Individual Producer Record
- Add Individual Associations from a Firm Producer Record

Add Firm Association from Individual Producer Record

Follow this process to add a firm association from an individual's producer record.

1. Click the **Firm Associations** quick link.

Review/Update Individual

[Search Producer](#)

EASLEY, CORA ★★★★★

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
2050	☑ DEFAULT	1000000028	VA / 736178	☑ AZ / 1000000005

Expand All

<ul style="list-style-type: none"> Individual Details Producer Business Rules Resident States External Sys IDs Contact Information Address History Email Messages Licenses/Qualifications Appointments 	<ul style="list-style-type: none"> Agreements Firm Associations Employment History Aliases Data Reconciliation State Producer Numbers Required Items Background Investigations Business Units 	<ul style="list-style-type: none"> Locations and Departments Costs Education Credentials Course Completions Third Party Certifications License Applications Comments Transaction History Professional Liability 	<ul style="list-style-type: none"> Securities Information Authorization Overrides Compensation Profile
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New PX Request
Verify Sales Authorization
Review Sircon Subscription

2. Click **Add New Firm Association**.

Firm Associations Top

EIN	Firm	Begin Date	End Date
☑ 00-6233077	DEAN AND DAVIS INSURANCE AGENCY	05-30-2023	
☑ 64-7646741	FAIRFIELD AGENCY	05-30-2023	

Correct Association Data

Add New Firm Association

Section: Add Individual Firm Associations/Association States

3. Enter at least one of the search criteria to locate the name of the firm/agency for the association.
4. Click **Search**.

Add Individual Firm Association / Association State

Individual

 Search Producer

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
2050	<input type="checkbox"/> DEFAULT	1000000028	VA / 736178	<input type="checkbox"/> AZ / 1000000005

Search Firm

Please enter at least one of the search criteria below:

Firm Name <input style="width: 90%;" type="text" value="DEAN"/>	<input type="text"/>
EIN <input type="text"/>	NPN <input type="text"/>
License Number <input type="text"/>	License State <input type="text"/>
External System ID <input type="text"/>	Primary External ID Only <input type="checkbox"/>

Records Per Page:

5. You will now see the *Add Individual Firm Association/Association State*. Here you will see details about the Individual and the Firm.
6. In the **Active Qualifications** section, you will see all the qualifications that are held by both the individual and firm for each state. Click the **Expand** button (+) next to a state to see the qualification details for the firm and the individual.

Note: In the example below, the Dean and Davis Agency has several qualifications (such as casualty, life, and property) while the individual Cora Easley has no active qualifications in Alabama.

Add Individual Firm Association / Association State

Individual

 Search Producer

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
2050	<input type="checkbox"/> DEFAULT	1000000028	VA / 736178	<input type="checkbox"/> AZ / 1000000005

Firm

 Search Producer

EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
00-6233077		<input type="checkbox"/> DEFAULT	2000000019	GA / 70443	<input type="checkbox"/> AL / 416295

 This producer has 3 active service requests in Producer Express: [10300967](#), [10296338](#), [10296275](#)

Active Qualifications

State

State	Firm	Individual
<input type="checkbox"/> Alabama	DEAN AND DAVIS INSURANCE AGENCY	EASLEY, CORA
	Casualty	No Active Qualification exists.
	Life	
	Motor Club	
	Property	

Section: Add Individual Firm Associations/Association States

7. As you scroll down, you will see the **Current Association States** that are shared between the individual and firm.
8. To add an association, enter the following details:
 - **Association State:** Select the name of a state in which to add an individual-to-firm affiliation. Both the firm and individual producer should be licensed and hold active and matching qualifications in the selected state.
 - **Association Type:** Select a relationship of the individual to the firm in a selected association state.
 - **Position:** Select an employment title of the individual with the firm in a selected association state.
 - **Begin Date:** Enter the date on which the individual's association with the firm became effective in a selected association state. Use the MMDDYYYY date format.
 - **State Registered:**
 - Click **Yes** if the individual-to-firm association is recorded with the department of insurance in the selected association state.
 - Click **No** if the individual-to-firm association is not recorded with the department of insurance in the selected association state (i.e., recorded only in your company's internal records).
9. Click **Save and Return** to submit the association.

Current Association					
		Begin Date	End Date		
		05-30-2023			

Current Association States					
State	Association Type	Position	Begin Date	End Date	State Registered
Virginia	Agent/Broker	Secretary - Treasurer	05-30-2023		No
Florida	Agent/Broker	Other	05-30-2023	05-31-2023	No
Ohio	Agent	Other	05-30-2023	05-30-2023	No

Association State	California
Association Type	Agent
Position	Other
Begin Date	10-23-2023
State Registered	<input checked="" type="radio"/> Yes <input type="radio"/> No

Note: All data that is added or updated using this page will apply only to the affected record in Producer Central. The data will not be transmitted directly to states nor update state records.

Note: The **Association Type** and **Position** dropdown menus can be user-configured on the *Maintain Codes* page by users with administrative permissions. Refer to the [Administration in Producer Central Quick Guide](#).

Section: Add Individual Firm Associations/Association States

10. You will return to the individual's producer record. You can see that the firm was added by clicking the **Firm Associations** quick link.

Review/Update Individual

[Search Producer](#)

EASLEY, CORA ★ ★ ★ ★ ★

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
2050	DEFAULT	1000000028	VA / 736178	AZ / 1000000005

Expand All

<ul style="list-style-type: none"> Individual Details Producer Business Rules Resident States External Sys IDs Contact Information Address History Email Messages Licenses/Qualifications Appointments 	<ul style="list-style-type: none"> Agreements Firm Associations Employment History Aliases Data Reconciliation State Producer Numbers Required Items Background Investigations Business Units 	<ul style="list-style-type: none"> Locations and Departments Costs Education Credentials Course Completions Third Party Certifications License Applications Comments Transaction History Professional Liability 	<ul style="list-style-type: none"> Securities Information Authorization Overrides Compensation Profile
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11. The association will now appear in the **Firm Associations** list.

Firm Associations Top

[Add New Firm Association](#)

EIN	Firm	Begin Date	End Date
00-6233077	DEAN AND DAVIS INSURANCE AGENCY	05-30-2023	

[Add New Association State](#)

State	Association Type	Position	Begin Date	End Date	State Registered	
California	Agent	Other	10-23-2023		Yes	Terminate
Virginia	Agent/Broker	Secretary - Treasurer	05-30-2023		No	Terminate
Florida	Agent/Broker	Other	05-30-2023	05-31-2023	No	
Ohio	Agent	Other	05-30-2023	05-30-2023	No	

64-7646741	FAIRFIELD AGENCY	05-30-2023	
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Add Individual Association from a Firm Producer Record

Follow this process to add an individual association to a firm's producer record.

1. Click the **Individual Associations** quick link.

Review/Update Firm

[Search Producer](#)

DEAN AND DAVIS INSURANCE AGENCY ★ ★ ★ ★ ★

EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
00-6233077		DEFAULT	2000000019	GA / 70443	AL / 416295

This producer has 3 active service requests in Producer Express: 10300967, 10296338, 10296275

Expand All

<ul style="list-style-type: none"> Firm Details Producer Business Rules Resident States External Sys IDs Contact Information Address History Email Messages Licenses/Qualifications 	<ul style="list-style-type: none"> Appointments Agreements Individual Associations Costs Aliases Data Reconciliation State Producer Numbers FINRA Information 	<ul style="list-style-type: none"> Business Units Required Items License Applications Comments Transaction History Professional Liability Authorization Overrides Compensation Profile
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New PX Request
Verify Sales Authorization
Review Sircon Subscription

Section: Add Individual Firm Associations/Association States

2. Click **Add New Individual Association or State Association**.

Agreements
Top

Individual Associations
Top

[Add New Individual Association](#)

EIN	Individual	Begin Date	End Date
Add New Individual Association or State Association view individual Associations Terminate a State Association Correct Association Data			

3. Enter at least one of the search criteria to find the name of the individual.
4. Click **Search**.

Add Individual Firm Association / Association State

Firm
Search Producer

DEAN AND DAVIS INSURANCE AGENCY
★★★★★

EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
00-6233077		DEFAULT	2000000019	GA / 70443	AL / 416295

This producer has 3 active service requests in Producer Express: 10300967, 10296338, 10296275

Search Individual

Please enter at least one of the search criteria below:

Last	<input type="text" value="EASLEY"/>	First	<input type="text"/>	Middle	<input type="text"/>
SSN	<input type="text"/>	NPN	<input type="text"/>	License State	<input type="text"/>
License Number	<input type="text"/>	License State	<input type="text"/>	External System ID	<input type="text"/>
External System ID	<input type="text"/>	Primary External ID Only	<input type="checkbox"/>		

Records Per Page:

5. You will now see the *Add Individual Firm Association/Association State* page.
6. You will see the **Current Association States** that are shared between the individual and firm.
7. To add an association, enter the following details:
 - **Association State:** Select the name of a state in which to add an individual-to-firm affiliation. Both the firm and individual producer should be licensed and hold active and matching qualifications in the selected state.
 - **Association Type:** Select a relationship of the individual to the firm in a selected association state.
 - **Position:** Select an employment title of the individual with the firm in a selected association state.
 - **Begin Date:** Enter the date on which the individual's association with the firm became effective in a selected association state. Use the MMDDYYYY date format.
 - **State Registered:**
 - Click **Yes** if the individual-to-firm association is recorded with the department of insurance in the selected association state.

Section: Add Individual Firm Associations/Association States

- Click **No** if the individual-to-firm association is not recorded with the department of insurance in the selected association state (i.e., recorded only in your company's internal records).

8. Click **Save and Return** to submit the association.

Add Individual Firm Association / Association State

Firm

DEAN AND DAVIS INSURANCE AGENCY (5 stars)

[Search Producer](#)

EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
00-6233077		DEFAULT	2000000019	GA / 70443	AL / 416295

This producer has 3 active service requests in Producer Express: 10300967, 10296338, 10296275

Individual

EASLEY, CORA (5 stars)

[Search Producer](#)

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
2050	DEFAULT	1000000028	VA / 736178	AZ / 1000000005

Active Qualifications

State

Alabama

Arizona

Georgia

DEAN AND DAVIS INSURANCE AGENCY	EASLEY, CORA
Principal Agency - Casualty	No Active Qualification exists.
Principal Agency - Life	
Principal Agency - Property	
Pm Agy - Accident&Sickness	

Idaho

Current Association

Begin Date	End Date
05-30-2023	

Current Association States

State	Association Type	Position	Begin Date	End Date	State Registered
California	Agent	Other	10-23-2023		Yes
Virginia	Agent/Broker	Secretary - Treasurer	05-30-2023		No
Florida	Agent/Broker	Other	05-30-2023	05-31-2023	No
Ohio	Agent	Other	05-30-2023	05-30-2023	No

Association State Georgia ▼

Association Type Agent ▼

Position Other ▼

Begin Date 10-23-2023

State Registered Yes No

9. The association will now appear on the page.

Section: Add Individual Firm Associations/Association States

Current Association					
	Begin Date	End Date			
	05-30-2023				
Current Association States					
State	Association Type	Position	Begin Date	End Date	State Registered
California	Agent	Other	10-23-2023		Yes
Georgia	Agent	Other	10-23-2023		Yes
Virginia	Agent/Broker	Secretary - Treasurer	05-30-2023		No
Florida	Agent/Broker	Other	05-30-2023	05-31-2023	No
Ohio	Agent	Other	05-30-2023	05-30-2023	No

Terminate Associations

Use the *Terminate Individual Firm Association State* page to record the inactivation of one or multiple state associations (affiliations) between an individual producer and a firm.

Terminate State Associations from an Individual Record

Follow these steps to terminate state associations from an individual's record.

1. Click the **Firm Associations** quick link.

Review/Update Individual

[Search Producer](#)

EASLEY, CORA ★ ★ ★ ★ ★

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
2050	DEFAULT	1000000028	VA / 736178	AZ / 1000000005

Expand All

<ul style="list-style-type: none"> Individual Details Producer Business Rules Resident States External Sys IDs Contact Information Address History Email Messages Licenses/Qualifications Appointments 	<ul style="list-style-type: none"> Agreements Firm Associations Employment History Aliases Data Reconciliation State Producer Numbers Required Items Background Investigations Business Units 	<ul style="list-style-type: none"> Locations and Departments Costs Education Credentials Course Completions Third Party Certifications License Applications Comments Transaction History Professional Liability 	<ul style="list-style-type: none"> Securities Information Authorization Overrides Compensation Profile
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New PX Request
Verify Sales Authorization
Review Sircon Subscription

2. Click the **Expand** button (⊕) next to the firm. You can then see all the Association States that are linked to the producer.
3. Click **Terminate** next to the association you need to remove.

Agreements Top

Firm Associations Top

EIN	Firm	Begin Date	End Date	
00-6233077	DEAN AND DAVIS INSURANCE AGENCY	05-30-2023		Add New Firm Association
64-7646741	FAIRFIELD AGENCY	05-30-2023		

[Add New Association State](#)

State	Association Type	Position	Begin Date	End Date	State Registered	
Virginia	Employee	Other	05-30-2023		Yes	Terminate

[Correct Association Data](#)

4. You will be directed to the *Terminate Individual Firm Association State* page.
5. You can choose to terminate all the association states with the firm, or you can select the state(s) you want to terminate.
6. Click **Save**.

Section: Terminate Associations

Current Association						
	Begin Date	End Date				
	05-30-2023					

Select association states to terminate:

All association states
 Selected Current Association States (select below)

Current Association States

State	Association Type	Position	Begin Date	End Date	State Registered
<input checked="" type="checkbox"/> Virginia	Employee	Other	05-30-2023		Yes

End Date

- The page will update, and you will no longer see the association in the **Current Association** section.

Current Association						
	Begin Date	End Date				
No Association exists.						

End Date

Terminate State Associations from a Firm's Producer Record

Follow these steps to terminate sales authorizations from a firm association record by searching for an individual producer.

- Click the **Individual Associations** quick link.

Review/Update Firm

DEAN AND DAVIS INSURANCE AGENCY Search Producer

EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
00-6233077		<input checked="" type="checkbox"/> DEFAULT	2000000019	GA / 70443	<input checked="" type="checkbox"/> AL / 416295

This producer has 3 active service requests in Producer Express: 10300967, 10296338, 10296275

Expand All

<ul style="list-style-type: none"> Firm Details Producer Business Rules Resident States External Sys IDs Contact Information Address History Email Messages Licenses/Qualifications 	<ul style="list-style-type: none"> Appointments Agreements Individual Associations Costs Aliases Data Reconciliation State Producer Numbers FINRA Information 	<ul style="list-style-type: none"> Business Units Required Items License Applications Comments Transaction History Professional Liability Authorization Overrides Compensation Profile
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Section: Terminate Associations

2. Click **Terminate a State Association**.

Agreements Top

Individual Associations Top

EIN	Individual	Begin Date	End Date
Add New Individual Association or State Association View Individual Associations Terminate a State Association Correct Association Data			

3. Enter at least one of the search criteria to locate the individual producer.
4. Click **Search**.

Terminate Individual Firm Association State

Firm Search Producer

DEAN AND DAVIS INSURANCE AGENCY ★★★★★

EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
00-6233077		DEFAULT	200000019	GA / 70443	AL / 416295

This producer has 3 active service requests in Producer Express: 10300967, 10296338, 10296275

Search Individual

Please enter at least one of the search criteria below:

Last <input type="text" value="EASLEY"/>	First <input type="text"/>	Middle <input type="text"/>
SSN <input type="text"/>	NPN <input type="text"/>	<input type="text"/>
License Number <input type="text"/>	License State <input type="text"/>	<input type="text"/>
External System ID <input type="text"/>	Primary External ID Only <input type="checkbox"/>	

Records Per Page:

5. You will be directed to the *Terminate Individual Firm Association State* page.
6. You can choose to terminate all the association states with the firm, or you can select the state(s) you want to terminate.
7. Click **Save**.

Current Association

Begin Date	End Date
05-30-2023	

Select association states to terminate:

All association states
 Selected Current Association States (select below)

Current Association States

State	Association Type	Position	Begin Date	End Date	State Registered
<input type="checkbox"/> California	Agent	Other	10-23-2023		Yes
<input type="checkbox"/> Georgia	Agent	Other	10-23-2023		Yes
<input checked="" type="checkbox"/> Virginia	Broker	Secretary - Treasurer	05-30-2023		Yes

End Date

Section: Terminate Associations

- The page will update, and you will no longer see the association in the **Current Association** section.

Current Association

Begin Date	End Date
10-23-2023	

Select association states to terminate:

All association states
 Selected Current Association States (select below)

Current Association States

State	Association Type	Position	Begin Date	End Date	State Registered
<input type="checkbox"/>	California	Agent	Other	10-23-2023	Yes
<input type="checkbox"/>	Georgia	Agent	Other	10-23-2023	Yes

End Date

Correct State Association Data

Use the *Correct State Association Data* page to correct individual-to-firm association information in a selected state. You can access the page from an individual's producer record or from a firm's producer record.

1. Click the **Individual Associations** quick link.

Review/Update Firm

DEAN AND DAVIS INSURANCE AGENCY
Search Producer

EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
00-6233077		DEFAULT	2000000019	GA / 70443	AL / 416295

This producer has 3 active service requests in Producer Express: 10300967, 10296338, 10296275

Expand All

<ul style="list-style-type: none"> Firm Details Producer Business Rules Resident States External Sys IDs Contact Information Address History Email Messages Licenses/Qualifications 	<ul style="list-style-type: none"> Appointments Agreements <li style="border: 2px solid cyan; padding: 2px;">Individual Associations Costs Aliases Data Reconciliation State Producer Numbers FINRA Information 	<ul style="list-style-type: none"> Business Units Required Items License Applications Comments Transaction History Professional Liability Authorization Overrides Compensation Profile
---	---	---

2. Click **Correct Association Data**.

Individual Associations Top

EIN	Individual	Begin Date	End Date
<div style="display: flex; justify-content: space-between; align-items: center;"> Add New Individual Association or State Association Add New Individual Association </div> <div style="display: flex; justify-content: center; align-items: center; gap: 10px;"> View Individual Associations Terminate a State Association Correct Association Data </div>			

3. Enter at least one of the search criteria to locate the producer.
4. Click **Search**.

Correct State Association Data

Firm
Search Producer

DEAN AND DAVIS INSURANCE AGENCY

EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
00-6233077		DEFAULT	2000000019	GA / 70443	AL / 416295

This producer has 3 active service requests in Producer Express: 10300967, 10296338, 10296275

Search Individual

Please enter at least one of the search criteria below:

Last	<input type="text" value="EASLEY"/>	First	<input type="text"/>
		Middle	<input type="text"/>
SSN	<input type="text"/>	NPN	<input type="text"/>
License Number	<input type="text"/>	License State	<input type="text"/>
External System ID	<input type="text"/>	Primary External ID Only	<input type="checkbox"/>

Records Per Page:
Search
Cancel

Section: Correct State Association Data

Note: If you are correcting the state data from the individual producer's record, you will need to search for the name of the firm.

5. Select the state association details you want to correct by clicking the checkbox next to the state.
6. At the bottom of the page, correct the data in any of the following fields:
 - **Association Type**
 - **Position**
 - **Begin Date**
 - **End Date**
 - **State Registered**
7. Click **Save**.

Correct State Association Data

Firm

 **DEAN AND DAVIS INSURANCE AGENCY** Search Producer

EIN	External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
00-6233077		DEFAULT	2000000019	GA / 70443	AL / 416295

 This producer has 3 active service requests in Producer Express: [10300967](#), [10296338](#), [10296275](#)

Individual

 **EASLEY, CORA** Search Producer

External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
2050	DEFAULT	1000000028	VA / 736178	AZ / 1000000005

Current Association

Begin Date	End Date
05-30-2023	

Select the State Association(s) to correct:

Association States					
State	Association Type	Position	Begin Date	End Date	State Registered
<input type="checkbox"/> California	Agent	Other	10-23-2023		Yes
<input type="checkbox"/> Georgia	Agent	Other	10-23-2023		Yes
<input checked="" type="checkbox"/> Virginia	Agent/Broker	Secretary - Treasurer	05-30-2023		No
<input type="checkbox"/> Florida	Agent/Broker	Other	05-30-2023	05-31-2023	No
<input type="checkbox"/> Ohio	Agent	Other	05-30-2023	05-30-2023	No

Association Type

Position

Begin Date

End Date

State Registered Yes No

Section: Correct State Association Data

8. The information will be updated on the page and in the producer record.

Current Association

	Begin Date	End Date
	05-30-2023	

Select the State Association(s) to correct:

Association States

	State	Association Type	Position	Begin Date	End Date	State Registered
<input type="checkbox"/>	California	Agent	Other	10-23-2023		Yes
<input type="checkbox"/>	Georgia	Agent	Other	10-23-2023		Yes
<input type="checkbox"/>	Virginia	Broker	Secretary - Treasurer	05-30-2023		Yes
<input type="checkbox"/>	Florida	Agent/Broker	Other	05-30-2023	05-31-2023	No
<input type="checkbox"/>	Ohio	Agent	Other	05-30-2023	05-30-2023	No

Association Type

Position

Begin Date

End Date

State Registered Yes No

APPENDIX 1: Sircon for Carriers Help Resources

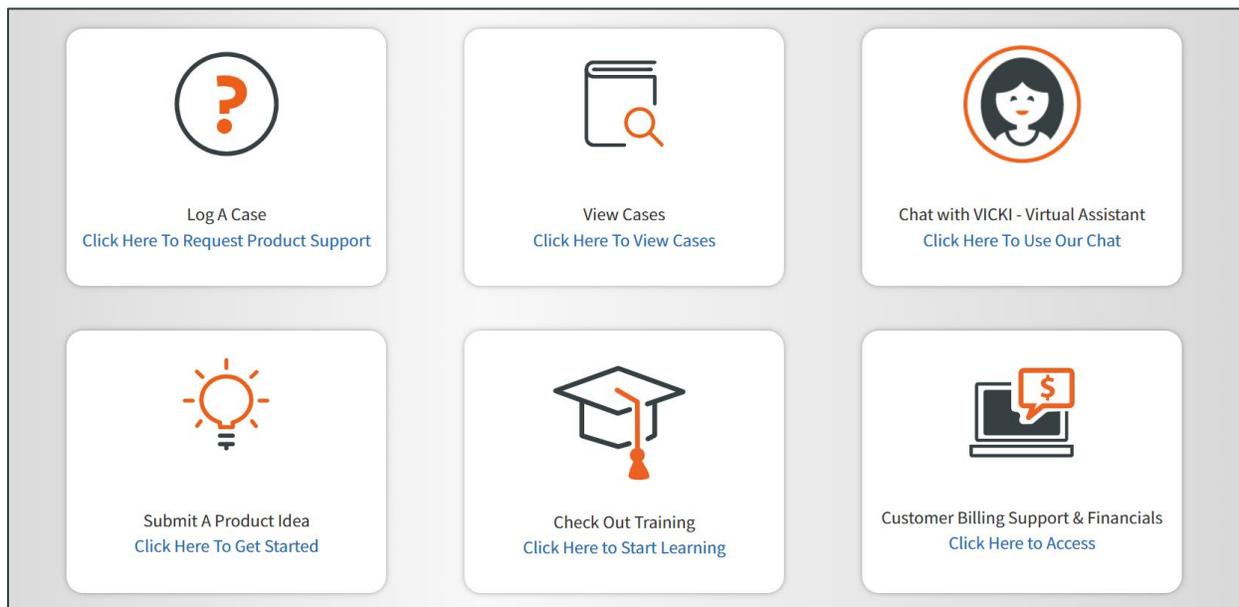
Help is just a click away. Vertafore has two resources available to support you 24/7:

- My Vertafore
- Sircon Support

My Vertafore

My Vertafore is our free online customer support portal and knowledge base. At [My Vertafore](#) you can:

- **Log a Case** – Cases are used to request product support
- **Submit Ideas** – Send Vertafore ideas for new product features or enhancements
- **Search Knowledgebase** – Search for detailed articles on the Sircon Knowledge Base



Note: Sircon does not use the Submit a Product Idea or Chat with VICKI functions.

Contact Vertafore Customer Support

Can't find what you are looking for at My Vertafore? Our Customer Support team is here to help. [Click here to email Support](#) or call 877-876-4430.

APPENDIX 2: Document History

Version	Revision Date	Revision Record
1.0	10/19/2023	Original Document



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

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