Producer Manager Outbound Data Feed
File Layout and Data Definitions Guide

A Guide to Integration
with the
Producer Manager
Outbound Data Feed

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Contents

Introduction

> **Note**: This document is a detailed and technical description of the Producer Manager Outbound Data Feed (OBDF). It is intended for Vertafore Sircon customers' IT staff, to assist in the integration of the Sircon Platform with customers' internal systems through data exported in the OBDF. For a higher-level, business-oriented overview of the OBDF, including data security, file examples, and integration implementation project information, please refer to the separate "Producer Manager Outbound Data Feed Getting Started Guide."

Producer Manager, a component of the cloud-based Sircon Platform, is a rules and data repository application that helps customers manage insurance producer credentials and distribution networks, submit state compliance transaction requests, and keep regulatory information in sync with trusted data sources.

Most Sircon Platform customers have numerous systems, including ERP, CRM, new business, policy application, or payroll/commissioning systems, that require access to the producer data stored in Producer Manager. To accommodate this business need, Producer Manager offers a file transfer integration capability: the Outbound Data Feed (OBDF).

Triggered by a database job that runs with a frequency configured to a customer's preference up to once per hour, the OBDF generates an XML export file that contains changes to the customer's producer data since the last run of the job. The file is encrypted and transferred to a secure, customer-specific FTP directory, where it may be retrieved by the customer's automated process. A customer-developed client application then can decrypt the file, parse the data, and feed the data to the customer's internal systems, as needed.

About This Document

The purpose of this document is to provide a taxonomy of the Outbound Data Feed XML export file and a business definition of each included data section (or "node") and element. Each exported element is listed and defined using clear, user-understandable text. Critical data characteristics also are included, including data type, maximum character length, and whether data is system-required and therefore always included when its containing node is exported. Special call-out paragraphs note where the file or underlying data have unique or unusual behaviors or offer tips for working with the data or file.

To help implementation project teams understand relationships among data, each element is mapped to its visible or modifiable location in the Producer Manager graphical user interface. If you are viewing this guide online, many field names include hyperlinks for navigating directly to an online help topic that provides further information about the data and their contexts within the application. Otherwise, you may input a field name or other search expression in the Search box in the Producer Manager online help and locate related help topics.

As further aid to internal project teams, such as in troubleshooting errors, elements are mapped to their native data sources in the Producer Manager database. Database relationships are represented as follows: [*TableName*].[*FieldName*] [(*CodeDomainLookup*)].

Producers

The Producers element is the root element in an OBDF export file. It contains the specific data for the two top-level sections or "nodes" of an OBDF export file: individual licensee producer data and firm (agency) producer data.

The Producers element has the following attributes:

- FirmCount

- IndividualCount

Attribute	Data Type	Max Length	Required?	Definition
FirmCount	NUMBER	5	No	The number of firm records included in the OBDF export file.
IndividualCount	NUMBER	5	No	The number of individual records included in the OBDF export file.

The Producers element contains the following child elements:

- Individuals

- Firms

Note: The order in which records appear in an OBDF export file, either Individuals then Firms or vice versa, may be Vertafore-configured based on a customer's preference through the XML_DFEED_ORDER business rule. For more information, see Configuration Options in the Producer Manager online help.

Individuals

The **Individuals** element contains all exported data for all individual licensee producers included in the OBDF export file.

If information pertaining to individual producers is triggered to be included in the export, each separate instance of the Individual child element may contain data from each included individual producer record.

Individual

The Individual element contains data pertaining to a single individual producer. It is a child element of the Individuals parent element.

The Individual element has the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the individual producer record in Producer Manager. Field reference: • Producer Manager: **Indv ID** field in the Details section of individual producer record • Database: INDV.INDV_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the individual producer record to be included in the OBDF export. Valid values: • Insert • Update • Delete • None

Attribute	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: None • Database: ACTN_CD

Each instance of the Individual element contains specific data content exported by the OBDF from an individual producer's record in Producer Manager. This content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- SSN
- PreviousSSN
- PreviousFeedSSN
- NationalProducerID
- Status
- CaptiveIndicator
- LastName
- FirstName
- SuffixName
- MiddleName
- EmailAddress
- WebAddress
- Gender
- Height
- Weight

- BirthDate

- BirthState

- BirthProvince

- BirthCountry

- DeceasedDate

- BankAccountNumber

- BankRouteNumber

- BankName

- BankAffiliatedIndicator

- EffectiveDate

- TerminationDate

- LicenseeIndicator

- LastSyncDate

- BankAccountType

- BankInstitutionType

- BankCity

- BankState

- BankAccountOwnerName

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- [CourseRequirements](#)
- [StateProducerNumbers](#)
- [Transactions](#)
- [ProfessionalLiabilityPolicies](#)
- [SecuritiesInformation](#)
- [AuthorizationOverrides](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the resident state information to the producer record. Field reference: • Producer Manager: None • Database: INDV.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the resident state information was added to the producer record. Field reference: • Producer Manager: None • Database: INDV.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the resident state information on the producer record. Field reference: • Producer Manager: None • Database: INDV.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the resident state information on the producer record was last modified. Field reference: • Producer Manager: None • Database: INDV.ROW_TMSP
SSN	NUMBER	11	No	The individual producer's Social Security Number. **Note**: The **SSN** element can be globally omitted

Element	Data Type	Max Length	Required?	Definition
				altogether from individual producer data exported through the OBDF, if the XML_EXPORT_INCL_SSN business rule is Vertafore-configured to "N (No)". For more information, please see Configuration Options in the Producer Manager online help or consult your Vertafore representative. **Note**: If the **SSN** field of the **Details** section of a producer record that is exported through the OBDF lacks a value, but the XML_EXPORT_INCL_SSN business rule is Vertafore-configured to "Y (Yes)", the **SSN** element will be included in the export file but with a null or blank value. Field reference: • Producer Manager: The **SSN** field in the Details section of the individual producer record • Database: INDV.SSN
PreviousSSN	NUMBER	11	No	The individual producer's previous Social Security Number. Used only when an **SSN** is changed or removed. **Note**: The **PreviousSSN** element can be globally omitted altogether from individual producer data exported through the OBDF, if the XML_EXPORT_INCL_SSN business rule is Vertafore-configured to "N (No)". For more information, please see Configuration Options in the Producer Manager Field reference:

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Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: None • Database: INDV.PREV_SSN
PreviousFeedSSN	NUMBER	11	Yes	The Social Security Number that was in the last previous export file containing the identical individual producer record. **Note**: The **PreviousFeedSSN** element can be globally omitted from individual producer data exported through the OBDF, using the XML_EXPORT_INCL_SSN business rule. For more information, please see Configuration Options in the Producer Manager online help or consult your Vertafore representative. Field reference: • Producer Manager: None • Database: INDV.PREV_FEED_SSN
NationalProducerID	NUMBER	20	No	The individual producer's National Producer Number (NPN). Field reference: • Producer Manager: The **NPN** field in the Details section of the individual producer record • Database: INDV.NATL_PRDCR_ID **Note**: If your company's configuration of Producer Manager requires a value in the **NPN** field, the system may also be Vertafore-configured to automatically create a "NPN Missing" code to appear in the RequiredItems node of a producer record that lacks an **NPN** value

Element	Data Type	Max Length	Required?	Definition
				(using the INDV_NPN_RQD_ITEM_IND business rule). You can remove the required item automatically by entering a valid NPN on the producer's record through the Producer Manager user interface. For more information, see Configuration Options in the Producer Manager online help.
Status	VARCHAR2	10	No	The status of the individual producer's record in Producer Manager, based on certain carrier or firm relationship conditions. Valid values: • AC: Active • IN: Inactive • PN: Pending The Producer Manager record status code is expressed in the **Code** attribute. The element value is the record status description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Status** field in the Details section of the individual producer record • Database: INDV.IL_STS_CD

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Element	Data Type	Max Length	Required?	Definition
				Note: The value of the **Status** field and passed in the OBDF export file is derived and cannot be set or updated directly by a user. **Note**: The **Status** element accommodates the following values: Pending, Active, or Inactive. If the producer record never has had an active appointment or firm association since the record was loaded into the system, the producer's record status is Pending. If the producer's record contains at least one active or active-pending state approval appointment or active firm association, the producer's record status is Active. If the producer's record contains only inactive appointments or firm associations, the producer's record status is Inactive. For more information, see Terminate Appointments and Terminate Associations in the Producer Manager online help.
CaptiveIndicator	VARCHAR2	1	No	Indicates whether the individual producer is part of a captive, employee, or in-house sales channel with your company. Field reference: • Producer Manager: The **Captive** field in the Details section of the individual producer record • Database: INDV.CPTV_IND
LastName	VARCHAR2	35	Yes	The individual producer's last name as recorded in Producer Manager. Field reference: • Producer Manager: The **Last** field in the Details

Element	Data Type	Max Length	Required?	Definition
				section of the individual producer record • Database: INDV.LNAME
FirstName	VARCHAR2	25	Yes	The individual producer's first name as recorded in Producer Manager. Field reference: • Producer Manager: The **First** field in the Details section of the individual producer record • Database: INDV.FNAME
SuffixName	VARCHAR2	3	No	The individual producer's name suffix as recorded in Producer Manager. Field reference: • Producer Manager: The **Suffix** field in the Details section of the individual producer record • Database: INDV.SUF_NAME
MiddleName	VARCHAR2	25	No	The individual producer's middle name as recorded in Producer Manager. Field reference: • Producer Manager: The **Middle** field in the Details section of the individual producer record • Database: INDV.MNAME
EmailAddress	VARCHAR2	72	No	The individual producer's email address. **Note**: Email address information for a firm producer is

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Element	Data Type	Max Length	Required?	Definition
				contained in the AddressesContacts node.
				Field reference:
				• Producer Manager: The **Email Address** field in the Contact Information section of the individual producer record
				• Database: INDV.EMAIL_ADDR
WebAddress	VARCHAR2	72	No	The individual producer's website address.
				Field reference:
				• Producer Manager: None
				• Database: INDV.INET_ADDR
				Note: It is not possible to record a website address for an individual producer through the Producer Manager user interface. The nillable attribute of the **WebAddress** element allows it to be flagged as being null.
Gender	VARCHAR2	10	No	The individual producer's gender.
				Field reference:
				• Producer Manager: The **Gender** field in the Details section of the individual producer record
				• Database: INDV.GNDR_CD
Height	NUMBER	10	No	The individual producer's height in inches.
				Field reference:
				• Producer Manager: The **Height** field in the

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Element	Data Type	Max Length	Required?	Definition
				Details section of the individual producer record • Database: INDV.HGT_INCH_QTY
Weight	NUMBER	10	No	The individual producer's weight in pounds. Field reference: • Producer Manager: The **Weight** field in the Details section of the individual producer record • Database: INDV.WGT_LBS_QTY
BirthDate	DATE	10	No	The individual producer's birth date. Field reference: • Producer Manager: The **Birth Date** field in the Details section of the individual producer record • Database: INDV.BRTH_DTE **Note**: Birth date can be Vertafore-configured to be required, based on your company's business requirements. If an individual producer record lacks a birth date, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.

Element	Data Type	Max Length	Required?	Definition
BirthState	VARCHAR2	10	No	The American state in which the individual producer was born. Content is restricted to a set of enumerated values in the StateCodeEnumType element. Field reference: • Producer Manager: The **Birth State** field in the Details section of the individual producer record • Database: INDV.BRTH_ST_CD
BirthProvince	VARCHAR2	10	No	The Canadian province in which the individual producer was born. Field reference: • Producer Manager: The **Birth Province** field in the Details section of the individual producer record • Database: INDV.BRTH_PROV_CD (PROV_CD).
BirthCountry	VARCHAR2	10	No	The country in which the individual producer was born. Field reference: • Producer Manager: The **Birth Country** field in the Details section of the individual producer record • Database: INDV.BRTH_CNTRY_CD (CNTRY_CD)
DeceasedDate	DATE	10	No	The date on which the individual producer died. Field reference: • Producer Manager: The **Deceased Date** field in the Details section of the individual producer

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Element	Data Type	Max Length	Required?	Definition
				record
				• Database: INDV.DECD_DTE
BankAccountNumber	VARCHAR2	20	No	The bank account number associated with the individual producer's electronic funds transfer (EFT) information. Field reference: • Producer Manager: The **Account Number** field in the Details section of the individual producer record • Database: INDV.BNK_ACCT_NBR
BankRouteNumber	NUMBER	9	No	The bank routing number associated with the individual producer's electronic funds transfer (EFT) information. Field reference: • Producer Manager: The **Routing Number** field in the Details section of the individual producer record • Database: INDV.BNK_ROUTE_NBR
BankName	VARCHAR2	35	No	The bank name associated with the individual producer's electronic funds transfer (EFT) information. Field reference: • Producer Manager: The **Name** field in the EFT Information sub-section of the Details section of the individual producer record • Database: INDV.BNK_NAME
BankAffiliatedIndicator	VARCHAR2	1	Yes	Indicates whether the individual producer is affiliated with a financial institution. Valid values:

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Element	Data Type	Max Length	Required?	Definition
				• Y: Yes • N: No Field reference: • Producer Manager: The **Bank Affiliated** field of the Details section of the individual producer record • Database: INDV.BNK_AFFL_IND
EffectiveDate	DATE	10	No	The date on which the value of the **Status** element for this individual producer record last was updated. Field reference: • Producer Manager: The **Effective Date** field of the Details section of the individual producer record • Database: INDV.IL_EFF_DTE
TerminationDate	DATE	10	No	The date on which the individual producer's last appointment with an appointing company became inactive. For a carrier customer, this would be the date on which the producer's last appointment with one of your carrier's group's appointing companies became inactive. For an agency/brokerage customer, this would be the date on which the producer's last appointment with any of the appointing companies with which your firm does business became inactive. Field reference: • Producer Manager: The **Termination Date** field of the Details section of the individual producer record

Element	Data Type	Max Length	Required?	Definition
				• Database: INDV.IL_TRMN_DTE
LicenseeIndicator	VARCHAR2	1	Yes	*Deprecated in Producer Manager.* Indicates whether the individual producer is a licensed or non-licensed, miscellaneous entity. Valid values: • Y: Yes • N: No **Note**: Value will always be "Y." Field reference: • Producer Manager: The **Licensee** field of the Details section of the individual producer record • Database: INDV.IL_IND
LastSyncDate	DATE	10	No	The date on which the individual producer record was most recently subject to an automated data reconciliation operation. Field reference: • Producer Manager: The **Last Sync Date** field of the Details section of the individual producer record • Database: INDV.LAST_SYNC_DTE **Note**: For more information about automated data reconciliation, please see the Producer Manager online

Element	Data Type	Max Length	Required?	Definition
				help. **Note**: Unless configured not to do so, the OBDF export job will run even if the only change to a producer record is an updated **LastSyncDate**. The service can be Vertafore-configured based on your company's preferences using the outbound.include.upToDate.producers business rule. For more information, see Configuration Options in the Producer Manager online help or consult your Vertafore representative.
BankAccountType	VARCHAR2	10	No	The individual producer's bank account type associated with electronic funds transfer (EFT). Field reference: • Producer Manager: The **Bank Account Type** field of the Details section of the individual producer record • Database: INDV.BNK_ACCT_TYPE_CD
BankInstitutionType	VARCHAR2	10	No	The individual producer's bank institution type associated with electronic funds transfer (EFT). Field reference: • Producer Manager: The **Institution Type** field of the Details section of the individual producer record • Database: INDV.BNK_INST_TYPE_CD
BankCity	VARCHAR2	25	No	The individual producer's bank city associated with electronic funds transfer (EFT).

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **City** field of the Details section of the individual producer record • Database: INDV.BNK_CITY
BankState	VARCHAR2	10	No	The individual producer's bank state associated with electronic funds transfer (EFT). Content is restricted to a set of enumerated values in the StateCodeEnumType element. Field reference: • Producer Manager: The **State** field of the Details section of the individual producer record • Database: INDV.BNK_ST_CD
BankAccountOwnerName	VARCHAR2	255	No	The name that is on the individual producer's bank account associated with electronic funds transfer (EFT). Field reference: • Producer Manager: The **Account Owner** field of the Details section of the individual producer record • Database: INDV.BNK_ACCT_OWNER_NAME
BankEmailAddress	VARCHAR2	255	No	The customer support email address at the selected individual producer's bank associated with electronic funds transfer (EFT). Field reference: • Producer Manager: The **EFT Contact Email Address** field of the Details section of the individual producer record

Element	Data Type	Max Length	Required?	Definition
				• Database: INDV.BNK_EMAIL_ADDR
ValidationDate	DATE	10	No	The date on which the value of the **ValidationStatus** element for this individual producer record last was updated. Field reference: • Producer Manager: None • Database: INDV.LAST_VLDTD_DTE
ValidationStatus	VARCHAR2	10	No	The status of the completeness of the individual producer's record in Producer Manager, based on your company's configured business rules. Valid values: • INCMPLT: Producer record is missing required information • VALID: Producer record contains all required information Field reference: • Producer Manager: None • Database: INDV.VLDTN_STS_CD **Note**: Depending on your company's configuration of Producer Manager, if valid values for certain data types are not included on a producer record, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help or

Element	Data Type	Max Length	Required?	Definition
				consult your Vertafore representative. **Note**: You can choose to exclude "incomplete" producer records from export through the OBDF. A Vertafore-configured business rule (XML_EXPORT_INCL_INCMPLT_PRDCRS) determines whether the records of producers with a validation status of INCMPLT will be included. For more information, see Configuration Options in the Producer Manager online help or consult your Vertafore representative.
Addresses				The individual producer's address information for all recorded address types. Refers to specific content in the Addresses element. Field reference: • Producer Manager: Contact Information **Note**: Any address type can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks a required address type, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.

Element	Data Type	Max Length	Required?	Definition
				Note: In an OBDF export file, for all address types except residential address, the first line (**Line One**) of an individual producer's address information can be Vertafore-configured to contain the firm name with which the producer is associated. This setting is accomplished using the ADDR_USE_PARENT_FIRM_LINE_ONE business rule. For more information, see Firm Associations and Configuration Options in the Producer Manager online help.
TelephoneNumbers				The individual producer's telephone information for all recorded phone types. Refers to specific content in the TelephoneNumbers element. Field reference: • Producer Manager: Contact Information **Note**: Any phone type can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks a required phone type, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.

Element	Data Type	Max Length	Required?	Definition
Aliases				The individual producer's alternate identity information for all recorded alias types. Refers to specific content in the <u>Aliases</u> element. Field reference: • Producer Manager: Aliases
Interfaces				The information used by your company's other systems to identify the individual producer. Refers to specific content in the <u>Interfaces</u> element. Field reference: • Producer Manager: External System IDs **Note**: External system identifiers can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks a required external sytem identifier, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.
ResidentStates				The individual producer's residence states information. Refers to specific content in the <u>ResidentStates</u> element.

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Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: Resident States **Note**: Resident state information can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks required resident state information, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.
FirmAssociations				The individual producer's firm associations information. Refers to specific content in the FirmAssociations element. Field reference: • Producer Manager: Resident States **Note**: A firm association can be Vertafore-configured to be required, based on your company's business requirements. If an individual producer record lacks a required firm association, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests

Element	Data Type	Max Length	Required?	Definition
				may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.
Restrictions				*Deprecated.* The individual producer's license restriction information is deprecated functionality in Producer Manager. The **Restrictions** child element of the Individual parent element will always be empty in an OBDF export file.
BackgroundInvestigations				Information about the individual producer's background investigations. Refers to specific content in the BackgroundInvestigations element. Field reference: • Producer Manager: Background Investigations
RequiredItems				The individual producer's required items information. Refers to specific content in the RequiredItems element. Field reference: • Producer Manager: Required Items
Bonds				*Deprecated.* The individual producer's bond information is deprecated functionality in Producer Manager.

Element	Data Type	Max Length	Required?	Definition
				The **Bonds** child element of the Individual parent element will always be empty in an OBDF export file.
NASDJurisdictionStates				Information about the individual producer's state securities registration as regulated by FINRA.
				Refers to specific content in the NASDJurisdictionStates element.
				Field reference:
				• Producer Manager: FINRA Information
NASDSeriesList				Information about the individual producer's securities registration series as regulated by FINRA.
				Refers to specific content in the NASDSeriesList element.
				Field reference:
				• Producer Manager: FINRA Information
EmploymentHistory				The individual producer's employment history information.
				Refers to specific content in the EmploymentHistory element.
				Field reference:
				• Producer Manager: Employment History
Educations				The individual producer's education information (e.g., secondary, post-secondary, etc.).
				Refers to specific content in the Educations element.
				Field reference:
				• Producer Manager: Education/Professional

Element	Data Type	Max Length	Required?	Definition
				Designation
				Note: The **Educations** element does not contain the producer's product-specific training or license continuing education information. This information is exported in the **Courses** and **CourseRequirements** elements.
ProfessionalDesignations				The individual producer's professional designation information. Refers to specific content in the ProfessionalDesignations element. Field reference: • Producer Manager: Education/Professional Designation
Licenses				Information about the individual producer's state insurance licenses. Refers to specific content in the Licenses element. Field reference: • Producer Manager: Licenses/Qualifications
Qualifications				Information about the individual producer's license lines or lines of authority. Refers to specific content in the Qualifications element. Field reference: • Producer Manager: Licenses/Qualifications
Appointments				Information about the individual producer's

Element	Data Type	Max Length	Required?	Definition
				appointments.
				Refers to specific content in the Appointments element.
				Field reference:
				• Producer Manager: Appointments
Agreements				The individual producer's residence states information.
				Refers to specific content in the ResidentStates element.
				Field reference:
				• Producer Manager: Resident States
				Note: Agreements can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks required agreement information, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.
Applications				Information about the individual producer's insurance license applications.
				Refers to specific content in the Applications element.
				Field reference:

Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: License Applications
LetterRequests				*Deprecated.* The individual producer's letter request information is deprecated functionality in Producer Manager. The **LetterRequests** child element of the Individual parent element will always be empty in an OBDF export file.
BusinessUnits				The individual producer's business unit information. Refers to specific content in the BusinessUnits element. Field reference: • Producer Manager: Business Units **Note**: Business units can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks required busines unit information, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.
ProductCertifications				The individual producer's product certification

Element	Data Type	Max Length	Required?	Definition
				information. Refers to specific content in the ProductCertifications element. Field reference: • Producer Manager: Product Certifications
Comments				Internal staff comment or note information maintained on the individual producer's record. Refers to specific content in the Comments element. Field reference: • Producer Manager: Comments
Courses				The individual producer's education or training course completions and credits. Refers to specific content in the Courses element. Field reference: • Producer Manager: Courses
CourseRequirements				**Note**: The **CourseRequirements** element does "double-duty" and can contain the producer's CE requirement data or education credential status information. The individual producer's education credential status or CE requirement information. Refers to specific content in the CourseRequirements element. Field reference:

Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: CE Requirements or Education Credentials
StateProducerNumbers				Information about the individual producer's unique state identifiers. Refers to specific content in the StateProducerNumbers element. Field reference: • Producer Manager: State Producer Numbers
Transactions				Information about individual Producer Express onboarding requests or maintenance transactions. Refers to specific content in the Transactions element. Field reference: • Producer Manager: Transaction History
ProfessionalLiabilityPolicies				The individual producer's professional liability policy information. Refers to specific content in the ProfessionalLiabilityPolicies element. Field reference: • Producer Manager: Professional Liability
SecuritiesInformation				The individual producer's securities registrations and exam information. Refers to specific content in the SecuritiesInformation element. Field reference: • Producer Manager: Securities Information

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Element	Data Type	Max Length	Required?	Definition
AuthorizationOverrides				Staff member overrides of the individual producer's sales authorization check results. Refers to specific content in the AuthorizationOverrides element. Field reference: • Producer Manager: Authorization Overrides

Firms

The **Firms** element contains all exported data for all firm or agency producers included in the OBDF export file.

If information pertaining to firm producers is triggered to be included in the export, each separate instance of the Firm child element may contain data from each included firm producer record.

Firm

The Firm element contains data pertaining to a single firm producer. It is a child element of the Firms parent element.

The Firm element has the following attributes:

• InternalID

• Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the firm producer record in Producer Manager. Field reference:

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Attribute	Data Type	Max Length	Required?	Definition
				• Producer Manager: The **Firm ID** field in the Details section of individual producer record • Database: ORG.ORG_ID or AGY.AGY_ORG_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the firm producer record to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Each instance of the Firm element contains specific data content exported by the OBDF from a firm producer's record in Producer Manager. This content is expressed in the following child elements:

• InsertUserID

• InsertDateTime

• UpdateUserID

• UpdateDateTime

• EIN

• PreviousEIN

• PreviousFeedEIN

• NationalProducerID

• Type

- [Status](#)

- [Name](#)

- [CaptiveIndicator](#)

- [DistributionChannel](#)

- [BankAccountNumber](#)

- [BankRouteNumber](#)

- [BankName](#)

- [BankAffiliatedIndicator](#)

- [EffectiveDate](#)

- [TerminationDate](#)

- [LastSyncDate](#)

- [BankAccountType](#)

- [BankInstitutionType](#)

- [BankCity](#)

- [BankState](#)

- [BankAccountOwnerName](#)

- [BankEmailAddress](#)

- [ValidationDate](#)

- [ValidationStatus](#)

- [AddressesContacts](#)

- [Aliases](#)

- [Bonds](#)

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- [Agreements](#)

- [Applications](#)

- [LetterRequests](#)

- [BusinessUnits](#)

- [Comments](#)

- [StateProducerNumbers](#)

- [Transactions](#)

- [ProductCertifications](#)

- [ProfessionalLiabilityPolicies](#)

- [AuthorizationOverrides](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the resident state information to the producer record. Field reference: • Producer Manager: None • Database:AGY.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the resident state information was added to the producer record.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: None • Database: AGY.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the resident state information on the producer record. Field reference: • Producer Manager: None • Database: AGY.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the resident state information on the producer record was last modified. Field reference: • Producer Manager: None • Database: AGY.ROW_TMSP
EIN	NUMBER	10	Yes	The firm producer's Federal Employer Identification Number. Field reference: • Producer Manager: The **EIN** field in the Details section of the firm producer record • Database: ORG.EIN
PreviousEIN	NUMBER	10	No	The firm producer's previous Federal Employer Identification Number. Used only when an EIN is changed. Field reference: • Producer Manager: None

Element	Data Type	Max Length	Required?	Definition
				• Database: ORG.PREV_EIN
PreviousFeedEIN	NUMBER	10	Yes	The Federal Employer Identification Number that was in the last previous export file containing the identical firm producer record. Field reference: • Producer Manager: None • Database: ORG.PREV_FEED_EIN
NationalProducerID	NUMBER	20	No	The firm producer's National Producer Number (NPN). Field reference: • Producer Manager: The **NPN** field in the Details section of the firm producer record • Database: ORG.NATL_PRDCR_ID **Note**: If your company's configuration of Vertafore PLM requires a value in the **NPN** field, the system may also be Vertafore-configured to automatically create a "NPN Missing" entry to appear in the Required Items node of a producer record that lacks an **NPN** value (using the INDV_NPN_RQD_ITEM_IND business rule). You can remove the required item automatically by entering a valid NPN. For more information, see Configuration Options in the Producer Manager online help.
Type	VARCHAR2	10	No	The legal organizational structure of the selected firm producer. Valid values are restricted to those that are configured in the AGY_TYPE_CD code domain on the Maintain Codes page.

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Element	Data Type	Max Length	Required?	Definition
				The Producer Manager firm type code is expressed in the **Code** attribute. The element value is the firm type description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Firm Type** field in the Details section of the firm producer record • Database: AGY.AGY_TYPE_CD (AGY_TYPE_CD)
Status	VARCHAR2	10	No	The status of the firm producer's record in Producer Manager, based on certain carrier relationship conditions or individual producer relationship conditions. Valid values: • AC: Active • IN: Inactive • PN: Pending The Producer Manager record status code is expressed in the **Code** attribute. The element value is the record status description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference:

Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: The **Status** field in the Details section of the firm producer record • Database: AGY.STS_CD **Note**: The value of the **Status** field and passed in the OBDF export file is derived and cannot be set or updated directly by a user. **Note**: The **Status** element accommodates the following values: Pending, Active, or Inactive. If the producer record never has had an active appointment or individual association since the record was loaded into the system, the producer's record status is Pending. If the producer's record contains at least one active or active-pending state approval appointment or active association with an individual producer, the firm producer's record status is Active. If the firm producer's record contains only inactive appointments or individual associations, the producer's record status is Inactive. For more information, see Terminate Appointments and Terminate Associations in the Producer Manager online help.
Name	VARCHAR2	155	Yes	The producer's firm name, as currently recorded on the producer's record in Producer Manager. Field reference: • Producer Manager: The **Name** field in the Details section of the firm producer record • Database: ORG.ORG_NAME
CaptiveIndicator	VARCHAR2	1	Yes	Indicates whether the firm producer is part of a captive or in-house sales channel with your company.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **Captive** field in the <u>Details</u> section of the firm producer record • Database: AGY.CPTV_IND
DistributionChannel	VARCHAR2	10	No	The sales or distribution channel to which the firm producer is assigned. Valid values are restricted to those that are configured in the DIST_CHNL_CD code domain on the Maintain Codes page. The Producer Manager distribution channel code is expressed in the **Code** attribute. The element value is the distribution channel description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Distribution Channel** field in the Details section of the firm producer record • Database: AGY.DIST_CHNL_CD
BankAccountNumber	VARCHAR2	20	No	The bank account number associated with the firm producer's electronic funds transfer (EFT) information. Field reference: • Producer Manager: The **Account Number** field in the Details section of the firm producer record • Database: AGY.BNK_ACCT_NBR

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Element	Data Type	Max Length	Required?	Definition
BankRouteNumber	NUMBER	9	No	The bank routing number associated with the firm producer's electronic funds transfer (EFT) information. Field reference: • Producer Manager: The **Routing Number** field in the Details section of the firm producer record • Database: AGY.BNK_ROUTE_NBR
BankName	VARCHAR2	35	No	The bank name associated with the firm producer's electronic funds transfer (EFT) information. Field reference: • Producer Manager: The **Name** field in the **EFT Information** sub-section of the Details section of the firm producer record • Database: AGY.BNK_NAME
BankAffiliatedIndicator	VARCHAR2	1	No	Indicates whether the firm producer is affiliated with a financial institution. Field reference: • Producer Manager: The **Bank Affiliated** field of the Details section of the firm producer record • Database: AGY.BNK_AFFL_IND
EffectiveDate	DATE	10	No	The date on which the value of the **Status** element for this firm producer record last was updated. Field reference: • Producer Manager: The **Effective Date** field of the Details section of the firm producer record • Database: AGY.EFF_DTE

Element	Data Type	Max Length	Required?	Definition
TerminationDate	DATE	10	No	The date on which the firm producer's last appointment with an appointing company became inactive. For a carrier customer, this would be the date on which the firm producer's last appointment with one of your carrier's group's appointing companies became inactive. For an agency/brokerage customer, this would be the date on which the firm producer's last appointment with any of the appointing companies with which your firm does business became inactive. Field reference: • Producer Manager: The **Termination Date** field of the Details section of the firm producer record • Database: AGY.TRMN_DTE
LastSyncDate	DATE	10	No	The date on which the firm producer record was most recently subject to an automated data reconciliation operation. Field reference: • Producer Manager: The **Last Sync Date** field of the Details section of the firm producer record • Database: AGY.LAST_SYNC_DTE **Note**: For more information about automated data reconciliation, please see the Producer Manager online help. **Note**: Unless configured not to do so, the OBDF export job will run even if the only change to a producer record is an updated **LastSyncDate**. The service can be Vertafore-configured based on your company's preferences using the outbound.include.upToDate.producers business rule. For more information, see Configuration Options in the Producer

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Element	Data Type	Max Length	Required?	Definition
BankAccountType	VARCHAR2	10	No	The firm producer's bank account type associated with electronic funds transfer (EFT). Field reference: • Producer Manager: The **Bank Account Type** field of the Details section of the firm producer record • Database: AGY.BNK_ACCT_TYPE_CD
BankInstitutionType	VARCHAR2	10	No	The firm producer's bank institution type associated with electronic funds transfer (EFT). Field reference: • Producer Manager: The **Institution Type** field of the Details section of the firm producer record • Database: AGY.BNK_INST_TYPE_CD
BankCity	VARCHAR2	25	No	The firm producer's bank city associated with electronic funds transfer (EFT). Field reference: • Producer Manager: The **City** field of the Details section of the firm producer record • Database: AGY.BNK_CITY
BankState	VARCHAR2	10	No	The firm producer's bank state associated with electronic funds transfer (EFT). Field reference: • Producer Manager: The **State** field of the Details section of the firm producer record

Element	Data Type	Max Length	Required?	Definition
				• Database: AGY.BNK_ST_CD
BankAccountOwnerName	VARCHAR2	255	No	The name that is on the firm producer's bank account associated with electronic funds transfer (EFT). Field reference: • Producer Manager: The **Account Owner** field of the Details section of the firm producer record • Database: AGY.BNK_ACCT_OWNER_NAME
BankEmailAddress	VARCHAR2	255	No	The customer support email address at the selected firm producer's bank associated with electronic funds transfer (EFT). Field reference: • Producer Manager: The **EFT Contact Email Address** field of the Details section of the firm producer record • Database: AGY.BNK_EMAIL_ADDR
ValidationDate	DATE	10	No	The date on which the value of the **ValidationStatus** element for this firm producer record last was updated. Field reference: • Producer Manager: None • Database: AGY.LAST_VLDTD_DTE
ValidationStatus	VARCHAR2	10	No	The status of the completeness of the firm producer's record in Producer Manager, based on your company's configured business rules. Valid values: • INCMPLT: Producer record is missing required information

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Element	Data Type	Max Length	Required?	Definition
				• VALID: Producer record contains all required information Field reference: • Producer Manager: None • Database: AGY.VLDTN_STS_CD **Note**: Depending on your company's configuration of Producer Manager, if valid values for certain data types are not included on a producer record, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help or consult your Vertafore representative. **Note**: You can choose to exclude "incomplete" producer records from export through the OBDF. A Vertafore-configured business rule (XML_EXPORT_INCL_INCMPLT_PRDCRS) determines whether the records of producers with a validation status of INCMPLT will be included. For more information, see Configuration Options in the Producer Manager online help or consult your Vertafore representative.
AddressesContacts				The firm producer's complete address, phone, contact, and email information for all recorded address types. Refers to specific content in the AddressesContacts element. Field reference:

Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: Contact Information **Note**: Any address or phone type can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks a required address or phone type, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.
Aliases				The firm producer's alternate identity information of all recorded alias types. Refers to specific content in the Aliases element. Field reference: • Producer Manager: Aliases
Bonds				*Deprecated.* The firm producer's bond information is deprecated functionality in Producer Manager. The **Bonds** child element of the Firm parent element will always be empty in an OBDF export file.
NASDJurisdictionStates				Information about the firm producer's state securities registrations as regulated by FINRA.

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Element	Data Type	Max Length	Required?	Definition
				Refers to specific content in the NASDJurisdictionStates element. Field reference: • Producer Manager: FINRA Information
Restrictions				*Deprecated*. The firm producer's license restriction information is deprecated functionality in Producer Manager. The **Bonds** child element of the Firm parent element will always be empty in an OBDF export file.
Interfaces				The information used by your company's other systems to identify the firm producer. Refers to specific content in the Interfaces element. Field reference: • Producer Manager: External System IDs **Note**: External system identifiers can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks a required external sytem identifier, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.

Element	Data Type	Max Length	Required?	Definition
ResidentStates				The firm producer's residence states information. Refers to specific content in the ResidentStates element. Field reference: • Producer Manager: Resident States **Note**: Resident state information can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks required resident state information, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.
IndividualAssociations				Information about the firm producer's active or inactive affiliations with individual producers. Refers to specific content in the IndividualAssociations element. Field reference: • Producer Manager: Individual Associations **Note**: An individual association can be Vertafore-configured to be required, based on your company's business requirements. If a firm producer record lacks a required

Element	Data Type	Max Length	Required?	Definition
				individual association, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.
RequiredItems				The firm producer's required items information. Refers to specific content in the RequiredItems element. Field reference: • Producer Manager: Required Items
RelatedFirms				*Deprecated.* Other branch locations or firms associated with the firm producer is deprecated functionality in Producer Manager. The **RelatedFirms** child element of the Firm parent element will always be empty in an OBDF export file.
ParentFirms				*Deprecated.* The firm producer's main location or parent firm is deprecated functionality in Producer Manager. The **ParentFirms** child element of the Firm parent element will always be empty in an OBDF export file.
Licenses				Information about the firm producer's state insurance licenses.

Element	Data Type	Max Length	Required?	Definition
				Refers to specific content in the Licenses element.
				Field reference:
				• Producer Manager: Licenses/Qualifications
Qualifications				Information about the firm producer's license lines or lines of authority.
				Refers to specific content in the Qualifications element.
				Field reference:
				• Producer Manager: Licenses/Qualifications
Appointments				Information about the firm producer's appointments.
				Refers to specific content in the Appointments element.
				Field reference:
				• Producer Manager: Appointments
Agreements				Information about the firm producer's business agreements or contracts with your company and its writing companies, held either exclusively or through a distribution network.
				Refers to specific content in the Agreements element.
				Field reference:
				• Producer Manager: Agreements
				Note: Agreements can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks required agreement information, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer

Element	Data Type	Max Length	Required?	Definition
				until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.
Applications				Information about the firm producer's insurance license applications. Refers to specific content in the Applications element. Field reference: • Producer Manager: License Applications
LetterRequests				*Deprecated*. The firm producer's letter request information is deprecated functionality in Producer Manager. The **LetterRequests** child element of the Firm parent element will always be empty in an OBDF export file.
BusinessUnits				The firm producer's business unit information. Refers to specific content in the BusinessUnits element. Field reference: • Producer Manager: Business Units **Note**: Business units can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks required busines unit information, the record may be considered to be deficient of required information. A producer record deficient of required

Element	Data Type	Max Length	Required?	Definition
				information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.
Comments				Internal staff comment or note information maintained on the firm producer's record. Refers to specific content in the Comments element. Field reference: • Producer Manager: Comments
StateProducerNumbers				Information about the firm producer's unique state identifiers. Refers to specific content in the StateProducerNumbers element. Field reference: • Producer Manager: State Producer Numbers
Transactions				Information about Producer Express onboarding requests or maintenance transactions that involve the firm producer. Refers to specific content in the Transactions element. Field reference: • Producer Manager: Transaction History
ProductCertifications				The firm producer's product certification information. Refers to specific content in the ProductCertifications

Element	Data Type	Max Length	Required?	Definition
				element.
				Field reference:
				• Producer Manager: Product Certifications
ProfessionalLiabilityPolicies				The firm producer's professional liability policy information.
				Refers to specific content in the ProfessionalLiabilityPolicies element.
				Field reference:
				• Producer Manager: Professional Liability
AuthorizationOverrides				Staff member overrides of the firm producer's sales authorization check results.
				Refers to specific content in the AuthorizationOverrides element.
				Field reference:
				• Producer Manager: Authorization Overrides

Nodes

Addresses

Address data for each individual producer included in an OBDF export is contained in the Addresses element.

Note: Firm producer address information is contained in a separate node in an OBDF export file, AddressesContacts.

Note: Email address information for an individual producer is contained in a child element of the Individual parent element.

Note: A Vertafore configuration option (CLEANUP_INDV_ADDR) can automatically apply maximum length limits to all fields in all individual address types, abbreviate them, include updated address information in an OBDF export file, and update Contact Information in producer records in Producer Manager with abbreviated address information. For more information, see Business_System_Integration.

Note: Any address type can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks a required address type, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.

If address data is triggered to be included in an export, each separate instance of the Address child element may contain contact information related to one of an individual producer's address types.

Address

The **Address** element contains data pertaining to a single address type associated with an individual producer.

The **Address** element contains the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the address in Producer Manager. Field reference: • Producer Manager: None • Database: INDV_ADDR.INDV_ADDR_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the address to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Address content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- Type
- LineOne
- LineTwo
- City

- [PostalCode](#)

- [State](#)

- [Country](#)

- [County](#)

- [Province](#)

- [BadAddressIndicator](#)

- [BUShortName](#)

- [LockIndicator](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the address to the individual producer record. Field reference: - Producer Manager: None - Database: INDV_ADDR.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the address was added to the individual producer record. Field reference: - Producer Manager: None - Database: INDV_ADDR.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the address information on the individual producer record. Field reference: - Producer Manager: None - Database: INDV_ADDR.ROW_UID

Element	Data Type	Max Length	Required?	Definition
UpdateDateTime	DATE	19	No	The date and time stamp on which the address information on the individual producer record was last modified. Field reference: • Producer Manager: None • Database: INDV_ADDR.ROW_TMSP
Type	VARCHAR2	10	Yes	The type of address. Valid values: • 01: Business Location • 02: Residential • 03: Mailing • 12: Billing The Producer Manager address type code is expressed in the **Code** attribute. The element value is the address type description. **Note**: Additional address types are user-configurable in the INDV_ADDR_TYPE_CD code domain on the Maintain Codes page in Producer Manager. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The *[AddressType]* field

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Element	Data Type	Max Length	Required?	Definition
				in the Contact Information data section of an individual producer record. • Database: INDV_ADDR.TYPE_CD (INDV_ADDR_TYPE_CD)
LineOne	VARCHAR2	40	Yes	The first address line of the address type. **Note**: For all address types except residential address (**Type**="02"), **LineOne** can be Vertafore-configured in the Outbound Data Feed to contain the firm name with which the producer is associated. This setting is accomplished using the ADDR_USE_PARENT_FIRM_LINE_ONE business rule. For more information, see Firm Associations and Configuration Options. Field reference: • Producer Manager: Unless configured specifically otherwise (see **Note** above), the **Line One** field associated with a specific address type in the Contact Information data section of an individual producer record. • Database: INDV_ADDR.LINE_ONE_ADDR
LineTwo	VARCHAR2	40	No	The second address line of the address type. Field reference: • Producer Manager: The **Line Two** field associated with a specific address type in the Contact Information data section of an individual producer record. • Database: INDV_ADDR.LINE_TWO_ADDR

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Element	Data Type	Max Length	Required?	Definition
City	VARCHAR2	25	Yes	The city of the address type. Field reference: • Producer Manager: The **City** field associated with a specific address type in the Contact Information data section of an individual producer record. • Database: INDV_ADDR.CITY_NAME
PostalCode	NUMBER	11	No	The postal or ZIP code of the address type. **Note**: **Postal Code** is required data in the Producer Manager user interface. All contact information in the OBDF export file will contain **PostalCode**, if **State** or **Province** is included. Field reference: • Producer Manager: The **Postal Code** field associated with a specific address type in the Contact Information data section of an individual producer record. • Database: INDV_ADDR.PSTL_CD
State	VARCHAR2	10	No	A code representing the state of the address type. Content is restricted to a set of enumerated values in the StateCodeEnumType element. **Note**: **State**, **Province**, or **Country** is required data in the Producer Manager user interface. All contact information in the OBDF export file will contain one or

Element	Data Type	Max Length	Required?	Definition
				the other.
				Field reference:
				• Producer Manager: The **State** field associated with a specific address type in the Contact Information data section of an individual producer record.
				• Database: INDV_ADDR.ST_CD
Country	VARCHAR2	10	No	A code representing the country of the address type.
				Content is restricted to a set of enumerated values that is user-configurable in the CNTRY_ADDR_CD code domain on the Maintain Codes page in Producer Manager.
				Note: **State**, **Province**, or **Country** is required data in the Producer Manager user interface. All contact information in the OBDF export file will contain one or the other.
				Field reference:
				• Producer Manager: The **Country** field associated with a specific address type in the Contact Information data section of an individual producer record.
				• Database: INDV_ADDR.CNTRY_CD (CNTRY_ADDR_CD)
County				The county of the address type is deprecated functionality in Producer Manager.

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Element	Data Type	Max Length	Required?	Definition
				The **County** child element of the <u>Addresses</u> parent element will always be empty in an OBDF export file.
Province	VARCHAR2	10	No	A code representing the province of the address type. **Note**: **State**, **Province**, or **Country** is required data in the Producer Manager user interface. All contact information in the OBDF export file will contain one or the other. Content is restricted to a set of enumerated values that is user-configurable in the PROV_CD code domain on the Maintain Codes page in Producer Manager. The Producer Manager province code is expressed in the **Code** attribute. The element value is the province description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Province** field associated with a specific address type in the Contact Information data section of an individual producer record. • Database: INDV_ADDR.PROV_CD (PROV_CD)

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Element	Data Type	Max Length	Required?	Definition
BadAddressIndicator	VARCHAR2	1	Yes	Indicates that a staff member has marked the address as invalid, and the correct address for the address type is unknown. Valid values: • Y: Information associated with the address type has been manually flagged by staff as invalid. • N: Information associated with the address type has not been flagged as invalid. Field reference: • Producer Manager: A 🚩 associated with a specific address type in the Contact Information data section of an individual producer record. • Database: INDV_ADDR.INVLD_CD
BUShortName	VARCHAR2	10	No	The short name code of the business unit associated with the address type. **Note**: For more information about business units, see BusinessUnits. Field reference: • Producer Manager: None • Database: BU.SHRT_NAME
LockIndicator	VARCHAR2	1	Yes	Indicates that the information associated with the address type has been manually set to be protected from automated updates by the United States Postal

Element	Data Type	Max Length	Required?	Definition
				Service National Change of Address feed.
				Field reference:
				• Producer Manager:A 🔒 associated with a specific address type in the Contact Information data section of an individual producer record.
				• Database: INDV_ADDR.LOCK_IND

AddressesContacts

Contact Information for each firm producer included in an OBDF export is contained in the AddressesContacts element.

Note: Individual producer address information is contained in a separate node in an OBDF export file, Addresses.

Note: A Vertafore configuration option (CLEANUP_AGY_ADDR) can automatically apply maximum length limits to all fields in all firm address types, abbreviate them, include updated address information in an OBDF export file, and update Contact Information in producer records in Producer Manager with abbreviated address information. For more information, see Business_System_Integration.

Note: Any address or phone type can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks a required address or phone type, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.

If address data is triggered to be included in an export, each separate instance of the AddressContact child element may contain contact information related to one of a firm producer's address types.

AddressContact

The **AddressContact** element contains data pertaining to a single address type associated with a firm producer.

The **AddressContact** element contains the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the contact information in Producer Manager. Field reference: • Producer Manager: None • Database: ORG_ADDR_CNTCT.ORG_ADDR_CNTCT_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the contact information to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

AddressContact content is expressed in the following child elements:

- InsertUserID
- InsertDateTime

- UpdateUserID

- UpdateDateTime

- Type

- LineOne

- LineTwo

- LineThree

- City

- PostalCode

- State

- Country

- County

- Province

- BadAddressIndicator

- LastName

- FirstName

- MiddleName

- PhoneNumber

- PhoneExtensionNumber

- FaxNumber

- TollPhoneNumber

- TollPhoneExtensionNumber

- Email

- BUShortName

- LockIndicator

Element	Data Type	Max Length	Required?	Definition

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the contact information to the firm producer record. Field reference: • Producer Manager: None • Database: ORG_ADDR_CNTCT.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the contact information was added to the firm producer record. Field reference: • Producer Manager: None • Database: ORG_ADDR_CNTCT.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the contact information on the firm producer record. Field reference: • Producer Manager: None • Database: ORG_ADDR_CNTCT.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the contact information on the firm producer record was last modified. Field reference: • Producer Manager: None • Database:ORG_ADDR_CNTCT.ROW_TMSP
Type	VARCHAR2	10	Yes	The type of address. Valid values: • 01: Business Location

Element	Data Type	Max Length	Required?	Definition
				• 02: Residential
				• 03: Mailing
				• 12: Billing
				The Producer Manager address type code is expressed in the **Code** attribute. The element value is the address type description.
				Note: Additional address types are user-configurable in the ORG_ADDR_CNTCT_TYPE_CD code domain on the Maintain Codes page in Producer Manager.
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
				Field reference:
				• Producer Manager: The *[AddressType]* field in the Contact Information data section of a firm producer record.
				• Database: ORG_ADDR_CNTCT.TYPE_CD (ORG_ADDR_CNTCT_TYPE_CD)
LineOne	VARCHAR2	40	Yes	The first address line of the address type. Field reference: • Producer Manager: The **Line One** field associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.LINE_ONE_ADDR
LineTwo	VARCHAR2	40	No	The second address line of the address type.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **Line Two** field associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.LINE_TWO_ADDR
LineThree	VARCHAR2	40	No	The third address line of the address type. Field reference: • Producer Manager: The **Line Three** field associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.LINE_THRE_ADDR
City	VARCHAR2	25	Yes	The city of the address type. Field reference: • Producer Manager: The **City** field associated with a specific address type in the Contact Information data section of a firml producer record. • Database: ORG_ADDR_CNTCT.CITY_NAME
PostalCode	NUMBER	11	No	The postal or ZIP code of the address type. Field reference: • Producer Manager: The **Postal Code** field associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.PSTL_CD
State	VARCHAR2	10	No	A code representing the state of the address type. Content is restricted to a set of enumerated values in the

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Element	Data Type	Max Length	Required?	Definition
				StateCodeEnumType element. Field reference: • Producer Manager: The **State** field associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.ST_CD
Country	VARCHAR2	10	No	A code representing the country of the address type. Content is restricted to a set of enumerated values that is user-configurable in the CNTRY_ADDR_CD code domain on the Maintain Codes page in Producer Manager. Field reference: • Producer Manager: The **Country** field associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.CNTRY_CD (CNTRY_CD)
County				The county of the address type is deprecated functionality in Producer Manager. The **County** child element of the AddressesContacts parent element will always be empty in an OBDF export file.
Province	VARCHAR2	10	No	A code representing the province of the address type. Content is restricted to a set of enumerated values that is user-configurable in the PROV_CD code domain on the Maintain Codes page in Producer Manager. Field reference: • Producer Manager: The **Province** field associated with a specific address type in the Contact Information data section of a firm producer record.

Element	Data Type	Max Length	Required?	Definition
				• Database: ORG_ADDR_CNTCT.PROV_CD (PROV_CD)
BadAddressIndicator	VARCHAR2	1	Yes	Indicates that a staff member has marked the address as invalid, and the correct address for the address type is unknown. Valid values: • Y: Information associated with the address type has been manually flagged by staff as invalid. • N: Information associated with the address type has not been flagged as invalid. Field reference: • Producer Manager: A 🚩 associated with a specific address type in the [Contact Information](#) data section of a firm producer record. • Database: ORG_ADDR_CNTCT.INVLD_CD
LastName	VARCHAR2	35	No	The last name of the contact person for the address type. Field reference: • Producer Manager: The **Last** field associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.LNAME
FirstName	VARCHAR2	25	No	The first name of the contact person for the address type. Field reference: • Producer Manager: The **First** field associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.FNAME

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Element	Data Type	Max Length	Required?	Definition
MiddleName	VARCHAR2	25	No	The middle name of the contact person for the address type. Field reference: • Producer Manager: The **Middle** field associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.MNAME
PhoneNumber	NUMBER	20	No	The phone number associated with the address type. Field reference: • Producer Manager: The **Phone** field associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.PH_NBR
PhoneExtensionNumber	NUMBER	6	No	The phone number extension associated with the address type. Field reference: • Producer Manager: The **Ext** field associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.PH_EXT_NBR
FaxNumber	NUMBER	20	No	The facsimile number associated with the address type. Field reference: • Producer Manager: The **Fax** field associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.FAX_PH_NBR
TollPhoneNumber	NUMBER	20	No	The toll-free phone number associated with the address type.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **Toll** field associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.TOLL_PH_NBR
TollPhoneExtensionNumber	NUMBER	6	No	The toll-free phone number extension associated with the address type. Field reference: • Producer Manager: The **Ext** field associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.TOLL_PH_EXT_NBR
Email	VARCHAR2	72	No	The email address of the contact person for the address type. Field reference: • Producer Manager: The **Email Address** field associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.EMAIL_ADDR
BUShortName	VARCHAR2	10	No	The short name code of the business unit associated with the address type. **Note**: For more information about business units, see BusinessUnits. Field reference: • Producer Manager: None • Database: BU.SHRT_NAME

Element	Data Type	Max Length	Required?	Definition
LockIndicator	VARCHAR2	1	Yes	Indicates that the information associated with the address type has been manually set to be protected from automated updates by the United States Postal Service National Change of Address feed. Field reference: • Producer Manager:A 🔒 associated with a specific address type in the Contact Information data section of a firm producer record. • Database: ORG_ADDR_CNTCT.LOCK_IND

TelephoneNumbers

Telephone number information for each individual producer included in an OBDF export is contained in the **TelephoneNumbers** element.

Note: Firm telephone number information is contained in a separate node in an OBDF export file, AddressesContacts.

If telephone number information is triggered to be included in an export, each separate instance of the TelephoneNumber child element may contain information about one of an individual producer's telephone number types.

Note: Any phone type can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks a required phone type, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.

TelephoneNumber

The **TelephoneNumber** element contains data pertaining to a single telephone number type associated with an individual producer.

The **TelephoneNumber** element contains the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the telephone number in Producer Manager. Field reference: • Producer Manager: None • Database: INDV_PH.INDV_PH_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the telephone number to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Telephone number content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- Type

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- [Number](#)
- [Extension](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the telephone number to the producer record. Field reference: • Producer Manager: None • Database: INDV_PH.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the telephone number was added to the producer record. Field reference: • Producer Manager: None • Database: INDV_PH.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the contact information on the firm producer record. Field reference: • Producer Manager: None • Database: INDV_PH.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the telephone number on the producer record was last modified. Field reference: • Producer Manager: None • Database: INDV_PH.ROW_TMSP
Type	VARCHAR2	10	Yes	The type of telephone number.

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Element	Data Type	Max Length	Required?	Definition
				Valid values: • 01: Residential • 02: Business Location • 05: Facsimile • 07: Cellular • 10: Toll-Free The Producer Manager phone type code is expressed in the **Code** attribute. The element value is the phone type description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Phone Type** field in the **Phone Information** sub-section of the <u>Contact Information</u> data section on an individual producer record. • Database: INDV_PH.PH_TYPE_CD (INDV_PREF_PH_TYPE_CD)
Number	NUMBER	20	Yes	The phone number associated with the telephone type. Field reference: • Producer Manager: The **Phone** field in the **Phone Information** sub-section of the Contact Information data section on an individual producer record. • Database: INDV_PH.PH_NBR
Extension	NUMBER	6	No	The phone number extension associated with the telephone type. Field reference: • Producer Manager: The **Ext** field in the **Phone Information** sub-section of the

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Element	Data Type	Max Length	Required?	Definition
				Contact Information data section on an individual producer record.
				• Database: INDV_PH.PH_EXT_NBR

Aliases

Alias information for each individual or firm producer included in an OBDF export is contained in the **Aliases** element.

An alias is a producer's alternate or former identity.

If alias information is triggered to be included in the export, each separate instance of the Alias child element may contain information about one of a producer's aliases.

Alias

The **Alias** element contains data pertaining to a single alias for an individual or firm producer.

Note: The **Alias** element will contain different child elements, depending on whether it is included in an individual or a firm producer record. The differences are noted in the table below.

The **Alias** element has the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the alias in Producer Manager. Field reference:

Attribute	Data Type	Max Length	Required?	Definition
				• Producer Manager: None • Database: INDV_ALS.INDV_ALS_ID or ORG_ALS.ORG_ALS_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the alias to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Alias content is expressed in the following child elements:

- InsertUserID

- InsertDateTime

- UpdateUserID

- UpdateDateTime

- State

- Type

- Name (Firm producer only)

- LastName (Individual producer only)

- FirstName (Individual producer only)

- MiddleName (Individual producer only)

- SuffixName (Individual producer only)

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- CompanyName (Individual producer only)

- EffectiveDate

- EndDate

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the alias to the producer record. Field reference: • Producer Manager: None • Database: INDV_ALS.ROW_INS_UID or ORG_ALS.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the alias was added to the producer record. Field reference: • Producer Manager: None • Database: INDV_ALS.ROW_INS_TMSP or ORG_ALS.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the alias on the producer record. Field reference: • Producer Manager: None • Database: INDV_ALS.ROW_UID or ORG_ALS.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the alias on the producer record was last modified. Field reference: • Producer Manager: None • Database: INDV_ALS.ROW_TMSP or ORG_ALS.ROW_TMSP
State	VARCHAR2	10	No	A code representing the state with which the alias is associated. Content is restricted to a set of enumerated values in the StateProvinceCodeEnumType

Element	Data Type	Max Length	Required?	Definition
				element. Field reference: • Producer Manager: The **State** field in the Aliases data section of a firm producer record; the **State** field in the **Personal Aliases** sub-section of the Aliases data section of an individual producer record, or the **State** field in the **Company Aliases** sub-section of the Aliases data section of an individual producer record • Database: ORG_ALS.ST_CD or INDV_ALS.ST_CD
Type	VARCHAR2	10	Yes	The type of alias, alternate, or former identity. Valid values are restricted to active codes configured on the Maintain Codes page in Producer Manager, as follows: • ORG_ALS_TYPE_CD code domain for firm producer aliases • INDV_ALS_TYPE_CD code domain for individual personal aliases • INDV_CO_ALS_TYPE_CD code domain for individual company aliases The Producer Manager alias type code is expressed in the **Code** attribute. The element value is the alias type description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Type** field in the Aliases data section of a firm producer record; the **Type** field in the **Personal Aliases** sub-section of the Aliases data section of an individual producer record, or the **Type** field in the **Company Aliases** sub-section of the Aliases data section of an individual producer record • Database: ORG_ALS.TYPE_CD (ORG_ALS_TYPE_CD) or INDV_ALS.TYPE_CD (INDV_ALS_TYPE_CD) or INDV_CO_ALS_TYPE_CD (INDV_CO_ALS_TYPE_CD)

Element	Data Type	Max Length	Required?	Definition
Name	VARCHAR2	155	Yes	*Firm producer record only.* The firm producer's alternate business name. Field reference: • Producer Manager: The **Name** field in the Aliases data section of a firm producer record • Database: ORG_ALS.ORG_ALS_NAME
LastName	VARCHAR2	35	Yes	*Individual producer record only.* The individual producer's alternate last name. Field reference: • Producer Manager: The **Last** field in the **Personal Aliases** sub-section of the Aliases data section of an individual producer record • Database: INDV_ALS.LNAME
FirstName	VARCHAR2	25	Yes	*Individual producer record only.* The individual producer's alternate first name. Field reference: • Producer Manager: The **First** field in the **Personal Aliases** sub-section of the Aliases data section of an individual producer record • Database: INDV_ALS.FNAME
MiddleName	VARCHAR2	25	No	*Individual producer record only.* The individual producer's alternate middle name. Field reference: • Producer Manager: The **Middle** field in the **Personal Aliases** sub-section of the Aliases data section of an individual producer record

Element	Data Type	Max Length	Required?	Definition
				• Database: INDV_ALS.MNAME
SuffixName	VARCHAR2	3	No	*Individual producer record only.* The individual producer's alternate name suffix. Field reference: • Producer Manager: The **Suffix** field in the **Personal Aliases** sub-section of the Aliases data section of an individual producer record • Database: INDV_ALS.SUF_NAME
CompanyName	VARCHAR2	72	Yes	*Individual producer record only.* The individual producer's alternate business name. Field reference: • Producer Manager: The **Name** field in the **Company Aliases** sub-section of the Aliases data section of an individual producer record • Database: INDV_ALS.CO_NAME
EffectiveDate	DATE	10	Yes	The date on which the alias became effective. Field reference: • Producer Manager: The **Effective Date** field in the Aliases data section of a firm producer record; the **Personal Aliases** sub-section of the Aliases data section of an individual producer record, or the **Company Aliases** sub-section of the Aliases data section of an individual producer record • Database: INDV_ALS.EFF_DTE or ORG_ALS.EFF_DTE
EndDate	DATE	10	No	The date on which the alias became inactive. Field reference: • Producer Manager: The **End Date** field in the Aliases data section of a firm producer record; the **Personal Aliases** sub-section of the Aliases data section of

Element	Data Type	Max Length	Required?	Definition
				an individual producer record, or the **Company Aliases** sub-section of the Aliases data section of an individual producer record • Database: INDV_ALS.END_DTE or ORG_ALS.END_DTE

Interfaces

External system identifiers for each individual or firm producer included in an OBDF export is contained in the **Interfaces** element.

If external system ID data is triggered to be included in the export, each separate instance of the Interface child element may contain an identifying code for a producer in another of your company's internal systems.

Note: External system identifiers can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks a required external sytem identifier, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.

Interface

The **Interface** element contains data pertaining to a single external system identifier for an individual or a firm producer.

The **Interface** element has the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the external system identifier in Producer Manager. Field reference: • Producer Manager: None • Database: ORG_INTRFC.ORG_INTRFC_ID or INDV_INTRFC.INDV_INTRFC_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the external system identifier information to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

External system identifier content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- Type
- ExternalID
- PrimaryIndicator
- InactiveIndicator

- [BUShortName](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the external system identifier information to the producer record. Field reference: - Producer Manager: None - Database: ORG_INTRFC.ROW_INS_UID or INDV_INTRFC.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the external system identifier information was added to the producer record. Field reference: - Producer Manager: None - Database: ORG_INTRFC.ROW_INS_TMSP or INDV_INTRFC.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the external system identifier information on the producer record. Field reference: - Producer Manager: None - Database: ORG_INTRFC.ROW_UID or INDV_INTRFC.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the external system identifier information on the producer record was last modified. Field reference: - Producer Manager: None - Database: ORG_INTRFC.ROW_TMSP or INDV_INTRFC.ROW_TMSP
Type	VARCHAR2	10	Yes	The external system in which the producer has an identifier. Valid values are restricted to active codes configured in the INTRFC_TYPE_CD code domain on

Element	Data Type	Max Length	Required?	Definition
				the Maintain Codes page in Producer Manager.
				The Producer Manager external system type code is expressed in the **Code** attribute. The element value is the external system description.
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
				Field reference: - Producer Manager: The **External System Type** field in the External System IDs data section of a producer record - Database: ORG_INTRFC.INTRFC.INTRFC_TYPE_CD (INTRFC_TYPE_CD) or INDV_INTRFC.INTRFC.INTRFC_TYPE_CD (INTRFC_TYPE_CD)
ExternalID	VARCHAR2	50	Yes	The producer's identifier or code in the external system. Field reference: - Producer Manager: The **External System Identifier** field in the External System IDs data section of a producer record - Database: ORG_INTRFC.INTRFC_ORG_ID or INDV_INTRFC.INTRFC_INDV_ID
PrimaryIndicator	VARCHAR2	1	Yes	Indicates whether the external system identifier is regarded as a priority identifier of the producer in the external system. Valid values: - Y: Yes - N: No Field reference: - Producer Manager: The **Primary** field in the External System IDs data section of a producer record

Element	Data Type	Max Length	Required?	Definition
				• Database: ORG_INTRFC.PRM_IND or INDV_INTRFC.PRM_IND
InactiveIndicator	VARCHAR2	1	Yes	Indicates whether the external system identifier is inactive. Valid values: • Y: External system identifier is inactive • N: External system identifier is active Field reference: • Producer Manager: The **Inactive** field in the External System IDs data section of a producer record • Database: ORG_INTRFC.INACT_IND or INDV_INTRFC.INACT_IND
BUShortName	VARCHAR2	10	No	The short name code of the business unit associated with the external system identifier or external system type. **Note**: For more information about business units, see BusinessUnits. Field reference: • Producer Manager: The **Business Unit** field in the External System IDs data section of a producer record • Database: BU.SHRT_NAME

ResidentStates

Resident state information for each individual or firm producer included in an OBDF export is contained in the **ResidentStates** element.

If resident state information is triggered to be included in the export, each separate instance of the ResidentState child element may contain information about one of a producer's aliases.

Note: Resident state information can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks required resident state information, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.

ResidentState

The **ResidentState** element contains data pertaining to information about a single resident state for an individual or firm producer.

The **ResidentState** element has the following attributes:

- Action

Attribute	Data Type	Max Length	Required?	Definition
Action	VARCHAR2	10	Yes	The database action that occurred that caused the resident state information to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Resident state content is expressed in the following child elements:

- InsertUserID

- [InsertDateTime](#)

- [UpdateUserID](#)

- [UpdateDateTime](#)

- [State](#)

- [LicenseExpirationDate](#)

- [CertificationEffectiveDate](#)

- [CertificationExpirationDate](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the resident state information to the producer record. Field reference: • Producer Manager: None • Database: IL_RES_ST.ROW_INS_UID or AGY_RES_ST.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the resident state information was added to the producer record. Field reference: • Producer Manager: None • Database: IL_RES_ST.ROW_INS_TMSP or AGY_RES_ST.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the resident state information on the producer record. Field reference: • Producer Manager: None • Database: IL_RES_ST.ROW_UID or AGY_RES_ST.ROW_UID

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Element	Data Type	Max Length	Required?	Definition
UpdateDateTime	DATE	19	No	The date and time stamp on which the resident state information on the producer record was last modified. Field reference: • Producer Manager: None • Database: IL_RES_ST.ROW_TMSP or AGY_RES_ST.ROW_TMSP
State	VARCHAR2	10	Yes	A code representing the resident state. Content is restricted to a set of enumerated values in the StateProvinceCodeEnumType element. Field reference: • Producer Manager: The **State** field in the Resident States data section of an producer record • Database: IL_RES_ST.ST_CD or AGY_RES_ST.ST_CD
LicenseExpirationDate	DATE	10	No	The date on which the selected producer's insurance license in the resident state expired or will expire. **Note**: A value passed in the **LicenseExpirationDate** element is manually entered only. It is not updated in Producer Manager by automated data reconciliation. Field reference: • Producer Manager: The **License Expiration Date** field in the Resident States data section of a producer record • Database: IL_RES_ST.LIC_EXPR_DTE or AGY_RES_ST.LIC_EXPR_DTE
CertificationEffectiveDate	DATE	10	No	The date on which the producer earned securities or professional designation certification in the state.

Element	Data Type	Max Length	Required?	Definition
				Note: A value passed in the **CertificationEffectiveDate** element is manually entered only. It is not updated in Producer Manager by automated data reconciliation. Field reference: • Producer Manager: The **Cert Effective Date** field in the Resident States data section of a producer record • Database: IL_RES_ST.CERT_EFF_DTE or AGY_RES_ST.CERT_EFF_DTE
CertificationExpirationDate	DATE	10	No	The date on which the producer's securities or professional designation certification in the state expired or will expire. **Note**: A value passed in the **CertificationExpirationDate** element is manually entered only. It is not updated in Producer Manager by automated data reconciliation. Field reference: • Producer Manager: The **Cert Expiration Date** field in the Resident States data section of a producer record • Database: IL_RES_ST.CERT_EXPR_DTE or AGY_RES_ST.CERT_EXPR_DTE

FirmAssociations

Data concerning associations between an individual producer and a firm producer -- or agent-to-agency affiliations -- are included in an OBDF export in the FirmAssociations element.

If firm association or affiliation data is triggered to be included in an export, an individual record contained in the export file may include separate instances of the AssociatedFirm child element and related data.

Note: Individual-to-firm association (affiliation) information exported in the OBDF is manually recorded in Producer Manager. The information is not verified against state data by means of any automated data reconciliation process.

Note: A firm association can be Vertafore-configured to be required, based on your company's business requirements. If an individual producer record lacks a required firm association, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.

AssociatedFirm

The **AssociatedFirm** element contains data pertaining to a single firm producer with which an individual producer is associated or affiliated.

The **AssociatedFirm** element contains the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the firm association in Producer Manager. Field reference: • Producer Manager: None • Database: AGY_ASSN.AGY_ASSN_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the firm association to be included in the OBDF export. Valid values: • Insert

Attribute	Data Type	Max Length	Required?	Definition
				• Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Firm association content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- TIN
- Name
- AssociationBeginDate
- AssociationEndDate
- Associations
- Interfaces

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the firm association to the individual producer record. Field reference: • Producer Manager: None

Element	Data Type	Max Length	Required?	Definition
				• Database: AGY_ASSN.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the firm association was added to the individual producer record. Field reference: • Producer Manager: None • Database: AGY_ASSN.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the firm association information on the individual producer record. Field reference: • Producer Manager: None • Database: AGY_ASSN.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the firm association information on the individual producer record was last modified. Field reference: • Producer Manager: None • Database: AGY_ASSN.ROW_TMSP
TIN	NUMBER	11	Yes	The Federal Employer Identification Number of the firm with which the individual producer is associated. Field reference: • Producer Manager: The **EIN** field in the Firm Associations data section of an individual producer record.

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Element	Data Type	Max Length	Required?	Definition
				• Database: ORG.EIN
Name	VARCHAR2	155	Yes	The business name of the firm with which the individual producer is associated. Field reference: • Producer Manager: The **Firm** field in the Firm Associations data section of an individual producer record. • Database:ORG.ORG_NAME
AssociationBeginDate	DATE	10	Yes	The date on which the individual's first state association with the firm became active. Field reference: • Producer Manager: The **Begin Date** field in the Firm Associations data section of an individual producer record. • Database: AGY_ASSN.BEG_DTE
AssociationEndDate	DATE	10	No	The date on which the individual's last state association with the firm became inactive. Included only when all state associations between the individual producer and the firm are inactive. Field reference: • Producer Manager: The **End Date** field in the Firm Associations data section of an individual producer record. • Database: AGY_ASSN.END_DTE
Associations				Detailed information about one or multiple state associations between the individual producer and the

Element	Data Type	Max Length	Required?	Definition
				firm. Refers to specific content in the Associations element.
Interfaces				The information used by your company's other systems to identify the associated firm. Refers to specific content in the Interfaces element.

IndividualAssociations

Data concerning associations that a firm producer maintains with individual producers -- or agent-to-agency affiliations -- are included in an OBDF export in the IndividualAssociations element.

If individual association or affiliation data is triggered to be included in an export, a firm record contained in the export file may include separate instances of the AssociatedIndividual child element and related data.

Note: Firm records with large numbers of associated individuals may cause performance issues in the Outbound Data Feed, especially if the feed is scheduled to run at frequent intervals or **IndividualAssociations** is set to be "force-included" in your company's OBDF configuration. For more information, please see Data Feed Configuration Options or consult your Vertafore representative.

Note: Individual-to-firm association (affiliation) information exported in the OBDF is manually recorded in Producer Manager. The information is not verified against state data by means of any automated data reconciliation process.

Note: An individual association can be Vertafore-configured to be required, based on your company's business requirements. If a firm producer record lacks a required individual association, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.

AssociatedIndividual

The **AssociatedIndividual** element contains data pertaining to a single individual producer that is associated or affiliated with a firm producer.

The **AssociatedIndividual** element contains the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the individual association in Producer Manager. Field reference: • Producer Manager: None • Database: INDV_ORG_ASSN.INDV_ORG_ASSN_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the individual association to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Individual association content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID

- [UpdateDateTime](#)

- [TIN](#)

- [Name](#)

- [AssociationBeginDate](#)

- [AssociationEndDate](#)

- [Associations](#)

- [Interfaces](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the individual association to the firm producer record. Field reference: - Producer Manager: None - Database: INDV_ORG_ASSN.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the individual association was added to the firm producer record. Field reference: - Producer Manager: None - Database: INDV_ORG_ASSN.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the individual association information on the firm producer record. Field reference: - Producer Manager: None

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Element	Data Type	Max Length	Required?	Definition
				• Database: INDV_ORG_ASSN.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the individual association information on the firm producer record was last modified. Field reference: • Producer Manager: None • Database: INDV_ORG_ASSN.ROW_TMSP
TIN	NUMBER	11	No	The associated individual producer's Social Security Number. **Note**: The **TIN** element can be globally omitted altogether from individual producer data exported through the OBDF, if the XML_EXPORT_INCL_SSN business rule is Vertafore-configured to "N (No)". For more information, please see Configuration Options in the Producer Manager online help or consult your Vertafore representative. Field reference: • Producer Manager: The **SSN** field in the **Associated Individuals** section of the report results of the Individual Associations Inquiry. (For more information, see Individual Associations.) • Database: INDV.SSN
Name	VARCHAR2	155	Yes	The associated individual producer's last, first, and middle name.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **Individual Name** field in the **Associated Individuals** section of the report results of the Individual Associations Inquiry. (For more information, see Individual Associations.) • Database: INDV.LNAME, FNAME
AssociationBeginDate	DATE	10	Yes	The date on which the individual's first state association with the firm became active. Field reference: • Producer Manager: The **Begin Date** field in the **Associated Individuals** section of the report results of the Individual Associations Inquiry. (For more information, see Individual Associations.) • Database: INDV_ORG_ASSN.BEG_DTE
AssociationEndDate	DATE	10	No	The date on which the individual's last state association with the firm became inactive. Included only when all state associations between the individual producer and the firm are inactive. Field reference: • Producer Manager: The **End Date** field in the **Associated Individuals** section of the report results of the Individual Associations Inquiry. (For more information, see Individual Associations.) • Database: INDV_ORG_ASSN.END_DTE
Associations				Detailed information about one or multiple state associations between the individual producer and the

Element	Data Type	Max Length	Required?	Definition
				firm. Refers to specific content in the Associations element.
Interfaces				The information used by your company's other systems to identify the individual producer. Refers to specific content in the Interfaces element.

Associations

State-specific information about an individual producer's firm associations or affiliations is contained in the **Associations** element.

The **Associations** element is a child element of both the AssociatedFirm element of an individual producer record and the AssociatedIndividual element of a firm producer record.

If association data is triggered to be included in the OBDF export, each separate instance of the Association child element may contain information about one of an individual producer's active or inactive state associations with a firm.

Association

The **Association** element contains data pertaining to a single individual-to-firm association in a specific state.

The **Association** element has the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the individual-to-firm association in Producer Manager.

Attribute	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: None • Database: INDV_ORG_ASSC_ST.INDV_ORG_ASSC_ST_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the individual-to-firm association information to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

State individual-to-firm association content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- State
- Type
- Position
- BeginDate
- EndDate

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Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the individual-to-firm association information to the producer record. Field reference: • Producer Manager: None • Database: INDV_ORG_ASSC_ST.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the individual-to-firm association information was added to the producer record. Field reference: • Producer Manager: None • Database: INDV_ORG_ASSC_ST.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the individual-to-firm association information on the producer record. Field reference: • Producer Manager: None • Database: INDV_ORG_ASSC_ST.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the individual-to-firm association information on the producer record was last modified. Field reference: • Producer Manager: None • Database: INDV_ORG_ASSC_ST.ROW_TMSP
State	VARCHAR2	10	Yes	A code representing the state or province in which an association between the individual producer and the firm is recorded. Content is restricted to a set of enumerated values in the StateProvinceCodeEnumType

Element	Data Type	Max Length	Required?	Definition
				element. Field reference: • Producer Manager: On an individual record, the **State** field in the **Association States** section of the Firm Associations data section. On a firm record, the **Association State** field in the **Association State** section of the report results of the Individual Associations Inquiry. (For more information, see Individual Associations.) • Database: INDV_ORG_ASSC_ST.ST_CD
Type	VARCHAR2	10	Yes	The relationship of the individual to the firm in the association state. Valid values are restricted to those that are configured in the INDV_ORG_ASSC_ASSC_CD code domain on the Maintain Codes page in Producer Manager. The Producer Manager association type code is expressed in the **Code** attribute. The element value is the association type description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: On an individual record, the **Association Type** field in the **Association States** section of the Firm Associations data section. On a firm record, the **Association Type** field in the **Association State** section of the report results of the Individual Associations Inquiry. (For more information, see Individual Associations.) • Database: INDV_ORG_ASSC_ST.ASSC_TYPE_CD (INDV_ORG_ASSC_ASSC_CD)
Position	VARCHAR2	10	No	The employment title of the individual with the firm in the association state. Valid values are restricted to those that are configured in the INDV_ORG_ASSC_POS_CD code domain on the Maintain Codes page in Producer Manager.

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Element	Data Type	Max Length	Required?	Definition
				The Producer Manager position code is expressed in the **Code** attribute. The element value is the position description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: On an individual record, the **Position** field in the **Association States** section of the Firm Associations data section. On a firm record, the **Position** field in the **Association State** section of the report results of the Individual Associations Inquiry. (For more information, see Individual Associations.) • Database: INDV_ORG_ASSC_ST.POS_CD (INDV_ORG_ASSC_POS_CD)
BeginDate	DATE	10	Yes	The date on which the individual became associated with the firm in the association state. Field reference: • Producer Manager: On an individual record, the **Begin Date** field in the **Association States** section of the Firm Associations data section. On a firm record, the **Begin Date** field in the **Association State** section of the report results of the Individual Associations Inquiry. (For more information, see Individual Associations.) • Database: INDV_ORG_ASSC_ST.BEG_DTE
EndDate	DATE	10	No	The date on which the association between the individual and the firm became inactive in the association state. Included only when the state associations between the individual producer and the firm is inactive. Field reference: • Producer Manager: On an individual record, the **End Date** field in the **Association States** section of the Firm Associations data section. On a firm record, the **End Date** field in the **Association State** section of the report results of the Individual

Element	Data Type	Max Length	Required?	Definition
				Associations Inquiry. (For more information, see Individual Associations.) • Database: INDV_ORG_ASSC_ST.END_DTE

Background Investigations

Background investigation information for each individual producer included in an OBDF export is contained in the **BackgroundInvestigations** element.

> **Note**: A background check may be initiated electronically using the Sircon Platform (Producer Manager and Producer Express) through integration with a number of leading background investigation vendors. Information about a prior background check processed offline from the Sircon Platform also may be recorded manually on a producer's record in Producer Manager. Information related to a BI obtained by either method may be included in an OBDF export file.

If background investigation information is triggered to be included in the export, each separate instance of the BackgroundInvestigation child element may contain information about one requested or recorded producer background investigation. (Note that one background investigation may contain information about multiple, different types of background checks, such as criminal, credit, education, employment, etc.)

BackgroundInvestigation

The **BackgroundInvestigation** element contains data pertaining to a single, requested or recorded background investigation.

The **BackgroundInvestigation** element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the background investigation information in Producer Manager. Field reference: • Producer Manager: None • Database: IL_BI.IL_BKGRND_INVT_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the background investigation information to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Background investigation content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- SirconRequestId
- SirconBIFirmId
- BIAssignedReferenceID
- Result

- [Status](#)

- [RequestedDate](#)

- [ResultURL](#)

- [Error](#)

- [ResultComment](#)

- [CostCenter](#)

- [BIFirmName](#)

- [ReviewResult](#)

- [SystemRecordedIndicator](#)

- [BackgroundInvestigationTypes](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the background investigation information to the producer record. Field reference: • Producer Manager: None • Database: IL_BI.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the background investigation information was added to the producer record. Field reference: • Producer Manager: None • Database: IL_BI.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the background

Element	Data Type	Max Length	Required?	Definition
				investigation information on the producer record.
				Field reference:
				• Producer Manager: The **Last Reviewed By** field in the Background Investigations data section of a producer record
				• Database: IL_BI.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the background investigation information on the producer record was last modified.
				Field reference:
				• Producer Manager: The **Last Reviewed On** field in the Background Investigations data section of a producer record
				• Database: IL_BI.ROW_TMSP
SirconRequestId	NUMBER	9	No	The system-internal identifier of the electronic background investigation transaction.
				Field reference:
				• Producer Manager: The **SIRCON Request ID** field in the Background Investigations data section of a producer record
				• Database: IL_BI.SIRCON_RQST_ID
SirconBIFirmId	NUMBER	9	Yes	The system-internal identifier of the background check vendor to which the

Element	Data Type	Max Length	Required?	Definition
				electronic background investigation transaction was submitted.
				Field reference:
				• Producer Manager: None
				• Database: IL_BI.SIRCON_BI_FIRM_ID
BIAssignedReferenceID	NUMBER	9	No	The identifier of the background investigation transaction as issued by the background check vendor. **Note**: The presence of a **BIAssignedReferenceID** indicates that the vendor acknowledges receipt of a background investigation transaction request. Field reference: • Producer Manager: None • Database: IL_BI.BI_ASSGN_REF_ID
Result	VARCHAR2	10	No	The result of the background investigation request as reported by the background check vendor. Valid values: • FAIL: Background investigation results did not pass acceptance criteria • PASS: Background investigation

Element	Data Type	Max Length	Required?	Definition
				results passed acceptance criteria • RVW: Background investigation results require staff review, based on acceptance criteria The Producer Manager result code is expressed in the **Code** attribute. The element value is the result description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **BI Firm Result** field in the Background Investigations data section of a producer record • Database: IL_BI.RSLT_CD (BI_RSLT_CD)
Status	VARCHAR2	10	Yes	A code representing the current status of the background investigation transaction. Valid values: • ERR: Transaction error • PN: Transaction pending submission to background check vendor • PROC: Transaction processed by

Element	Data Type	Max Length	Required?	Definition
				background check vendor
				• SUB: Transaction submitted to background check vendor
				• VRFD: Transaction request received by background check vendor
				The Producer Manager status code is expressed in the **Code** attribute. The element value is the status description.
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
				Field reference:
				• Producer Manager: The **Status** field in the Background Investigations data section of a producer record
				• Database: IL_BI.STS_CD (BI_STS_CD)
RequestedDate	DATE	10	Yes	The date on which the background investigation transaction was requested.
				Field reference:
				• Producer Manager: The **Request Date** field in the Background Investigations data section of a

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Element	Data Type	Max Length	Required?	Definition
				producer record • Database: IL_BI.RQST_DTE
ResultURL	VARCHAR2	255	No	The web address of the background check vendor's website, where an authorized user may log in to review detailed background investigation results. Field reference: • Producer Manager: The **Result Details** field in the Background Investigations data section of a producer record • Database: IL_BI.RSLT_WEB_ADDR
Error	VARCHAR2	2000	No	If value of the **Status** element is "ERR", a description of the processing error. Field reference: • Producer Manager: The **Error Description** field in the Background Investigations data section of a producer record • Database: IL_BI.ERR_DESC
ResultComment	VARCHAR2	2000	No	A comment returned with processing from the background check vendor. Field reference: • Producer Manager: The **Result Comment** field in the Background Investigations data section of a producer record

Element	Data Type	Max Length	Required?	Definition
				• Database: IL_BI.BI_RSLT_CMT
CostCenter	VARCHAR2	20	No	The cost center name to which the fees for the background investigation transaction were assigned. Field reference: • Producer Manager: The **Cost Center** field in the Background Investigations data section of a producer record • Database: IL_BI.COST_CNTR_NAME
BIFirmName	VARCHAR2	72	Yes	The name of the background check vendor to which the background investigation transaction was submitted. Field reference: • Producer Manager: The **BI Firm** field in the Background Investigations data section of a producer record • Database: IL_BI.BI_FIRM_NAME
ReviewResult	VARCHAR2	10	No	The result of an internal staff review of the background check vendor's background investigation result. Valid values: • FAIL: Background investigation result did not pass internal staff review • PASS: Background investigation

Element	Data Type	Max Length	Required?	Definition
				result passed internal staff review • RVW: Background investigation result pending internal staff review The Producer Manager review result code is expressed in the **Code** attribute. The element value is the review result description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Review Result** field in the Background Investigations data section of a producer record • Database: IL_BI.RVW_RSLT_CD (BI_RSLT_CD)
SystemRecordedIndicator	VARCHAR2	1	Yes	Indicates whether background investigation information was recorded manually in Producer Manager or obtained through electronic integration with a background check vendor. Valid values: • Y: Background investigation information manually recorded • N: Background investigation

Element	Data Type	Max Length	Required?	Definition
				information obtained from electronic transaction
				Field reference:
				• Producer Manager: The **Review Result** field in the Background Investigations data section of a producer record
				• Database: IL_BI.SYS_REC_IND
BackgroundInvestigationTypes				The types of background checks included in the background investigation.
				Refers to specific content in the BackgroundInvestigationTypes element.

BackgroundInvestigationTypes

Information about specific types of background investigations of an individual producer included in an OBDF export is contained in the **BackgroundInvestigationTypes** element, nested within a specific instance of the BackgroundInvestigation element.

If background investigation type information is triggered to be included in the export, each separate instance of the BackgroundInvestigationType child element may contain information about one type of background checks, such as criminal, credit, education, employment, etc.

BackgroundInvestigationType

The **BackgroundInvestigationType** element contains data pertaining to a single type of background check.

The **BackgroundInvestigationType** element has the following attributes:

• Action

Attribute	Data Type	Max Length	Required?	Definition

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Attribute	Data Type	Max Length	Required?	Definition
Action	VARCHAR2	10	Yes	The database action that occurred that caused the background investigation type to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Background check type content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- Type

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the background investigation type information to the producer record. Field reference: • Producer Manager: None • Database: IL_BI_RQST_TYPE.ROW_INS_UID

Element	Data Type	Max Length	Required?	Definition
InsertDateTime	DATE	19	No	The date and time stamp on which the background investigation type information was added to the producer record. Field reference: - Producer Manager: None - Database: IL_BI_RQST_TYPE.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the background investigation type information on the producer record. Field reference: - Producer Manager: The **Last Reviewed By** field in the Background Investigations data section of a producer record - Database: IL_BI_RQST_TYPE.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the background investigation type information on the producer record was last modified. Field reference: - Producer Manager: The **Last Reviewed By** field in the Background Investigations data section of a producer record - Database: IL_BI_RQST_TYPE.ROW_TMSP
Type	VARCHAR2	10	Yes	The type of background investigation requested or recorded. Valid values: - CREDITCHK: Credit Check - CRIMECNTY: Criminal Local/County - CRIMEFED: Criminal Federal - CRIMEST: Criminal State

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Element	Data Type	Max Length	Required?	Definition
				• EDUC: Education Verification
				• EMPHST: Employment Verification
				• LICST: Licensing State Verification
				• OTHER: Other
				The Producer Manager type code is expressed in the **Code** attribute. The element value is the type description.
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
				Field reference:
				• Producer Manager: The **Investigation Types** field in the Background Investigations data section of a producer record
				• Database: IL_BI_RQST_TYPE.RQST_TYPE_CD (BI_TYPE_CD)

RequiredItems

Required items for each individual or firm producer included in an OBDF export is contained in the **RequiredItems** element.

A required item may be an event or activity that is associated with managing a producer's compliance lifecycle, such as filing of a human resources form, driver's license copy, fingerprint card, etc.

If required items information is triggered to be included in the export, each separate instance of the RequiredItem child element may contain information about one of a producer's required items.

RequiredItem

The **RequiredItem** element contains data pertaining to a single required item of an individual or firm producer.

The **RequiredItem** element has the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the required item in Producer Manager. Field reference: • Producer Manager: None • Database: INDV_RQD_ITEM.INDV_RQD_ITEM_ID or AGY_RQD_ITEM.AGY_RQD_ITEM_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the required item to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Required item content is expressed in the following child elements:

- InsertUserID
- InsertDateTime

- [UpdateUserID](#)

- [UpdateDateTime](#)

- [Type](#)

- [State](#)

- [Status](#)

- [RequiredItemsRequests](#)

- [ReceivedDate](#)

- [OtherIdentifiers](#)

- [Comment](#)

- [BUShortName](#)

- [FollowupDate](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the required item to the producer record. Field reference: - Producer Manager: None - Database: INDV_RQD_ITEM.ROW_INS_UID or AGY_RQD_ITEM.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the required item was added to the producer record. Field reference: - Producer Manager: None - Database: INDV_RQD_ITEM.ROW_INS_TMSP or AGY_RQD_ITEM.ROW_INS_TMSP

Element	Data Type	Max Length	Required?	Definition
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the required item on the producer record. Field reference: • Producer Manager: None • Database: INDV_RQD_ITEM.ROW_UID or AGY_RQD_ITEM.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the required item on the producer record was last modified. Field reference: • Producer Manager: None • Database: INDV_RQD_ITEM.ROW_TMSP or AGY_RQD_ITEM.ROW_TMSP
Type	VARCHAR2	10	Yes	The name of the required item. Valid values are restricted to active codes configured in the RQD_ITEM_TYPE_CD code domain on the Maintain Codes page in Producer Manager. The Producer Manager required item type code is expressed in the **Code** attribute. The element value is the required item description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **Required Item** field in the Required Items data section of a producer record • Database: INDV_RQD_ITEM.TYPE_CD (RQD_ITEM_TYPE_CD) or AGY_RQD_ITEM.TYPE_CD (RQD_ITEM_TYPE_CD)
State	VARCHAR2	10	No	The name of the state associated with the required item. Valid values are restricted to active codes configured in the ST_CD code domain on the Maintain Codes page in Producer Manager. Field reference: • Producer Manager: The **State** field in the Required Items data section of a producer record • Database: INDV_RQD_ITEM.ST_CD (ST_CD) or AGY_RQD_ITEM.ST_CD (ST_CD)
Status	VARCHAR2	10	Yes	The required item's current status. Valid values: • PN: Pending • RECD: Received • RQST: Requested • WAIVED: Waived The Producer Manager status code is expressed in the **Code** attribute. The element value is the status

Element	Data Type	Max Length	Required?	Definition
				description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Status** field in the Required Items data section of a producer record • Database: INDV_RQD_ITEM.STS_CD (RQD_ITEM_STS_CD) or AGY_RQD_ITEM.STS_CD (RQD_ITEM_STS_CD)
RequiredItemsRequests				Information related to the request for the required item. Refers to specific content in the RequiredItemsRequests element.
ReceivedDate	DATE	10	No	The date on which the request for the required item was fulfilled. Field reference: • Producer Manager: The **Received Date** field in the Required Items data section of a producer record • Database: INDV_RQD_ITEM.RECD_DTE or AGY_RQD_ITEM.RECD_DTE

Element	Data Type	Max Length	Required?	Definition
OtherIdentifiers	VARCHAR2	50	No	The required item additional identifier. Field reference: - Producer Manager: The **Other Identifier** field in the Required Items data section of a producer record - Database: INDV_RQD_ITEM.OTHR_ID or AGY_RQD_ITEM.OTHR_ID
Comment	VARCHAR2	2000	No	A text comment associated with the required item. Field reference: - Producer Manager: The **Comment** field in the Required Items data section of a producer record - Database: INDV_RQD_ITEM.CMT or AGY_RQD_ITEM.CMT
BUShortName	VARCHAR2	10	No	The business unit associated with the required item. Field reference: - Producer Manager: The **Business Unit** field in the Required Items data section of a producer record - Database: BU.SHRT_NAME
FollowupDate	DATE	10	No	The date on which the request for the required item is to be reviewed. Field reference: Producer Manager: The **Follow-up Date** field in the Required Items data section of a producer record

Element	Data Type	Max Length	Required?	Definition
				• Database: INDV_RQD_ITEM.FOLW_UP_DTE or AGY_RQD_ITEM.FOLW_UP_DTE

RequiredItemsRequests

Requests for required items for an individual or firm producer included in an OBDF export is contained in the **RequiredItemsRequests** element, nested within a specific instance of the RequiredItem element.

If required items requests information is triggered to be included in the export, each separate instance of the RequiredItemsRequest child element may contain information about a request for one of a producer's required items.

RequiredItemsRequest

The **RequiredItemRequest** element contains data pertaining to a single required item request of an individual producer.

The **RequiredItemRequest** element has the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the required item request in Producer Manager. Field reference: • Producer Manager: None • Database: INDV_RQD_ITEM_RQST.INDV_RQD_ITEM_RQST_ID or AGY_RQD_ITEM_RQST.AGY_RQD_ITEM_RQST_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the required item request to be included in the OBDF export.

Attribute	Data Type	Max Length	Required?	Definition
				Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Required item request content is expressed in the following child elements:

- InsertUserID

- InsertDateTime

- UpdateUserID

- UpdateDateTime

- RequestedDate

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the required item request to the producer record. Field reference: • Producer Manager: None • Database: INDV_RQD_ITEM_RQST.ROW_INS_UID or AGY_RQD_ITEM_RQST.ROW_INS_UID

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Element	Data Type	Max Length	Required?	Definition
InsertDateTime	DATE	19	No	The date and time stamp on which the required item request was added to the producer record. Field reference: • Producer Manager: None • Database: INDV_RQD_ITEM_RQST.ROW_INS_TMSP or AGY_RQD_ITEM_RQST.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the required item request on the producer record. Field reference: • Producer Manager: None • Database: INDV_RQD_ITEM_RQST.ROW_UID or AGY_RQD_ITEM_RQST.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the required item request on the producer record was last modified. Field reference: • Producer Manager: None • Database: INDV_RQD_ITEM_RQST.ROW_TMSP or AGY_RQD_ITEM_RQST.ROW_TMSP
RequestedDate	DATE	10	Yes	The date of the required item request. Field reference: • Producer Manager: The **Requested Date** field in the Required Items data section of a producer record • Database: INDV_RQD_ITEM_RQST.RQST_DTE or AGY_RQD_ITEM_RQST.RQST_DTE

NASDJurisdictionStates

Information related to states in which an individual or firm producer is subject to FINRA jurisdiction is included in an OBDF export is contained in the **NASDJurisdictionStates** element.

If FINRA jurisdiction information is triggered to be included in the export, each separate instance of the NASDJurisdictionState child element may contain information about one of a producer's FINRA jurisdiction states.

Note: NASD (National Association Of Securities Dealers) consolidated together with other regulatory entities to become FINRA (Financial Industry Regulatory Authority) in 2007. However, to avoid breaking linkages to customer systems that depend upon the Outbound Data Feed, Vertafore has not updated the service schema to reflect the change in nomenclature.

Note: Vertafore Sircon encourages users to track and maintain producers' FINRA information in the Securities Information data section of records in Producer Manager, rather than in the FINRA Information data section. As usage of the Securities Information data section increases, the **NASDJurisdictionStates** element likely will contain less and less data.

NASDJurisdictionState

The **NASDJurisdictionState** element contains data pertaining to a single FINRA jurisdiction state for a producer.

The **NASDJurisdictionState** element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the FINRA jurisdiction state information in Producer Manager. Field reference: • Producer Manager: None • Database: AGY_NASD_JURS.AGY_NASD_JURS_ID or IL_NASD_JURS.IL_NASD_JURS_ID

Attribute	Data Type	Max Length	Required?	Definition
Action	VARCHAR2	10	Yes	The database action that occurred that caused the FINRA jurisdiction state information to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

FINRA jurisdiction state content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- State
- Status
- EffectiveDate
- TerminationDate

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the FINRA jurisdiction state information to the producer record.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: None • Database: AGY_NASD_JURS.ROW_INS_UID or IL_NASD_JURS.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the FINRA jurisdiction state information was added to the producer record. Field reference: • Producer Manager: None • Database: AGY_NASD_JURS.ROW_INS_TMSP or IL_NASD_JURS.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the FINRA jurisdiction state information on the producer record. Field reference: • Producer Manager: None • Database: AGY_NASD_JURS.ROW_UID or IL_NASD_JURS.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the FINRA jurisdiction state information on the producer record was last modified. Field reference: • Producer Manager: None • Database: AGY_NASD_JURS.ROW_TMSP or IL_NASD_JURS.ROW_TMSP
State	VARCHAR2	10	Yes	A code representing the state in which the producer is subject to FINRA jurisdiction. Content is restricted to a set of enumerated values in the StateCodeEnumType element. Field reference: • Producer Manager: The **State** field in the FINRA Information data section of a producer

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Element	Data Type	Max Length	Required?	Definition
				record • Database: AGY_NASD_JURS.JURS_ST_CD or IL_NASD_JURS.JURS_ST_CD
Status	VARCHAR2	10	Yes	The status of the producer's FINRA jurisdiction in the state. Valid values: • AC: Active • IN: Inactive The Producer Manager status code is expressed in the **Code** attribute. The element value is the status description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Status** field in the FINRA Information data section of a producer record • Database: AGY_NASD_JURS.STS_CD (STS_CD) or IL_NASD_JURS.STS_CD (STS_CD)
EffectiveDate	DATE	10	Yes	The date on which the producer's FINRA jurisdiction in the state began. Field reference: • Producer Manager: The **Effective Date** field in the FINRA Information data section of a producer record • Database: AGY_NASD_JURS.EFF_DTE or IL_NASD_JURS.EFF_DTE
TerminationDate	DATE	25	No	The date on which the producer's FINRA jurisdiction in the state ended. Field reference:

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Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: The **Termination Date** field in the FINRA Information data section of a producer record • Database: AGY_NASD_JURS.TRMN_DTE or IL_NASD_JURS.TRMN_DTE

NASDSeriesList

Information related to an individual producer's FINRA series exams is included in an OBDF export is contained in the **NASDSeriesList** element.

If FINRA series exams information is triggered to be included in the export, each separate instance of the NASDSeries child element may contain information about one of a producer's FINRA series exams.

Note: NASD (National Association Of Securities Dealers) consolidated together with other regulatory entities to become FINRA (Financial Industry Regulatory Authority) in 2007. However, to avoid breaking linkages to customer systems that depend upon the Outbound Data Feed, Vertafore has not updated the service schema to reflect the change in nomenclature.

Note: Vertafore Sircon encourages users to track and maintain producers' FINRA information in the Securities Information data section of records in Producer Manager, rather than in the FINRA Information data section. As usage of the Securities Information data section increases, the **NASDSeriesList** element likely will contain less and less data.

NASDSeries

The **NASDSeries** element contains data pertaining to one of a producer's FINRA series exams.

The **NASDSeries** element has the following attributes:

• InternalID

• Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the FINRA series exam information in Producer Manager. Field reference: - Producer Manager: None - Database: IL_NASD_SERIES.IL_NASD_SERIES_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the FINRA series exam information to be included in the OBDF export. Valid values: - Insert - Update - Delete - None Field reference: - Producer Manager: None - Database: ACTN_CD

FINRA series content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- Series

Element	Data Type	Max Length	Required?	Definition

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Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the FINRA series exam information to the producer record. Field reference: - Producer Manager: None - Database: IL_NASD_SERIES.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the FINRA series exam information was added to the producer record. Field reference: - Producer Manager: None - Database: IL_NASD_SERIES.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the FINRA series exam information on the producer record. Field reference: - Producer Manager: None - Database: IL_NASD_SERIES.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the FINRA series exam information on the producer record was last modified. Field reference: - Producer Manager: None - Database: IL_NASD_SERIES.ROW_TMSP
Series	VARCHAR2	10	Yes	A code representing the type of a producer's FINRA series exam. The Producer Manager series type code is expressed in the **Code** attribute. The element value is the series description.

Element	Data Type	Max Length	Required?	Definition
				Valid values are restricted to those that are configured in the NASD_SERIES_TYPE_CD code domain on the Maintain Codes page.
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
				Field reference: • Producer Manager: The **Series Type** field in the FINRA Information data section of a producer record • Database: IL_NASD_SERIES.TYPE_CD (NASD_SERIES_TYPE_CD)

EmploymentHistory

Employment information for each individual producer included in an OBDF export is contained in the **EmploymentHistory** element.

If employment history is triggered to be included in the export, each separate instance of the Employment child element may contain information about one of a producer's employment positions.

Employment

The **Employment** element contains data pertaining to a single employment position of an individual producer.

The **Employment** element has the following attributes:

- InternalID

- Action

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Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the employment information in Producer Manager. Field reference: • Producer Manager: None • Database: INDV_EMPT.INDV_EMPT_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the employment information to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Employment content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- EmployerName
- BeginDate
- EndDate
- City

- [State](#)
- [Province](#)
- [Country](#)
- [Position](#)
- [Salary](#)
- [PhoneNumber](#)
- [PhoneExtensionNumber](#)
- [ReasonForLeaving](#)
- [LineOne](#)
- [LineTwo](#)
- [PostalCode](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the employment information to the producer record. Field reference: • Producer Manager: None • Database: INDV_EMPT.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the employment information was added to the producer record. Field reference: • Producer Manager: None • Database: INDV_EMPT.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the employment information on the producer record.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: None • Database: INDV_EMPT.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the employment information on the producer record was last modified. Field reference: • Producer Manager: None • Database: INDV_EMPT.ROW_TMSP
EmployerName	VARCHAR2	72	Yes	The name of the employer of the position. Field reference: • Producer Manager: The **Employer Name** field in the Employment History data section of a producer record • Database: INDV_EMPT.EMPL_NAME
BeginDate	DATE	10	Yes	The date the producer started the position. Field reference: • Producer Manager: The **Begin Date** field in the Employment History data section of a producer record • Database: INDV_EMPT.BEG_DTE
EndDate	DATE	10	No	The date on which the producer vacated the position. Field reference: • Producer Manager: The **End Date** field in the Employment History data section of a producer record • Database: INDV_EMPT.END_DTE

Element	Data Type	Max Length	Required?	Definition
City	VARCHAR2	25	Yes	The address city of the producer's employment position. Field reference: • Producer Manager: The **City** field in the **Address** sub-section of the Employment History data section of a producer record • Database: INDV_EMPT.CITY_NAME
State	VARCHAR2	10	No	The address state of the producer's employment position. Content is restricted to a set of enumerated values in the StateCodeEnumType element. **Note**: **State**, **Province**, or **Country** is required data in the Producer Manager user interface. All contact information in the OBDF export file will contain one or the other. Field reference: • Producer Manager: The **State** field in the **Address** sub-section of the Employment History data section of a producer record • Database: INDV_EMPT.ST_CD
Province	VARCHAR2	10	No	The address province of the producer's employment position. Valid values are restricted to those that are configured in the PROV_CD code domain on the Maintain Codes page in Producer Manager. **Note**: **State**, **Province**, or **Country** is required data in the Producer Manager user interface. All contact information in the OBDF export file will contain one or the other. Field reference: • Producer Manager: The **Province** field in the **Address** sub-section of the

Element	Data Type	Max Length	Required?	Definition
				Employment History data section of a producer record • Database: INDV_EMPT.PROV_CD (PROV_CD)
Country	VARCHAR2	10	No	The address country of the producer's employment position. Valid values are restricted to those that are configured in the CNTRY_CD code domain on the Maintain Codes page in Producer Manager. **Note**: **State**, **Province**, or **Country** is required data in the Producer Manager user interface. All contact information in the OBDF export file will contain one or the other. Field reference: • Producer Manager: The **Province** field in the **Address** sub-section of the Employment History data section of a producer record • Database: INDV_EMPT.CNTRY_CD (CNTRY_CD)
Position	VARCHAR2	50	Yes	The employment position title. Field reference: • Producer Manager: The **Position** field in the Employment History data section of a producer record • Database: INDV_EMPT.POSN_DSCR
Salary	VARCHAR2	20	No	The annual compensation of the employment position. Field reference: • Producer Manager: The **Annual Salary** field in the Employment History data section of a producer record • Database: INDV_EMPT.SAL_DESC

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Element	Data Type	Max Length	Required?	Definition
PhoneNumber	NUMBER	20	No	The address telephone number of the producer's employment position. Field reference: • Producer Manager: The **Phone** field in the **Address** sub-section of the Employment History data section of a producer record • Database: INDV_EMPT.PH_NBR
PhoneExtensionNumber	NUMBER	6	No	The address telephone number extension of the producer's employment position Field reference: • Producer Manager: The **Phone Extension** field in the **Address** sub-section of the Employment History data section of a producer record Database: INDV_EMPT.PH_EXT_NBR
ReasonForLeaving	VARCHAR2	10	No	The reason that the selected producer vacated the position. Valid values: • CC: Changed Careers • CL: Company Liquidation • LO: Laid Of • MV: Moved • RS: Resigned • RT: Retired • SA: Salary • TR: Terminated • VO: Voluntary The Producer Manager reason code is expressed in the **Code** attribute. The element value is the reason description.

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Element	Data Type	Max Length	Required?	Definition
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Certification Date** field in the Product Certifications data section of a producer record • Database: INDV_EMPT.END_RSN_CD (EMPT_END_RSN_CD)
LineOne	VARCHAR2	40	No	The first street address line of the producer's employment position. Field reference: • Producer Manager: The **Line One** field in the **Address** sub-section of the Employment History data section of a producer record • Database: INDV_EMPT.LINE_ONE_ADDR
LineTwo	VARCHAR2	40	No	The second street address line of the producer's employment position. Field reference: • Producer Manager: The **Line Two** field in the **Address** sub-section of the Employment History data section of a producer record • Database: INDV_EMPT.LINE_TWO_ADDR
PostalCode	NUMBER	9	No	The address postal code of the producer's employment position. Field reference: • Producer Manager: The **Postal Code** field in the **Address** sub-section of the Employment History data section of a producer record • Database: INDV_EMPT.PSTL_CD

Educations

General, academic education information -- not professional education, such CE or other professional training -- for each individual producer included in an OBDF export is contained in the **Educations** element.

If education information is triggered to be included in the export, each separate instance of the Education child element may contain information about one of a producer's education background items.

Education

The **Education** element contains data pertaining to a single education background item of an individual producer.

The **Education** element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the education background item in Producer Manager. Field reference: • Producer Manager: None • Database: IL_EDUC.IL_EDUC_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the education background item to be included in the OBDF export. Valid values: • Insert • Update • Delete • None

Attribute	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: None • Database: ACTN_CD

General, academic education content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- SchoolName
- AwardedIndicator
- VerifiedIndicator
- DegreeProgram
- BeginDate
- EndDate
- State
- GradePointAverage
- Major
- City

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the education background item to the producer record. Field reference: • Producer Manager: None

Element	Data Type	Max Length	Required?	Definition
				• Database: IL_EDUC.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the education background item was added to the producer record. Field reference: • Producer Manager: None • Database: IL_EDUC.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the education background item on the producer record. Field reference: • Producer Manager: None • Database: IL_EDUC.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the education background item on the producer record was last modified. Field reference: • Producer Manager: None • Database: IL_EDUC.ROW_TMSP
SchoolName	VARCHAR2	72	Yes	The name of the educational institution where the producer attained his or her education. Field reference: • Producer Manager: The **School Name** field in the Education/Professional Designations data section of a producer record • Database: IL_EDUC.SCHL_NAME
AwardedIndicator	VARCHAR2	1	Yes	Indicates whether the producer was awarded a degree.

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Element	Data Type	Max Length	Required?	Definition
				Valid values: • Y: Yes • N: No Field reference: • Producer Manager: The **Awarded** field in the Education/Professional Designations data section of a producer record • Database: IL_EDUC.AWRD_IND
VerifiedIndicator	VARCHAR2	1	Yes	Indicates that the producer's education background item has been verified. Valid values: • Y: Yes • N: No Field reference: • Producer Manager: The **Verified** field in the Education/Professional Designations data section of a producer record • Database: IL_EDUC.VRFY_IND
DegreeProgram	VARCHAR2	10	Yes	The producer's degree program. **Note**: Valid codes are obtained from the EDUC_DGR_PGM_CD code domain on the Maintain Codes page in Producer Manager. Field reference: • Producer Manager: The **Degree Program** field in the Education/Professional Designations data section of a producer record • Database: IL_EDUC.DGR_PGM_CD (EDUC_DGR_PGM_CD)

Element	Data Type	Max Length	Required?	Definition
BeginDate	DATE	10	Yes	The date the producer began the course of study. Field reference: • Producer Manager: The **Begin Date** field in the Education/Professional Designations data section of a producer record • Database: IL_EDUC.BEG_DTE
EndDate	DATE	10	No	The date the producer concluded the course of study. Field reference: • Producer Manager: The **End Date** field in the Education/Professional Designations data section of a producer record • Database: IL_EDUC.END_DTE
State	VARCHAR2	10	Yes	A code representing the state in which the producer attained his or her education. Valid values are restricted to active codes configured in the ST_CD code domain on the Maintain Codes page in Producer Manager. Field reference: • Producer Manager: The **State** field in the Education/Professional Designations data section of a producer record • Database: IL_EDUC.ST_CD
GradePointAverage	VARCHAR2	25	No	The producer's grade point average. Field reference: • Producer Manager: The **GPA** field in the Education/Professional Designations data section of a producer record • Database: IL_EDUC.GPA_DESC
Major	VARCHAR2	50	No	The producer's major course of study.

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Element	Data Type	Max Length	Required?	Definition
				Field reference: - Producer Manager: The **Major** field in the Education/Professional Designations data section of a producer record - Database: IL_EDUC.MAJOR_DESC
City	VARCHAR2	25	Yes	The name of the city in which the producer attained his or her education. Field reference: - Producer Manager: The **City** field in the Education/Professional Designations data section of a producer record - Database: IL_EDUC.CITY_NAME

ProfessionalDesignations

Professional designations for each individual producer included in an OBDF export is contained in the **ProfessionalDesignation** element.

If professional designation information is triggered to be included in the export, each separate instance of the ProfessionalDesignation child element may contain information about one of a producer's professional designations.

ProfessionalDesignation

The **ProfessionalDesignation** element contains data pertaining to a single professional designation of an individual producer.

The **ProfessionalDesignation** element has the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the professional designation in Producer Manager. Field reference: • Producer Manager: None • Database: IL_PROF_DSGNTN.INDV_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the professional designation to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Professional designation content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- Type

Element	Data Type	Max Length	Required?	Definition

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Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the professional designation to the producer record. Field reference: • Producer Manager: None • Database: IL_PROF_DSGNTN.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the professional designation was added to the producer record. Field reference: • Producer Manager: None • Database: IL_PROF_DSGNTN.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the professional designation on the producer record. Field reference: • Producer Manager: None • Database: IL_PROF_DSGNTN.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the professional designation on the producer record was last modified. Field reference: • Producer Manager: None • Database: IL_PROF_DSGNTN.ROW_TMSP
Type	VARCHAR2	10	Yes	The type of professional designation. Valid values are restricted to those that are configured in the PROF_DSGNTN_TYPE_CD code domain on the Maintain Codes page in Producer Manager.

Element	Data Type	Max Length	Required?	Definition
				The Producer Manager professional designation type code is expressed in the **Code** attribute. The element value is the professional designation description.
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
				Field reference:
				• Producer Manager: The **Type** field in the Education/Professional Designations data section of a producer record
				• Database: IL_PROF_DSGNTN.TYPE_CD (PROF_DSGNTN_TYPE_CD)

Licenses

License data for each individual or firm producer included in an OBDF export is contained in the Licenses element.

If license data is triggered to be included in the export, each separate instance of the License child element may contain information about one of a producer's active or inactive licenses and its related qualifications.

License

The License element contains data pertaining to a single active or inactive state license of an individual or a firm producer.

The License element has the following attributes:

• InternalID

• Action

Attribute	Data Type	Max Length	Required?	Definition

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Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the license in Producer Manager. Field reference: • Producer Manager: None • Database: AGY_LIC.AGY_LIC_ID or IL_LIC.IL_LIC_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the license to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

License content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- Type
- State
- Status
- StatusDate

- [PreviousFeedStatusDate](#)

- [CopyReceivedIndicator](#)

- [EffectiveDate](#)

- [PreviousFeedEffectiveDate](#)

- [ExpirationDate](#)

- [Number](#)

- [InactivationReason](#)

- [SuspensionStartDate](#)

- [SuspensionEndDate](#)

- [Qualifications](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the license to the producer record. Field reference: - Producer Manager: The **Created By** field in the **Licenses** sub-section of the Licenses/Qualifications data section of the producer record - Database: AGY_LIC.ROW_INS_UID or IL_LIC.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the license was added to the producer record. Field reference: - Producer Manager: The **Created On** field in the **Licenses** sub-section the Licenses/Qualifications data section of the producer record - Database: AGY_LIC.ROW_INS_UIDROW_INS_TMSP or

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Element	Data Type	Max Length	Required?	Definition
				IL_LIC.ROW_INS_UIDROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the license information on the producer record. Field reference: - Producer Manager: The **Updated By** field in the **Licenses** sub-section the Licenses/Qualifications data section of the producer record - Database: AGY_LIC.ROW_UID or IL_LIC.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the license information on the producer record was last modified. Field reference: - Producer Manager: The **Updated On** field in the **Licenses** sub-section the Licenses/Qualifications data section of the producer record - Database: AGY_LIC.ROW_TMSP or IL_LIC.ROW_TMSP
Type	VARCHAR2	10	Yes	The state-specific name or description of the license. The Producer Manager license type code is expressed in the **Code** attribute. The element value is the license description. Field reference: - Producer Manager: The **License State** field in the **Licenses** sub-section of the Licenses/Qualifications data section of the producer record - Database: AGY_LIC.SYS_LIC_TYPE_CD (SYS_AGY_LIC_TYPE_CD) or IL_LIC.SYS_LIC_TYPE_CD

Element	Data Type	Max Length	Required?	Definition
				(SYS_IL_LIC_TYPE_CD)
				Note: Vertafore maintains a complete list of currently supported license codes by state. To support frequent state changes, Vertafore notifies customers via email of new and historical codes. Please contact your Vertafore representative for more information. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
State	VARCHAR2	10	Yes	A code representing the issuing regulatory jurisdiction of the license. Content is restricted to a set of enumerated values in the StateCodeEnumType element. Field reference: • Producer Manager: The **License State** field in the **Licenses** sub-section of the Licenses/Qualifications data section of the producer record • Database: AGY_LIC.ST_CD or IL_LIC.ST_CD
Status	VARCHAR2	10	Yes	The current status of the license in Producer Manager. The Producer Manager status code is expressed in the **Code** attribute. The element value is the status description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly

Element	Data Type	Max Length	Required?	Definition
				recommend mapping to the codes, not the descriptions.
				Valid values:
				- AC: Active
				- IN: Inactive
				Field reference:
				- Producer Manager: The **Status** field in the **Licenses** sub-section of the Licenses/Qualifications data section of the producer record
				- Database: AGY_LIC.STS_CD (STS_CD) or IL_LIC.STS_CD (STS_CD)
StatusDate	DATE	10	Yes	The date on which the current value of the **Status** element became effective.
				Field reference:
				- Producer Manager: The **Effective Date** field in the **Licenses** sub-section of the Licenses/Qualifications data section of the producer record
				- Database: AGY_LIC.STS_DTE or IL_LIC.STS_DTE
PreviousFeedStatusDate	DATE	10	No	The **StatusDate** that was in the last previous export file containing the identical license.
				Field reference:
				- Producer Manager: None
				- Database: AGY_LIC.PREV_FEED_STS_DTE or IL_LIC.PREV_FEED_STS_DTE
CopyReceivedIndicator	VARCHAR2	1	Yes	Indicates whether your company holds a physical copy of the license, license certificate, or letter of certification.

Element	Data Type	Max Length	Required?	Definition
				Valid values: • Y: Yes • N: No Field reference: • Producer Manager: The **Copy Rec'd** field in the **Licenses** sub-section of the Licenses/Qualifications data section of the producer record • Database: AGY_LIC.COPY_RECD_IND or IL_LIC.COPY_RECD_IND
EffectiveDate	DATE	10	Yes	The date on which the license was initially issued or granted by the state. Field reference: • Producer Manager: The **Original Issue Date** field in the **Licenses** sub-section of the Licenses/Qualifications data section of the producer record • Database: AGY_LIC.ORIG_ISS_DTE or IL_LIC.ORIG_ISS_DTE
PreviousFeedEffectiveDate	DATE	10	No	The **EffectiveDate** that was in the last previous export file containing the identical license. Field reference: • Producer Manager: None • Database: AGY_LIC.PREV_FEED_ORIG_ISS_DTE or IL_LIC.PREV_FEED_ORIG_ISS_DTE
ExpirationDate	DATE	10	No	The state-regulated date on which the license expires. Also known as the "renewal date."

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Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **Expiration Date** field in the **Licenses** sub-section of the Licenses/Qualifications section of the producer record • Database: AGY_LIC.EXPR_DTE or IL_LIC.EXPR_DTE **Note**: Included usually for a license from a state that requires periodic license renewal. May include a manually-recorded value for a license from a state that issues perpetual licenses or as inserted by a programmatic data normalizer during automated data reconciliation. For more information, refer to the Producer Manager online help.
Number	VARCHAR2	15	No	The state license number or identifier. Field reference: • Producer Manager: The **License Number** field in the **Licenses** sub-section of the Licenses/Qualifications data section of the producer record • Database: AGY_LIC.AGY_LIC_NBR or IL_LIC.IL_LIC_NBR
InactivationReason	VARCHAR2	10	No	The state-specific reason for inactivation of the producer's license. The Producer Manager inactivation reason code is expressed in the **Code** attribute. The element value is the inactivation reason description. Included only with a qualification with a **Status** of 'IN." Content is restricted to a set of enumerated values in the

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Element	Data Type	Max Length	Required?	Definition
				LicenseTermCodeEnumType element. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Inactivation Reason** field in the **Licenses** sub-section of the Licenses/Qualifications data section of the producer record • Database: AGY_LIC.IN_RSN_CD (SYS_LIC_TRMN_RSN_CD) or IL_LIC.IN_RSN_CD (SYS_LIC_TRMN_RSN_CD) **Note**: If an inactive license in Producer Manager is obtained from state data through automated data reconciliation with the national Producer Database (PDB), then the OBDF export file will include a default inactivation reason code of "006" and a description of "Canceled." **Note**: If a user manually inactivates a license, the OBDF export file will include an inactivation reason code that is specific to the state that issued the license/qualification. Vertafore maintains state-specific inactivation reason codes in the system.
SuspensionStartDate	DATE	10	No	The date on which the issuing regulatory jurisdiction suspended the license.

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Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **License Suspend Begin Date** field in the **Licenses** sub-section of the Licenses/Qualifications data section of the producer record • Database: AGY_LIC.SUSP_BEG_DTE or IL_LIC.SUSP_BEG_DTE
SuspensionEndDate	DATE	10	No	The date on which the issuing regulatory jurisdiction reinstated the suspended license. Field reference: • Producer Manager: The **License Suspend End Date** field in the **Licenses** sub-section of the Licenses/Qualifications data section of the producer record • Database: AGY_LIC.SUSP_END_DTE or IL_LIC.SUSP_END_DTE
Qualifications				The active or inactive qualifications (a.k.a., license lines, lines of authority, or LOA) related to the license. Refers to specific content in the Qualifications element.

Qualifications

Qualifications (a.k.a., line of authority or LOA) data for each individual or firm producer included in an OBDF export is contained in the Qualifications element, nested within a specific instance of the License element.

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> **Note**: The same qualifications contained in the Qualifications child element of the Licenses node also are expressed in a separate **Qualifications** node in an OBDF export file. We strongly recommend consuming the qualifications information represented in the Licenses node, in order to preserve the relationships between a license and its related LOA (qualifications). In so doing, the data in the separate **Qualifications** node can be ignored.

If qualification data is triggered to be included with license data in the export, each separate instance of the Qualification child element may contain information about one of a producer's active or inactive qualifications related to the license.

Qualification

The Qualification element contains data pertaining to a single active or inactive state qualification (line of authority or LOA) related to an individual or a firm producer's license.

The Qualification element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the qualification in Producer Manager. Field reference: • Producer Manager: None • Database: AGY_QUAL.AGY_QUAL_ID or IL_QUAL.IL_QUAL_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the qualification to be included in the OBDF export. Valid values: • Insert • Update • Delete

Attribute	Data Type	Max Length	Required?	Definition
				• None
				Field reference:
				• Producer Manager: None
				• Database: ACTN_CD

Qualification content is expressed in the following child elements:

- InsertUserID

- InsertDateTime

- UpdateUserID

- UpdateDateTime

- Type

- State

- IssueDate

- PreviousFeedIssueDate

- Status

- StatusDate

- PreviousFeedStatusDate

- ExpirationDate

- InactivationReason

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the qualification to the individual producer record. Field reference:

Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: The **Created By** field in the **Qualifications** sub-section of the Licenses/Qualifications data section of the producer record • Database: AGY_QUAL.ROW_INS_UID or LIC_QUAL.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the qualification was added to the individual producer record. Field reference: • Producer Manager: The **Created On** field in the **Qualifications** sub-section of the Licenses/Qualifications data section of the producer record • Database: AGY_QUAL.ROW_INS_TMSP or IL_QUAL.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the qualification information on the individual producer record. Field reference: • Producer Manager: The **Updated By** field in the **Qualifications** sub-section of the Licenses/Qualifications section of the producer record • Database: AGY_QUAL.ROW_UID or IL_QUAL.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the qualification information on the individual producer record was last modified. Field reference: • Producer Manager: The **Updated On** field in the **Qualifications** sub-section of the Licenses/Qualifications data section of the producer record • Database: AGY_QUAL.ROW_TMSP or IL_QUAL.ROW_TMSP
Type	VARCHAR2	10	Yes	The state-specific name or description of the qualification. The Producer Manager qualification code is expressed in the **Code** attribute. The element value is the qualification description.

Element	Data Type	Max Length	Required?	Definition
				Field reference: - Producer Manager: The **State** field in the **Qualifications** sub-section of the Licenses/Qualifications data section of the producer record - Database: IL_QUAL.SYS_QUAL_CD (SYS_QUAL_CD) or AGY_QUAL.SYS_QUAL_CD (SYS_QUAL_CD) **Note**: Vertafore maintains a complete list of currently supported qualification codes by state. To support frequent state changes, Vertafore notifies customers via email of new and retired codes. Please contact your Vertafore representative for more information. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
State	VARCHAR2	10	Yes	A code representing the issuing regulatory jurisdiction of the qualification. Content is restricted to a set of enumerated values in the StateCodeEnumType element. Field reference: - Producer Manager: The **License State** field in the **Qualifications** sub-section of the Licenses/Qualifications data section of the producer record - Database: IL_QUAL.ST_CD or AGY_QUAL.ST_CD
IssueDate	DATE	10	No	The date on which the qualification was initially issued or granted by the state. Field reference: - Producer Manager: The **Original Issue Date** field in the **Qualifications** sub-section of the Licenses/Qualifications data section of the producer record - Database: IL_QUAL.ORIG_ISS_DTE or AGY_QUAL.ORIG_ISS_DTE

Element	Data Type	Max Length	Required?	Definition
PreviousFeedIssueDate	DATE	10	No	The **IssueDate** that was in the last previous export file containing the identical qualification. Field reference: • Producer Manager: None • Database: IL_QUAL.PREV_FEED_ORIG_ISS_DTE or AGY_QUAL.PREV_FEED_ORIG_ISS_DTE
Status	VARCHAR2	10	Yes	The current status of the qualification in Producer Manager. Valid values: • AC: Active • IN: Inactive The Producer Manager status code is expressed in the **Code** attribute. The element value is the status description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Status** field in the **Qualifications** sub-section of the Licenses/Qualifications data section of the producer record • Database: IL_QUAL.STS_CD (STS_CD) or AGY_QUAL.STS_CD (STS_CD)
StatusDate	DATE	10	Yes	The date on which the current value of the **Status** element became effective. Field reference: • Producer Manager: The **Effective Date** field in the **Qualifications** sub-section of the Licenses/Qualifications data section of the producer record

Element	Data Type	Max Length	Required?	Definition
				• Database: IL_QUAL.STS_DTE or AGY_QUAL.STS_DTE
PreviousFeedStatusDate	DATE	10	No	The **StatusDate** that was in the last previous export file containing the identical qualification. Field reference: • Producer Manager: None • Database: IL_QUAL.PREV_FEED_STS_DTE or AGY_QUAL.PREV_FEED_STS_DTE
ExpirationDate	DATE	10	No	The state-regulated date on which the qualification expires. Also known as the "renewal date." Field reference: • Producer Manager: The **Expiration Date** field in the **Qualifications** sub-section of the Licenses/Qualifications section of the producer record • Database: IL_QUAL.EXPR_DTE or AGY_QUAL.EXPR_DTE **Note**: Included usually for a license from a state that requires periodic renewal of qualifications. May include a manually-recorded value for a qualification from a state that issues perpetual licenses or as inserted by a programmatic data normalizer during automated data reconciliation. For more information, refer to the Producer Manager online help.
InactivationReason	VARCHAR2	10	No	The state-specific reason for inactivation of the producer's qualification. The Producer Manager inactivation reason code is expressed in the **Code** attribute. The element value is the inactivation reason description. Included only with a qualification with a **Status** of 'IN." Content is restricted to a set of enumerated values in the

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Element	Data Type	Max Length	Required?	Definition
				QualificationTermCodeEnumType element. Field reference: • Producer Manager: The **Inactivation Reason** field in the **Qualifications** sub-section of the Licenses/Qualifications data section of the producer record • Database: IL_QUAL.IN_RSN_CD (SYS_QUAL_TRMN_RSN_CD) or AGY_QUAL.IN_RSN_CD (SYS_QUAL_TRMN_RSN_CD) **Note**: If an inactive qualification in Producer Manager is obtained from state data through automated data reconciliation with the national Producer Database (PDB), then the OBDF export file will include a default inactivation reason code of "006" and a description of "Canceled." **Note**: If a user manually inactivates a qualification, the OBDF export file will include an inactivation reason code that is specific to the state that issued the license/qualification. Vertafore maintains state-specific inactivation reason codes in the system.

Appointments

Company appointment data for each individual or firm producer included in an OBDF export is contained in the Appointments element.

If state appointment data is triggered to be included in the export, each separate instance of the Appointment child element may contain information about information about one of a producer's active and terminated appointments and related appointment requests in a given appointing jurisdiction (state).

Appointment

The Appointment element contains data pertaining to a single company state appointment of an individual or a firm producer.

The Appointment element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the appointment in Producer Manager. Field reference: • Producer Manager: None • Database: AGY_APPT.AGY_APPT_ID or IL_APPT.IL_APPT_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the appointment to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Appointment content is expressed in the following child elements:

- InsertUserID

- InsertDateTime

- UpdateUserID

- UpdateDateTime

- State

- CompanyNAIC_ID

- CompanyName

- PayCode

- Type

- Status

- ActiveDate

- PreviousFeedActiveDate

- RenewalDate

- TerminationDate

- PreviousFeedTerminationDate

- TerminationNotificationDate

- TerminationReason

- TerminationVestingType

- AssociatedIndividualSSN (Firm appointments only)

- AssociatedIndividualLastName (Firm appointments only)

- AssociatedIndividualFirstName (Firm appointments only)

- StateVerifiedIndicator

- RecordOnlyIndicator

- ResidentCounty (Individual appointments only)

- Requests

- Counties (Individual appointments only)

- TrackingIdentifiers

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the appointment to the producer record.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **Created by** field in the Appointments data section of the producer record • Database: IL_APPT.ROW_INS_UID or AGY_APPT.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the appointment was added to the producer record. Field reference: • Producer Manager: The **Created on** field in the Appointments data section of the producer record • Database: IL_APPT.ROW_INS_TMSP or AGY_APPT.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the appointment information on the producer record. Field reference: • Producer Manager: The **Updated by** field in the Appointments data section of the producer record • Database: IL_APPT.ROW_UID or AGY_APPT.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the appointment information on the producer record was last modified. Field reference: • Producer Manager: The **Updated on** field in the Appointments data section of the producer record • Database: IL_APPT.ROW_TMSP or AGY_APPT.ROW_TMSP

Element	Data Type	Max Length	Required?	Definition
State	VARCHAR2	10	Yes	A code representing the regulatory jurisdiction in which the producer is appointed. Content is restricted to a set of enumerated values in the StateCodeEnumType element. Field reference: • Producer Manager: The **State** field in the Appointments data section of the producer record • Database: IL_APPT.ST_CD or AGY_APPT.ST_CD
CompanyNAIC_ID	NUMBER	5	Yes	The National Association of Insurance Commissioners identifier of the appointing company. Field reference: • Producer Manager: The **NAIC ID** field in the Appointments data ection of the producer record • Database: ORG.NAIC_ID
CompanyName	VARCHAR2	155	Yes	The name of the appointing company with which the producer is appointed. Field reference: • Producer Manager: The **Writing Company** field in the Appointments data section of the producer record • Database: ORG.ORG_NAME
PayCode	VARCHAR2	10	No	The status of the producer's final commission payment following termination. Valid values are restricted to those that are configured in the RC_PRDCR_PAY_CD code domain on the Maintain Codes page. The Producer Manager pay code is expressed in the **Code**

Element	Data Type	Max Length	Required?	Definition
				attribute. The element value is the pay code description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Payment Status** field on the Company Relationships page • Database: RC_IL.PAY_CD (RC_PRDCR_PAY_CD) or RC_AGY.PAY_CD (RC_PRDCR_PAY_CD)
Type	VARCHAR2	10	Yes	The state-specific name or description of the appointment. The Producer Manager appointment type code is expressed in the **Code** attribute. The element value is the appointment type description. **Note**: Vertafore maintains a complete list of currently supported appointment type codes by state. To support frequent state changes, Vertafore notifies customers via email of new and retired codes. Please contact your Vertafore representative for more information. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Appt Type** field in the

Element	Data Type	Max Length	Required?	Definition
				Appointments data section of the producer record • Database: IL_APPT.SYS_APPT_TYPE_CD (SYS_APPT_TYPE_CD) or AGY_APPT.SYS_APPT_TYPE_CD (SYS_APPT_TYPE_CD) **Note**: Vertafore maintains a complete list of currently supported appointment type codes by state. To support frequent state changes, Vertafore notifies customers via email of new and retired codes. Please contact your Vertafore representative for more information.
Status	VARCHAR2	10	Yes	The current status of the appointment in Producer Manager. Valid values: • AC: Active • ACPN: Active - Pending Submission • ACSBMT: Active - Pending State Approval • IN: Inactive • INPN: Inactive - Pending Submission • INSBMT: Inactive - Pending State Approval • PN: Pending The Producer Manager status code is expressed in the **Code** attribute. The element value is the status description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend

Element	Data Type	Max Length	Required?	Definition
				mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Status** field in the Appointments data section of the producer record • Database: IL_APPT.STS_CD (APPT_STS_CD) or AGY_APPT.STS_CD (APPT_STS_CD)
ActiveDate	DATE	10	Yes	The appointment's effective date. **Note**: Available for either active or inactive appointments. Field reference: • Producer Manager: The **Active Date** field in the Appointments data section of the producer record • Database: IL_APPT.ACTV_DTE or AGY_APPT.ACTV_DTE
PreviousFeedActiveDate	DATE	10	No	The **ActiveDate** that was in the last previous export file containing the identical appointment. Field reference: • Producer Manager: None • Database: IL_APPT.PREV_FEED_ACTV_DTE or AGY_APPT.PREV_FEED_ACTV_DTE
RenewalDate	DATE	10	No	The calculated renewal date of the appointment. **Note**: A producer's appointment data in Producer Manager

Element	Data Type	Max Length	Required?	Definition
				does not contain renewal date information. Field reference: • Producer Manager: None • Database: IL_APPT.RNWL_DTE or AGY_APPT.RNWL_DTE
TerminationDate	DATE	10	No	The date on which the appointment became inactive. Included only with an appointment with a **Status** of 'IN." Field reference: • Producer Manager: The **Term Date** field in the Appointments data section of the producer record • Database: IL_APPT.TRMN_DTE or AGY_APPT.IL_TRMN_DTE
PreviousFeedTerminationDate	DATE	10	No	The **TerminationDate** that was in the last previous export file containing the identical appointment. Field reference: • Producer Manager: None • Database: IL_APPT.PREV_FEED_TRMN_DTE or AGY_APPT.PREV_FEED_TRMN_DTE
TerminationNotificationDate	DATE	10	No	The date on which notification of the appointment termination was sent to the producer. **Note**: A producer's appointment data in Producer Manager does not contain termination notification date information.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: None • Database:IL_APPT.TRMN_NTF_DTE OR AGY_APPT.TRMN_NTF_DTE
TerminationReason	VARCHAR2	10	No	The state-specific reason for the appointment termination. The Producer Manager termination reason code is expressed in the **Code** attribute. The element value is the termination reason description. Content is restricted to a set of enumerated values in the AppointmentTermCodeEnumType element. **Note**: When mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Term Reason** field in the Appointments data section of the producer record • Database: IL_APPT.TRMN_RSN_CD (SYS_APPT_TRMN_RSN_CD) or AGY_APPT.TRMN_RSN_CD (SYS_APPT_TRMN_RSN_CD)
TerminationVestingType	VARCHAR2	10	No	The length of time after termination that the producer will qualify for residual commissions. Valid values are restricted to those that are configured in the TRMN_VEST_TYPE_CD code domain on the Maintain Codes page. The Producer Manager termination vesting type code is

Element	Data Type	Max Length	Required?	Definition
				expressed in the **Code** attribute. The element value is the termination vesting type description.
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
				Field reference: • Producer Manager: The **Term Vesting Period** field on the Company Relationships page • Database: RC_IL.TRMN_VEST_TYPE_CD or RC_AGY.TRMN_VEST_TYPE_CD
AssociatedIndividualSSN (Firm appointments only)	NUMBER	11	No	The Social Security Number of an individual producer associated with the appointed or terminated firm. **Note**: This element is used to convey information about individual producers who do not hold an active appointment in a state but are considered appointed there by virtue of their affiliation with a firm that does hold an active state appointment -- a so-called "shared appointment." It will contain data only in a state that allows or regulates "shared appointments." **Note**: The **AssociatedIndividualSSN** element can be globally omitted altogether from individual producer data exported through the OBDF, if the XML_EXPORT_INCL_SSN business rule is Vertafore-configured to "N (No)". For more information, please see Configuration Options in the Producer Manager online help or

Element	Data Type	Max Length	Required?	Definition
				consult your Vertafore representative. Field reference: • Producer Manager: None • Database: INDV.SSN
AssociatedIndividualLastName (Firm appointments only)	VARCHAR2	35	No	The last name of an individual producer associated with the appointed or terminated firm. **Note**: This element is used to convey information about individual producers who do not hold an active appointment in a state but are considered appointed there by virtue of their affiliation with a firm that does hold an active state appointment -- a so-called "shared appointment." It will contain data only in a state that allows or regulates "shared appointments." Field reference: • Producer Manager: None • Database: INDV.LNAME
AssociatedIndividualFirstName (Firm appointments only)	VARCHAR2	25	No	The first name of an individual producer associated with the appointed or terminated firm. **Note**: This element is used to convey information about individual producers who do not hold an active appointment in a state but are considered appointed there by virtue of their affiliation with a firm that does hold an active state appointment -- a so-called "shared appointment." It will contain data only in a state that allows or regulates "shared

Element	Data Type	Max Length	Required?	Definition
				appointments." Field reference: • Producer Manager: None • Database: INDV.FNAME
StateVerifiedIndicator	VARCHAR2	1	Yes	Indicates if the appointment state has verified the appointment. Valid values: • Y: The appointment was submitted through Producer Manager or Producer Express and processed by the appointment state OR is a "record-only" (manually recorded) appointment that has been verified with state records through automated data reconciliation. • N: The appointment has not been processed by a state or may not exist in state records. Note that this may include pending appointment requests. Field reference: • Producer Manager: The **State Verified** field in the Appointments data section of the producer record • Database: IL_APPT.ST_VRFD_IND or AGY_APPT.ST_VRFD_IND
RecordOnlyIndicator	VARCHAR2	1	Yes	Indicates if the appointment is only recorded in Producer Manager. Valid values: • Y: The appointment was manually recorded on the producer's record or has been added to the record through automated data reconciliation.

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Element	Data Type	Max Length	Required?	Definition
				• N: The appointment was not manually recorded and was submitted through PLM (Producer Manager or Producer Express) to a state Field reference: • Producer Manager: The **Record Appt** field in the Appointments data section of the producer record • Database: IL_APPT.SYS_REC_APPT_IND or AGY_APPT.SYS_REC_APPT_IND
				Note: Use the following guidelines when analyzing information in the **StateVerifiedIndicator** and **RecordOnlyIndicator** fields: a) If **StateVerifiedIndicator** or **RecordOnlyIndicator** both contain values of "N," an appointment request submitted to an appointment state is still pending submission or state processing; b) if **StateVerifiedIndicator** contains a value of "Y," but **RecordOnlyIndicator** contains a value of "N," an appointment request submitted to a state has been processed (either Approved or Denied); c) if **StateVerifiedIndicator** contains a value of "N" but **RecordOnlyIndicator** contains a value of "Y," a record-only appointment has been added, and d) if both **StateVerifiedIndicator** and **RecordOnlyIndicator** contain a value of "Y," then an appointment has been added but also verified against state appointment data, such as an appointment added during an initial producer data load using Quick Load Producers or manually recorded but confirmed with state data through Quick Sync Producer or Scheduled Sync.
ResidentCounty (Individual appointments only)	VARCHAR2	10	No	The appointed producer's resident county. May be used for appointment or appointment termination transactions in a state that requires resident county information to be included. Content is restricted to a set of enumerated values in the CountyCodeEnumType element. The Producer Manager county code is expressed in the **Code** attribute. The element value is the county name. **Note**: When mapping data from the OBDF export file to your company's internal systems, we strongly recommend

Element	Data Type	Max Length	Required?	Definition
				mapping to the codes, not the descriptions. **Note**: The **ResidentCounty** element may contain a value only for a Florida appointment of a resident producer. Field reference: • Producer Manager: None • Database: IL_APPT.RES_CNTY_CD (FL_CNTY_CD)
Requests				State appointment request related to the producer appointment. Refers to specific content in the Requests element.
Counties (Individual appointments only)				County appointment information in a state that may require both state and county producer appointments. **Note**: Currently only Florida requires county appointments for certain entity and appointment types. For more information, see the **Notes** and **Tips** sections of the Add Appointments page in the Producer Manager online help. Refers to specific content in the Counties element.
TrackingIdentifiers				Customer-supplied tracking information for appointment or appointment termination transactions initiated through Sircon Producer Express by a call to the **Producer Management Web Service**. Refers to specific content in the TrackingIdentifiers element.

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Element	Data Type	Max Length	Required?	Definition
				Note: **TrackingIdentifiers** will include data only if your company also subscribes to Sircon Producer Express and is configured to initiate appointment requests through the **Producer Management Web Service**. Otherwise an empty element is exported.

Counties

County appointment data related to a state appointment for each individual or firm producer included in an OBDF export is contained in the Counties element.

If county appointment data is triggered to be included in the export, separate instances of the County child element may contain information about all of a producer's active and terminated appointments and related appointment requests.

County

The County element contains data pertaining to a single county appointment of an individual or a firm producer.

Note: For Florida non-resident, state-level appointments only, the **Counties** element will contain no data. For Florida non-resident, county-level appointments, a **County** child element will be populated with **CountyName**, **Status**, and **ActiveDate** for each county appointment.

The County element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the county appointment in Producer Manager.

Attribute	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: None • Database: IL_APPT_CNTY.IL_APPT_CNTY_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the county appointment information to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

County appointment content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- CountyName
- Status
- ActiveDate
- TerminationDate
- TerminationReason
- StateVerifiedIndicator

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the county appointment to the producer record. Field reference: • Producer Manager: The **Created by** field in the Appointments data section of the producer record • Database: IL_APPT_CNTY.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the appointment was added to the producer record. Field reference: • Producer Manager: The **Created on** field in the Appointments data section of the producer record • Database: IL_APPT_CNTY.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the appointment information on the producer record. Field reference: • Producer Manager: The **Updated by** field in the Appointments data section of the producer record • Database: IL_APPT_CNTY.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the appointment information on the producer record was last modified. Field reference: • Producer Manager: The **Updated on** field in the Appointments data section of the producer record • Database: IL_APPT_CNTY.ROW_TMSP
CountyName	VARCHAR2	10	Yes	The county in which the producer is appointed.

Element	Data Type	Max Length	Required?	Definition
				Content is restricted to a set of enumerated values in the CountyCodeEnumType element. The Producer Manager county code is expressed in the **Code** attribute. The element value is the county name. **Note**: When mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: - Producer Manager: The **County Name** field in the Appointment Counties subsection of the Appointments data section of the producer record - Database: IL_APPT_CNTY.CNTY_CD
Status	VARCHAR2	10	Yes	The current status of the county appointment in Producer Manager. Valid values: - AC: Active - ACPN: Active - Pending Submission - ACSBMT: Active - Pending State Approval - IN: Inactive - INPN: Inactive - Pending Submission - INSBMT: Inactive - Pending State Approval - PN: Pending Field reference: - Producer Manager: The **Status** field in the Appointment Counties subsection of the Appointments data section of the producer record

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Element	Data Type	Max Length	Required?	Definition
				• Database: IL_APPT_CNTY.STS_CD (APPT_STS_CD)
ActiveDate	DATE	10	Yes	The county appointment's effective date. **Note**: Available for either active or inactive appointments. Field reference: • Producer Manager: The **Active Date** field in the Appointment Counties subsection of the Appointments data section of the producer record • Database: IL_APPT_CNTY.ACTV_DTE
TerminationDate	DATE	10	No	The date on which the county appointment became inactive. Included only with a county appointment with a **Status** of 'IN." Field reference: • Producer Manager: The **Term Date** field in the Appointment Counties subsection of the Appointments data section of the producer record • Database: IL_APPT_CNTY.TRMN_DTE
TerminationReason	VARCHAR2	10	No	The state-specific reason for the county appointment termination. The Producer Manager termination reason code is expressed in the **Code** attribute. The element value is the termination reason description. Content is restricted to a set of enumerated values in the AppointmentTermCodeEnumType element. Field reference: • Producer Manager: The **Term Reason** field in the Appointment Counties subsection of the Appointments data section of the producer record • Database: IL_APPT_CNTY.TRMN_RSN_CD (SYS_APPT_TRMN_RSN_CD)

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Element	Data Type	Max Length	Required?	Definition
				Note: When mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
StateVerifiedIndicator	VARCHAR2	1	Yes	Indicates if the appointment state has verified the appointment. Valid values: • Y: The appointment was submitted through Producer Manager or Producer Express and processed by the appointment state OR is a "record-only" (manually recorded) appointment that has been verified with state records through an automated data reconciliation • N: The appointment has not been processed by a state or may not exist in state records. Note that this may include pending appointment requests Field reference: • Producer Manager: The **State Verified** field in the Appointment Counties subsection of the Appointments data section of the producer record • Database: IL_APPT_CNTY.ST_VRFD_IND

Requests

State request information related to an appointment for each individual or firm producer included in an OBDF export is contained in the Requests element.

If appointment data is triggered to be included in the export, separate instances of the Request child element may contain information about all of the requests related to a producer's active and terminated appointments.

> **Note**: The OBDF export will contain information relating only to appointment or appointment termination requests submitted through Producer Manager or Producer Express. If your company uses Vertafore outsourcing services, the OBDF export will also include outsourced requests.

Request

The Request element contains data pertaining to a single request related to a company appointment of an individual or a firm producer.

The Request element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the request in Producer Manager. Field reference: • Producer Manager: None • Database: APPT_RQST.APPT_RQST_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the request information to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Appointment request content is expressed in the following child elements:

- [InsertUserID](#)

- [InsertDateTime](#)

- [UpdateUserID](#)

- [UpdateDateTime](#)

- [AppointmentAction](#)

- [SubmitStatus](#)

- [SubmitStatusDate](#)

- [ResponseDate](#)

- [RejectedReasonDescription](#)

- [ElectronicAppointmentIndicator](#)

- [FirmLicenseName](#)

- [IndividualLicenseLastName](#)

- [IndividualLicenseFirstName](#)

- [IndividualLicenseMiddleName](#)

- [IndividualLicenseSuffixName](#)

- [FirstBusinessDate](#)

- [BIProcessing](#)

- [BIInstruction](#)

- [CostCenterName](#)

- [LicenseCategory](#)

- [Counties](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the request information to the producer record.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **Created by** field in the Appointment Requests sub-section of the Appointments data section of the producer record • Database: APPT_RQST.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the request information was added to the producer record. Field reference: • Producer Manager: The **Created on** field in the Appointment Requests sub-section of the Appointments data section of the producer record • Database: APPT_RQST.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the request information on the producer record. Field reference: • Producer Manager: The **Updated by** field in the Appointment Requests sub-section of the Appointments data section of the producer record • Database:APPT_RQST. ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the request information on the producer record was last modified. Field reference: • Producer Manager: The **Updated on** field in the Appointment Requests sub-section of the Appointments data section of the producer record • Database: APPT_RQST.ROW_TMSP

Element	Data Type	Max Length	Required?	Definition
AppointmentAction	VARCHAR2	10	Yes	The submitted transaction request type. Valid values: - APPT: Appointment - APPTRM: Appointment Termination Field reference: - Producer Manager: The **Action** field in the Appointment Requests sub-section of the Appointments data section of the producer record - Database: APPT_RQST.APPT_ACTN_CD
SubmitStatus	VARCHAR2	10	Yes	The status of the transaction request. Valid values: - AP: Approved - DN: Denied - PN: Pending - SBMT: Submitted to Sircon - ERR: Error - FAIL: Transaction Request Failed Field reference: - Producer Manager: The **Submit Status** field in the Appointment Requests sub-section of the Appointments data section of the producer record - Database: APPT_RQST.SBMT_STS_CD
SubmitStatusDate	DATE	10	Yes	The date on which the transaction request was submitted. Field reference:

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Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: The **Submit Date** field in the Appointment Requests sub-section of the Appointments data section of the producer record • Database: APPT_RQST.SBMT_DTE
ResponseDate	DATE	10	No	The date on which the state to which the request was submitted responded to the transaction request. Field reference: • Producer Manager: The **Resp Date** field in the Appointment Requests sub-section of the Appointments data section of the producer record • Database: APPT_RQST.RESP_DTE
RejectedReasonDescription	VARCHAR2	2000	No	The state-specific reason for denying the transaction request. **Note**: This field may be populated even with an approved appointment request. No code is passed; only clear text. Field reference: • Producer Manager: The **Reject Reason** field in the Appointment Requests sub-section of the Appointments data section of the producer record • Database: APPT_RQST.RJCT_RSN_DESC
ElectronicAppointmentIndicator	VARCHAR2	1	Yes	Indicates whether the request was submitted electronically. Valid values: • Y: Yes • N: No

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: None • Database: APPT_RQST.ELEC_APPT_IND **Note**: Only electronic transaction requests display in the Appointment Requests sub-section of the Appointments section of a producer record in Producer Manager. For an appointment that is manually recorded on a producer record, the following message will display in Producer Manager: "No appointment requests."
FirmLicenseName	VARCHAR2	155	Yes	The name of the firm on the appointment transaction request. Field reference: • Producer Manager: None • Database: APPT_RQST.AGY_ORG_NAME
IndividualLicenseLastName	VARCHAR2	35	Yes	The last name of the individual licensee on the appointment transaction request. Field reference: • Producer Manager: None • Database: APPT_RQST.INDV_LNAME
IndividualLicenseFirstName	VARCHAR2	25	Yes	The first name of the individual licensee on the appointment transaction request. Field reference: • Producer Manager: None • Database: APPT_RQST.INDV_FNAME

Element	Data Type	Max Length	Required?	Definition
IndividualLicenseMiddleName	VARCHAR2	25	No	The middle name of the individual licensee on the appointment transaction request. Included only with an appointment with a **Status** of 'IN." Field reference: • Producer Manager: The **Term Date** field in the Appointments section of the producer record • Database: APPT_RQST.INDV_MNAME
IndividualLicenseSuffixName	VARCHAR2	155	No	The name suffix of the individual licensee on the appointment transaction request. Field reference: • Producer Manager: None • Database: APPT_RQST.INDV_SUF_NAME
FirstBusinessDate	DATE	10	No	Date of first business supported by appointment request. **Note**: A producer's appointment request data in Producer Manager does not contain first business date information. Field reference: • Producer Manager: None • Database: APPT_RQST.FRST_BUS_DTE
BIProcessing	VARCHAR2	10	No	If the transaction request is tied to a background investigation (BI), the processing status code of the request based on its relationship to the BI. Valid values: • BIONHOLD: Transaction request is on hold pending staff review of

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Element	Data Type	Max Length	Required?	Definition
				the BI result.
				• BICANCEL: Transaction request was cancelled by staff due to the BI result.
				• BIPROCBI: Background investigation has processed.
				• BIPN: Transaction request is on hold pending the result of the BI.
				• ERR: Error
				Note: A value of ERR indicates a problem with the background investigation request, not the appointment request. However, an appointment request transaction will not be submitted if there is a problem with its related BI request. For more information, see Appointment Requests and Related Appointment Requests in the Producer Manager online help.
				Field reference:
				• Producer Manager: The **Processing Status** field in the Related Appointment Requests section of the Background Investigations page.
				• Database: APPT_RQST.BI_PROC_CD (APPT_BI_PROC_CD)
BIInstruction	VARCHAR2	10	No	If the transaction request is tied to a background investigation (BI), the processing instruction code of the request based on its relationship to the BI.
				Valid values:
				• AUTO: Request a background investigation and submit the transaction request only if the BI result is "Pass."
				• IMMED: Request a background investigation and submit the transaction request immediately.
				• RVW: Request a background investigation and hold the transaction request for staff review of the BI results.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **BI Processing Instruction** field in the Related Appointment Requests section of the Background Investigations page. • Database: APPT_RQST.BI_INSTR_CD (BI_INSTR_CD)
CostCenterName	VARCHAR2	20	No	The accounting category to which the transaction fees for the request were allocated. Field reference: • Producer Manager: A user or system process may assign cost center information in the **State Cost Center** or **Cost Center** fields at the time the transaction is submitted through either Producer Manager or Producer Express. • Database: APPT_RQST.COST_CNTR_NAME
LicenseCategory	VARCHAR2	10	No	A state-specific license category code included in the transaction request for states that require license category information. Valid values: • 001: Local • 002: Special • 003: Travel Baggage • 004: Special **Note**: Currently only South Carolina requires license category code to be submitted with certain appointment requests. For more information, see the **Notes** section of the Add Appointments page in the Producer Manager online help.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: A user or system process may assign license category information in the **License Category** or **State License Category** fields at the time the transaction is submitted through either Producer Manager or Producer Express. • Database: APPT_RQST.SYS_LIC_CAT_CD (APPTPROC_IL_LIC_CAT_CD or APPTPROC_AG_LIC_CAT_CD)
Counties (Individual appointments only)	VARCHAR2	10	No	County transaction requests related to transaction requests to states that require county-level appointments. County request information related to a state request may display in separate instances of the **County** child element. Content is restricted to a set of enumerated values in the CountyCodeEnumType element. The Producer Manager county code is expressed in the **Code** attribute. The element value is the county name. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. **Note**: Currently only Florida requires county appointments for certain entity and appointment types. For more information, see the **Notes** and **Tips** sections of the Add Appointments page in the Producer Manager online help. Field reference: • Producer Manager: None • Database: IL_APPT_CNTY_APPT_RQST

TrackingIdentifiers

Customer-supplied tracking information for appointment or appointment termination transactions initiated through Sircon Producer Express by a call to the **Producer Management Web Service** is contained in the **TrackingIdentifiers** element, nested within a specific instance of the Appointments element.

If tracking information is triggered to be included in the export, each separate instance of the TrackingID child element may contain information about one of a producer's appointment transaction tracking identifiers.

Note: **TrackingIdentifiers** will include data only if your company also subscribes to Sircon Producer Express and is configured to initiate appointment requests through the **Producer Management Web Service**. Otherwise an empty element is exported.

TrackingID

The **TrackingID** element contains data pertaining to a single tracking identifier of an individual or firm producer appointment or appointment termination transaction.

Element	Data Type	Max Length	Required?	Definition
TrackingID	VARCHAR2	100	No	A customer-supplied tracking code or identifier submitted with a Producer Express transaction request related to the producer appointment. It is intended to tie together initial and subsequent appointment transactions to states that do not appoint based on specific license lines of authority. It allows a customer to identify data in the OBDF export file that originated with a specific appointment or appoinment termination transaction in a Producer Express request.
				Note: An appointment will include a **TrackingID** only when its related Producer Express transaction request has a status of Processed. For more information, see Transactions.
				Field reference: • Producer Manager: The Custom Tracking ID field in the Transaction History data section of a record in Producer Manager • Database: PRDCR_RQST.TRACKING_ID

Agreements

Agreements for each individual or firm producer included in an OBDF export is contained in the Agreements element.

If agreement data is triggered to be included in the export, each separate instance of the Agreement child element may contain information about one of a producer's active or inactive agreements.

Note: Agreements can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks required agreement information, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.

Agreement

The **Agreement** element contains data pertaining to a single contract agreement that an individual or a firm producer has with an underwriting company.

The **Agreement** element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the producer's agreement in Producer Manager. Field reference: • Producer Manager: None • Database: AGRMT.AGRMT_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the agreement to be included in the OBDF export.

Attribute	Data Type	Max Length	Required?	Definition
				Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Agreement content is expressed in the following child elements:

- InsertUserID

- InsertDateTime

- UpdateUserID

- UpdateDateTime

- Type

- Status

- LevelID

- ManagerLevelID

- ExternalSystemType

- ExternalID

- BeginDate

- EndDate

- TerminationReason

- BUShortName

- ParentAgreementID

- [PaymentFrequency](#)

- [ConductBusinessViaDtcc](#)

- [AdvanceCommission](#)

- [PercentOfAdvance](#)

- [MaximumAdvanceAmount](#)

- [AdvanceTransactionStatus](#)

- [StatementDistributionId](#)

- [HierarchyTemplate](#)

- [Companies](#)

- [Products](#)

- [AdditionalProducers](#)

- [AgreementChanges](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the agreement to the producer record. Field reference: • Producer Manager: None • Database: AGRMT.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the agreement was added to the producer record. Field reference: • Producer Manager: None • Database: AGRMT.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the

Element	Data Type	Max Length	Required?	Definition
				agreement on the producer record. Field reference: - Producer Manager: None - Database: AGRMT.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the agreement on the producer record was last modified. Field reference: - Producer Manager: None - Database: AGRMT.ROW_TMSP
Type	VARCHAR2	10	Yes	The type of agreement the producer has with an underwriting company. The Producer Manager agreement type code is expressed in the **Code** attribute. The element value is the agreement description. Valid values are restricted to those that are configured in the AGRMT_TYPE_CD code domain on the Maintain Codes page in Producer Manager. The Producer Manager agreement type code is expressed in the **Code** attribute. The element value is the agreement type description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: Producer Manager: The **Type** field in the Agreements data section of a producer record

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Element	Data Type	Max Length	Required?	Definition
				• Database: AGRMT.TYPE_CD (AGRMT_TYPE_CD)
Status	VARCHAR2	2	Yes	The current status of the agreement. Valid values: • AC: Active • IN: Inactive Field reference: • Producer Manager: The **Status** field in the Agreements data section of a producer record • Database: AGRMT.STS_CD (STS_CD)
LevelID	VARCHAR2	30	No	The producer's level ID in the agreement. Field reference: • Producer Manager: The **Level ID** field in the Agreements data section of a producer record • Database: AGRMT.LVL_ID
ManagerLevelID	VARCHAR2	30	No	The level ID of the producer's manager in the producer's agreement. Field reference: • Producer Manager: None • Database: AGRMT.MGR_LVL_ID
ExternalSystemType	VARCHAR2	10	No	The external system associated with the producer's agreement information. Valid values are restricted to those that are configured in the INTRFC_TYPE_CD code domain on the Maintain Codes page in Producer Manager. The Producer Manager external system type code is expressed in the **Code**

Element	Data Type	Max Length	Required?	Definition
				attribute. The element value is the external system type description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **External System ID** field in the Agreements data section of a producer record • Database: INDV_INTRFC.INTRFC_TYPE_CD (INTRFC_TYPE_CD) or ORG_INTRFC.INTRFC_TYPE_CD (INTRFC_TYPE_CD)
ExternalID	VARCHAR2	50	No	The identifier in the external system that is associated with the producer's agreement information. Field reference: • Producer Manager: The **External System ID** field in the Agreements data section of a producer record • Database: INDV_INTRFC.INTRFC_INDV_ID or ORG_INTRFC.INTRFC_ORG_ID
BeginDate	DATE	10	Yes	The date on which the agreement became active. Field reference: • Producer Manager: The **Begin Date** field in the Agreements data section of a producer record • Database: AGRMT.BEG_DTE
EndDate	DATE	10	No	The date on which the agreement became inactive. Field reference:

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Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: The **End Date** field in the Agreements data section of a producer record • Database: AGRMT.END_DTE
TerminationReason	VARCHAR2	10	No	The reason for the inactivation of the agreement. The Producer Manager agreement termination reason code is expressed in the **Code** attribute. The element value is the termination reason description. Valid values are restricted to those that are configured in the AGRMT_TRMN_RSN_CD code domain on the Maintain Codes page in Producer Manager. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Termination Reason** field in the Agreements data section of a producer record • Database: AGRMT.TRMN_RSN_CD (AGRMT_TRMN_RSN_CD)
BUShortName	VARCHAR2	10	No	The short name code of the business unit associated with the producer's agreement information. **Note**: For more information about business units, see BusinessUnits. Field reference: • Producer Manager: The **Business Unit** field in the Agreements data

Element	Data Type	Max Length	Required?	Definition
				section of a producer record • Database: BU.SHRT_NAME
ParentAgreementID	NUMBER	9	No	The unique, system-assigned identifier of the producer's upline agreement in Producer Manager, if the producer has been assigned a parent producer in an agreement hierarchy. Field reference: • Producer Manager: None • Database: AGRMT.PARENT_AGMT_ID
PaymentFrequency	VARCHAR2	10	No	The timing of commission payments to the producer under the agreement. The Producer Manager payment frequency code is expressed in the **Code** attribute. The element value is the payment frequency description. Valid values are restricted to those that are configured in the PAYMENT_FREQUENCY_CD code domain on the Maintain Codes page in Producer Manager. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Payment Frequency** field in the Agreements data section of a producer record • Database: AGRMT.PAYMENT_FREQUENCY_CD (PAYMENT_FREQUENCY_CD)
ConductBusinessViaDtcc	VARCHAR2	10	No	Indicates whether payments and policy information should be sent to the

Element	Data Type	Max Length	Required?	Definition
				producer using an interface with the Depository Trust & Clearing Corporation.
				The Producer Manager conduct business via DTCC code is expressed in the **Code** attribute. The element value is the data description.
				Valid values are restricted to those that are configured in the BUSINESS_VIA_DTCC_CD code domain on the Maintain Codes page in Producer Manager.
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
				Field reference: - Producer Manager: The **Via DTCC** field in the Agreements data section of a producer record - Database: AGRMT.BUSINESS_VIA_DTCC_CD (BUSINESS_VIA_DTCC_CD)
AdvanceCommission	VARCHAR2	10	No	Indicates whether the producer may receive an advance on commission.
				Valid values are restricted to those that are configured in the ADVANCE_COMMISSION_CD code domain on the Maintain Codes page in Producer Manager.
				The Producer Manager advance commission code is expressed in the **Code** attribute. The element value is the advance commission description.
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **Advance Commission** field in the Agreements data section of a producer record • Database: AGRMT.ADVANCE_COMMISSION_CD (ADVANCE_COMMISSION _CD)
PercentOfAdvance	NUMBER (5,2)	5	No	A numeric value between 0.00 and 100.00 that represents the amount of the producer's advance on commission. Field reference: • Producer Manager: The **% of Advance** field in the Agreements data section of a producer record • Database: AGRMT.ADVANCE_PERCENTAGE
MaximumAdvanceAmount	NUMBER (12,2)	12	No	The maximum amount of advance on commission that the producer may receive. Field reference: • Producer Manager: The **Max Advance Amt** field in the Agreements data section of a producer record • Database: AGRMT.ADVANCE_MAX_AMOUNT
AdvanceTransactionStatus	VARCHAR2	10	No	The current status of commission advances to the producer. Valid values are restricted to those that are configured in the ADVANCE_TRANSACTION_STS_CD code domain on the Maintain Codes page in Producer Manager. The Producer Manager agreement advance transaction status code is expressed in the **Code** attribute. The element value is the data description. **Note**: When you are mapping data from the OBDF export file to your

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Element	Data Type	Max Length	Required?	Definition
				company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
				Field reference: • Producer Manager: The **Advance Transaction Sts** field in the Agreements data section of a producer record • Database: AGRMT.ADVANCE_TRANSACTION_STS_CD (ADVANCE_TRANSACTION_STS_CD)
StatementDistributionId	VARCHAR2	50	No	The producer's identifier in an external statement distribution system. Field reference: • Producer Manager: The **Statement Distribution ID** field in the Agreements data section of a producer record • Database: AGRMT.STATEMENT_DISTRIBUTION_ID
HierarchyTemplate				The selected hierarchy template that establishes the ordered reporting level and/or compensation schedule for the producer in the agreement. Refers to specific content in the HierarchyTemplate element.
Companies				The underwriting companies on the agreement. Refers to specific content in the Companies element.
Products				The products related to the agreement. Refers to specific content in the Products element.
AdditionalProducers				Other producers that are party to the agreement. Refers to specific content in the AdditionalProducers element.

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Element	Data Type	Max Length	Required?	Definition
AgreementChanges				The history of changes to the agreement. Refers to specific content in the AgreementChanges element.

HierarchyTemplate

The **HierarchyTemplate** element contains information about the selected hierarchy template that establishes the ordered reporting level and/or compensation schedule in an agreement for each individual or firm producer included in an OBDF export.

The **HierarchyTemplate** element has the following attributes:

- InternalID

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the external system identifier in Producer Manager. Field reference: • Producer Manager: None • Database: HIER_TMPLT.HIER_TMPLT_ID

Hierarchy template content is expressed in the following child elements:

- Name
- BaseRole
- BeginDate
- EndDate
- Description

Element	Data Type	Max Length	Required?	Definition
Name	VARCHAR2	30	Yes	The name of the hierarchy template that governs the agreement. Field reference: • Producer Manager: The **Hierarchy Template** field in the Agreements data section of a producer record. Configured in the **Name** field on the Add Hierarchy Templates page. • Database: HIER_TMPLT.NAME
BaseRole	VARCHAR2	10	Yes	The producer role that serves as the base level in the agreement governed by the hierarchy template. Valid values are restricted to those that are configured in the AGRMT_PRDCR_ROLE_CD code domain on the Maintain Codes page in Producer Manager. Field reference: • Producer Manager: Configured in the **Base Level** field on the Add Hierarchy Templates page. • Database: HIER_TMPLT.BASE_ROLE_CD
BeginDate	DATE	10	Yes	The date on which the hierarchy template became available for use in agreements. Field reference: • Producer Manager: Configured in the **Start Date** field on the Add Hierarchy Templates page. • Database: HIER_TMPLT.START_DTE
EndDate	DATE	10	No	The date on which the hierarchy template became inactive. Field reference: • Producer Manager: Configured in the **End Date** field on the Maintain Hierarchy Templates page. • Database: HIER_TMPLT.END_DTE

Element	Data Type	Max Length	Required?	Definition
Description	VARCHAR2	255	No	The description of the hierarchy template that governs the agreement. Field reference: • Producer Manager: Configured in the **Description** field on the Add Hierarchy Templates page. • Database: HIER_TMPLT.DSCR

Companies

Underwriting company information for each individual or firm producer agreement data included in an OBDF export is contained in the **Companies** element.

If agreement company data is triggered to be included in the export, each separate instance of the Company child element may contain information about one of the companies on the agreement.

Company

The **Company** element contains data pertaining to a single underwriting company on an agreement for an individual or a firm producer.

The **Company** element has the following attributes:

• Action

Attribute	Data Type	Max Length	Required?	Definition
Action	VARCHAR2	10	Yes	The database action that occurred that caused the agreement company information to be included in the OBDF export. Valid values: • Insert • Update • Delete • None

Attribute	Data Type	Max Length	Required?	Definition
				Field reference: - Producer Manager: None - Database: ACTN_CD

Agreement company content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- Name
- NAIC_ID
- Status
- BeginDate
- EndDate

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the agreement company information to the producer record. Field reference: - Producer Manager: None - Database: AGRMT_ORG.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the agreement company information was added to the producer record. Field reference:

Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: None • Database: AGRMT_ORG.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the agreement company information on the producer record. Field reference: • Producer Manager: None • Database: AGRMT_ORG.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the agreement company information on the producer record was last modified. Field reference: • Producer Manager: None • Database: AGRMT_ORG.ROW_TMSP
Name	VARCHAR2	155	Yes	The name of the agreement company. Field reference: • Producer Manager: The **Company** field in the Agreements data section of a producer record • Database: ORG.ORG_NAME
NAIC_ID	NUMBER	5	Yes	The National Association of Insurance Commissioners identifier code of the agreement company. Field reference: • Producer Manager: None, in Agreements. The **NAIC ID** field in the Company Details section of a Company record. • Database: ORG.NAIC_ID

Element	Data Type	Max Length	Required?	Definition
Status	VARCHAR2	2	Yes	The status of the agreement company record in Producer Manager. The Producer Manager status code is expressed in the **Code** attribute. The element value is the status description. Valid values: • AC: Active • IN: Inactive • PN: Pending Field reference: • Producer Manager: The **Status** field in the **Companies** data section of an Agreement record. • Database: AGRMT_ORG.STS_CD (STS_CD)
BeginDate	DATE	10	Yes	The date on which the company became an active party to the agreement. Field reference: • Producer Manager: The **Begin Date** field in the **Companies** data section of an Agreement record. • Database: AGRMT_ORG.BEG_DTE
EndDate	DATE	10	No	The date on which the company's involvement in the agreement ended. Included only for an agreement company with a **Status** of 'IN." Field reference: • Producer Manager: The **End Date** field in the **Companies** data section of an Agreement record. • Database: AGRMT_ORG.END_DTE

Products

Products related to agreements in Producer Manager (AGRMT_PROD table) is deprecated functionality. The **Products** child element of the Agreements parent element will always be empty in an OBDF export file.

AdditionalProducers

Information about additional producers who may be party to an agreement for each individual or firm producer included in an OBDF export is contained in the **AdditionalProducers** element.

If additional producers data is triggered to be included in the export, each separate instance of the AdditionalProducer child element may contain information about one of the additional producers on the agreement.

AdditionalProducer

The **AdditionalProducer** element contains data pertaining to a single additional party on an agreement for an individual or a firm producer.

The **AdditionalProducer** element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the agreement additional producer information in Producer Manager. Field reference: • Producer Manager: None • Database: AGRMT_ADDTL_PRDCR.AGRMT_ADDTL_PRDCR_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the agreement additional producer information to be included in the OBDF export. Valid values:

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Attribute	Data Type	Max Length	Required?	Definition
				• Insert
				• Update
				• Delete
				• None
				Field reference:
				• Producer Manager: None
				• Database: ACTN_CD

Additional Producer content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- Type
- Role
- TIN
- Name
- FirstName
- MiddleName
- ExternalSystemType
- ExternalId
- BeginDate
- EndDate

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the additional producer information to the producer record. Field reference: • Producer Manager: The **Created By** field in the **Licenses** sub-section of the Licenses/Qualifications section of the producer record • Database: AGRMT_ADDTL_PRDCR.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the additional producer information was added to the producer record. Field reference: • Producer Manager: The **Created On** field in the **Licenses** sub-section the Licenses/Qualifications section of the producer record • Database: AGRMT_ADDTL_PRDCR.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the additional producer information on the producer record. Field reference: • Producer Manager: The **Updated By** field in the **Licenses** sub-section the Licenses/Qualifications section of the producer record • Database: AGRMT_ADDTL_PRDCR.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the additional producer information on the producer record was last modified. Field reference: • Producer Manager: The **Updated On** field in the **Licenses** sub-section the Licenses/Qualifications section of the producer record • Database: AGRMT_ADDTL_PRDCR.ROW_TMSP

Element	Data Type	Max Length	Required?	Definition
Type	VARCHAR2	10	Yes	The entity type of the additional producer on the agreement. Valid values: • IL: Individual licensee • AGY: Firm Field reference: • Producer Manager: The **Primary Producer Type** field in the **Add/Update Additional Producer** data section of the Maintain Additional Producers page. • Database: AGRMT_ADDTL_PRDCR.PRDCR_TYPE_CD
Role	VARCHAR2	10	Yes	The additional producer's role in the agreement. Valid values are restricted to those that are configured in the AGRMT_PRDCR_ROLE_CD code domain on the Maintain Codes page in Producer Manager. The Producer Manager role code is expressed in the **Code** attribute. The element value is the role description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Role** field in the **Additional Producers** sub-section of the Agreements data section of a producer record • Database: AGRMT_ADDTL_PRDCR.ROLE_CD
TIN	NUMBER	11	No	The taxpayer identification number of the additional producer on the agreement.

Element	Data Type	Max Length	Required?	Definition
				Note: The **TIN** element can be globally omitted altogether from individual producer data exported through the OBDF, if the XML_EXPORT_INCL_SSN business rule is Vertafore-configured to "N (No)". For more information, please see Configuration Options in the Producer Manager online help or consult your Vertafore representative. Field reference: • Producer Manager: The **EIN/SSN** field in the **Additional Producers** sub-section of the Agreements data section of a producer record • Database: AGRMT_ADDTL_PRDCR.PRDCR_ID (INDV.SSN or ORG.EIN)
Name	VARCHAR2	155	Yes	The business name of a firm additional producer, or the last name of an individual licensee additional producer. Field reference: • Producer Manager: The **Name** field in the **Additional Producers** sub-section of the Agreements data section of a producer record • Database: ORG.ORG_NAME or INDV.LNAME
FirstName	VARCHAR2	25	Yes	The first name of an individual licensee additional producer. Included only for an additional producer with a **Type** of 'IL." Field reference: • Producer Manager: The **Name** field in the **Additional Producers** sub-section of the Agreements data section of a producer record • Database: INDV.FNAME
MiddleName	VARCHAR2	25	Yes	The middle name of an individual licensee additional producer. Included only for an additional producer with a **Type** of 'IL."

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **Name** field in the **Additional Producers** sub-section of the Agreements data section of a producer record • Database: INDV.MNAME
ExternalSystemType	VARCHAR2	10	No	The external system associated with the additional producer agreement information. Valid values are restricted to those that are configured in the INTRFC_TYPE_CD code domain on the Maintain Codes page in Producer Manager. The Producer Manager external system type code is expressed in the **Code** attribute. The element value is the external system type description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **External System ID** field in the **Additional Producers** sub-section of the Agreements data section of a producer • Database: AGRMT_ADDTL_PRDCR.INTRFC_ID (INDV_INTRFC.INTRFC_TYPE_CD (INTRFC_TYPE_CD) or ORG_INTRFC.INTRFC_TYPE_CD (INTRFC_TYPE_CD))
ExternalId	VARCHAR2	50	No	The identifier in the external system that is associated with the additional producer agreement information. Field reference: • Producer Manager: The **External System ID** field in the **Additional Producers** sub-section of the Agreements data section of a producer • Database: INDV_INTRFC.INTRFC_INDV_ID or ORG_INTRFC.INTRFC_ORG_ID

Element	Data Type	Max Length	Required?	Definition
BeginDate	DATE	10	Yes	The date on which the additional producer was added to the agreement. Field reference: • Producer Manager: The **Begin Date** field in the **Additional Producers** sub-section of the Agreements data section of a producer • Database: AGRMT_ADDTL_PRDCR.BEG_DTE
EndDate	DATE	10	No	The date on which the additional producer became inactive on the agreement . Field reference: • Producer Manager: The **Begin Date** field in the **Additional Producers** sub-section of the Agreements data section of a producer • Database: AGRMT_ADDTL_PRDCR.END_DTE

AgreementChanges

The history of changes to a parent agreement or upline for each individual or firm producer included in an OBDF export is contained in the **AgreementChanges** element.

If agreement changes data is triggered to be included in the export, each separate instance of the AgreementChange child element may contain information about one change in a producer's agreement upline.

AgreementChange

The **AgreementChange** element has the following attributes:

• InternalID

• Action

Attribute	Data Type	Max Length	Required?	Definition

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the agreement change in Producer Manager. Field reference: • Producer Manager: None • Database: AGRMT_CHANGE.AGRMT_CHANGE_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the agreement change to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Agreement changes content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- EffectiveDate
- Type
- HierarchyTemplate
- ParentAgreementID

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the agreement change to the producer record. Field reference: • Producer Manager: None • Database: AGRMT_CHANGE .ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the agreement change was added to the producer record. Field reference: • Producer Manager: None • Database: AGRMT_CHANGE .ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the agreement change information on the producer record. Field reference: • Producer Manager: None • Database: AGRMT_CHANGE .ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the agreement change information on the producer record was last modified. Field reference: • Producer Manager: None • Database: AGRMT_CHANGE .ROW_TMSP
EffectiveDate	DATE	10	Yes	The date on which the change to the producer's upline became effective.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **View Hierarchy as of** field on the View Agreement Hierarchy History page • Database: AGRMT_CHANGE.EFF_DTE
Type	VARCHAR2	10	Yes	The type of agreement the producer has with an underwriting company that changed. The Producer Manager agreement type code is expressed in the **Code** attribute. The element value is the agreement description. Valid values are restricted to those that are configured in the AGRMT_TYPE_CD code domain on the Maintain Codes page in Producer Manager. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **View Hierarchy as of** field on the View Agreement Hierarchy History page • Database: AGRMT_CHANGE.AGRMT_TYPE_CD
HierarchyTemplate				The selected hierarchy template that establishes the ordered reporting level and/or compensation schedule for the producer in the changed agreement. Refers to specific content in the HierarchyTemplate

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Element	Data Type	Max Length	Required?	Definition
				element.
ParentAgreementID	NUMBER	9	No	The unique, system-assigned identifier of the producer's changed upline agreement in Producer Manager. Field reference: • Producer Manager: None • Database: AGRMT_CHANGE.PARENT_AGRMT_ID

Applications

License application information for each individual or firm producer included in an OBDF export is contained in the Applications element.

License application data may be added to a producer record either systematically through a state response to an electronically submitted license application or by manual data entry.

If license application data is triggered to be included in the export, each separate instance of the Application child element may contain information about one of a producer's license applications.

Application

The Application element contains data pertaining to a single license application for an individual or a firm producer.

The Application element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the license application in Producer Manager.

Attribute	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: None • Database: PRDCR_APPL.PRDCR_APPL_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the license application to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

License application content is expressed in the following child elements:

- InsertUserID

- InsertDateTime

- UpdateUserID

- UpdateDateTime

- RecordedDate

- Status

- StatusDate

- State

- LicenseType

- LicenseNumber

- [LicenseEffectiveDate](#)

- [Location](#)

- [LocationDate](#)

- [PreviouslyLicensedIndicator](#)

- [BIInstruction](#)

- [Qualifications](#)

- [Appointments](#)

- [Associations](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the license application to the producer record. Field reference: • Producer Manager: None • Database: PRDCR_APPL.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the license application was added to the producer record. Field reference: • Producer Manager: None • Database: PRDCR_APPL.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the license application information on the producer record. Field reference: • Producer Manager: None

Element	Data Type	Max Length	Required?	Definition
				• Database: PRDCR_APPL.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the license application information on the producer record was last modified. Field reference: • Producer Manager: None • Database: PRDCR_APPL.ROW_TMSP
RecordedDate	DATE	10	Yes	The date on which the **Status** of the license application was recorded or updated manually in Producer Manager. **Note**: **RecordedDate** will include a value only for a license application that was manually recorded or updated in Producer Manager. License application data included in an OBDF export file usually pertains to electronically submitted license applications. Field reference: • Producer Manager: The **Status Date** field in the License Applications data section of the producer record **Note**: The **Status Date** field in Producer Manager also may refer to the date that the status of an electronically submitted license application was updated based on a state response.

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Element	Data Type	Max Length	Required?	Definition
				• Database: PRDCR_APPL.RECD_DTE
Status	VARCHAR2	10	Yes	The current status of the license application in Producer Manager.
				Valid values may include the following:
				• AADN: Auto Approval Denied
				• AP: Approved
				• APMA: Approved Pending Manual Action
				• APRV: Approved Pending Exam
				• DN: Denied
				• EE: Entered in Error
				• ERR: Error
				• PS: Pending - State Approval
				• PN: Pending Submission to State
				• PROC: Processed
				• SSCRBRVW: Under Carrier Review
				• SR: Under State Review
				• WD: Withdrawn
				Field reference:
				• Producer Manager: The **Status** field in the License Applications data section of the producer record
				• Database: PRDCR_APPL.STS_CD (APPL_STS_CD)
				The Producer Manager status code is expressed in the **Code** attribute. The element value is the status

Element	Data Type	Max Length	Required?	Definition
				description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
StatusDate	DATE	10	Yes	The date on which the current value of the **Status** element became effective. Field reference: • Producer Manager: The **Status Date** field in the License Applications data section of the producer record • Database: PRDCR_APPL.STS_DTE
State	VARCHAR2	10	Yes	A code representing the regulatory jurisdiction to which the license application was submitted or for which it was recorded. Content is restricted to a set of enumerated values in the ApplicationStateCodeEnumType element. Field reference: • Producer Manager: The **State** field in the License Applications data section of the producer record • Database: PRDCR_APPL.ST_CD
LicenseType	VARCHAR2	10	Yes	The state-specific license class that was applied for. The Producer Manager license type code is expressed in the **Code** attribute. The element value

Element	Data Type	Max Length	Required?	Definition
				is the license description.
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
				Field reference: • Producer Manager: The **License Type** field in the License Applications data section of the producer record • Database: PRDCR_APPL.SYS_LIC_TYPE_CD (SYS_AGY_LIC_TYPE_CD or SYS_IL_LIC_TYPE_CD
				Note: Vertafore maintains a complete list of currently supported license codes by state. To support frequent state changes, Vertafore notifies customers via email of new and historical codes. Please contact your Vertafore representative for more information.
LicenseNumber	VARCHAR2	15	No	The state license number returned by a state for an electronically submitted license application with an approved response. Or, for a manually recorded license application, the recorded state license number. Field reference: • Producer Manager: The **License Number**

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Element	Data Type	Max Length	Required?	Definition
				field in the **License Applications** section of the Maintain License Applications page • Database: PRDCR_APPL.LIC_NBR
LicenseEffectiveDate	DATE	10	No	The date on which a state issued an approved response to an electronically submitted license application. **Note**: **LicenseEffectiveDate** will always be empty for a manually recorded license application. Field reference: • Producer Manager: None • Database: PRDCR_APPL.EFF_DTE
Location				A license application location is deprecated functionality in Producer Manager. The **Location** child element of the Application parent element will always be empty in an OBDF export file.
LocationDate				A license application location date is deprecated functionality in Producer Manager. The **LocationDate** child element of the Application parent element will always be empty in an OBDF export file.
PreviouslyLicensedIndicator	VARCHAR2	1	Yes	For a license application that was submitted electronically to a state, indicates that the submitter indicated on the electronic application whether the applicant previously held the license in the state.

Element	Data Type	Max Length	Required?	Definition
				Or, indicates that the applicant was recorded as having held the license in the state. Valid values: • Y: The applicant previously held the license in the state • N: The applicant did not previously hold the license in the state Field reference: • Producer Manager: The **Already Licensed** field in the **License Applications** section of the Maintain License Applications page • Database: PRDCR_APPL.PREV_LIC_IND
BIInstruction				A background investigation tied to a license application is deprecated functionality in Producer Manager. The **BIInstruction** child element of the Application parent element will always be empty in an OBDF export file.
Qualifications				The active or inactive qualifications (a.k.a., license lines, lines of authority, or LOA) related to the license. Refers to specific content in the Qualifications element.
Appointments				An appointment tied to a license application is deprecated functionality in Producer Manager. The **Appointments** child element of the Application parent element will always be empty in an OBDF export file.

Element	Data Type	Max Length	Required?	Definition
Associations				An association tied to a license application is deprecated functionality in Producer Manager. The **Associations** child element of the Application parent element will always be empty in an OBDF export file.

Qualifications (ApplicationQualifications)

Qualifications (a.k.a., line of authority or LOA) data for each individual or firm producer license application included in an OBDF export is contained in the Qualifications element, nested within a specific instance of the Application element.

If qualification data is triggered to be included with Applications data in the export, each separate instance of the Qualification child element may contain information about one qualification that is related to the producer's license application.

Qualification

The Qualification element contains data pertaining to a single qualification (line of authority or LOA) related to an individual or a firm producer's license application.

The Qualification element has the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the license application qualification in Producer Manager. Field reference: • Producer Manager: None • Database: PRDCR_APPL_QUAL.PRDCR_APPL_QUAL_ID

Attribute	Data Type	Max Length	Required?	Definition
Action	VARCHAR2	10	Yes	The database action that occurred that caused the license application qualification to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Qualification content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- Type
- Status
- StatusDate

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the license application qualification to the individual producer record. Field reference:

Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: None • Database: PRDCR_APPL_QUAL.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the license application qualification was added to the individual producer record. Field reference: • Producer Manager: None • Database: PRDCR_APPL_QUAL.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the license application qualification information on the individual producer record. Field reference: • Producer Manager: None • Database: PRDCR_APPL_QUAL.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the license application qualification information on the individual producer record was last modified. Field reference: • Producer Manager: None • Database: PRDCR_APPL_QUAL.ROW_TMSP
Type	VARCHAR2	10	Yes	The state-specific qualification that was applied for. The Producer Manager qualification code is expressed in the **Code** attribute. The element value is the qualification description. Field reference: • Producer Manager: The **Qualification Type** field in the **Application Qualifications** section of the Maintain License Applications page

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Element	Data Type	Max Length	Required?	Definition
				• Database: PRDCR_APPL_QUAL.SYS_QUAL_CD (SYS_QUAL_CD) **Note**: Vertafore maintains a complete list of currently supported qualification codes by state. To support frequent state changes, Vertafore notifies customers via email of new and historical codes. Please contact your Vertafore representative for more information. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
Status	VARCHAR2	10	Yes	The current status of the qualification application in Producer Manager. Valid values may include the following: • AADN: Auto Approval Denied • AP: Approved • APMA: Approved Pending Manual Action • APRV: Approved Pending Exam • DN: Denied • EE: Entered in Error • ERR: Error • PS: Pending - State Approval • PN: Pending Submission to State • PROC: Processed • SSCRBRVW: Under Carrier Review • SR: Under State Review • WD: Withdrawn

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **Status** field in the **Application Qualifications** section of the Maintain License Applications page • Database: PRDCR_APPL_QUAL.QUAL_STS_CD (APPL_QUAL_STS_CD) The Producer Manager status code is expressed in the **Code** attribute. The element value is the address type description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. **Note**: Special conditional logic applies to state responses to qualification applications as they relate to their parent license applications. Please refer to Maintain License Applications in the Producer Manager online help for more information.
StatusDate	DATE	10	Yes	The date on which the current value of the **Status** element became effective. Or, the date on which the **Status** of the license application qualification was recorded or updated manually in Producer Manager. Field reference: • Producer Manager: The **Status Date** field in the **Application Qualifications** section of the Maintain License Applications page • Database: PRDCR_APPL_QUAL.QUAL_STS_DTE

BusinessUnits

Business unit data for each individual or firm producer included in an OBDF export is contained in the **BusinessUnits** element.

If business unit data is triggered to be included in the export, each separate instance of the BusinessUnit child element may contain information about one of a producer's business units.

Note: Business units can be Vertafore-configured to be required, based on your company's business requirements. If a producer record lacks required busines unit information, the record may be considered to be deficient of required information. A producer record deficient of required information is considered "incomplete," and appointment or termination requests may not be submitted for the producer until the deficiency is corrected. "Incomplete" producer records also may be configured to be excluded from an OBDF export file. For more information, see Configuration Options and Producers With Missing Information in the Producer Manager online help, or consult your Vertafore representative.

BusinessUnit

The **BusinessUnit** element contains data pertaining to a single business unit assignment of an individual or a firm producer.

The **BusinessUnit** element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the business unit in Producer Manager. Field reference: • Producer Manager: None • Database: IL_BU.BU_ID or AGY_BU.BU_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the business unit to be included in the OBDF export. Valid values: • Insert • Update

Attribute	Data Type	Max Length	Required?	Definition
				• Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Business unit content is expressed in the following child elements:

- InsertUserID

- InsertDateTime

- UpdateUserID

- UpdateDateTime

- BUName

- BUShortName

- Status

- BeginDate

- EndDate

- BusinessSegment

- ServicingLocation

- DistributionChannel

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the business unit to the producer record. Field reference:

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Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: None
				• Database: IL_BU.ROW_INS_UID or AGY_BU.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the business unit was added to the producer record.
				Field reference:
				• Producer Manager: None
				• Database: IL_BU.ROW_INS_TMSP or AGY_BU.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the business unit information on the producer record.
				Field reference:
				• Producer Manager: None
				• Database: IL_BU.ROW_UID or AGY_BU.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the business unit information on the producer record was last modified.
				Field reference:
				• Producer Manager: None
				• Database: IL_BU.ROW_TMSP or AGY_BU.ROW_TMSP
BUName	VARCHAR2	72	No	The business unit long name.
				Valid values are restricted to business unit long names (codes) that are user-configured in the **BU Name** field on the Maintain Business Unit page in Producer Manager.
				Warning: The value expressed is the business unit long name, as configured by a system administrator on the Maintain Business Unit page in Producer Manager. It is not the business unit short name, which displays to users in the **BU Name** field in the Business Units data section of a producer record in Producer Manager and elsewhere in Producer Manager and

Element	Data Type	Max Length	Required?	Definition
				Producer Express.
				Field reference:
				• Producer Manager: The **BU Name** field on the Maintain Business Unit page
				• Database: IL_BU.BU_NAME or AGY_BU.BU_NAME
BUShortName	VARCHAR2	10	Yes	The business unit short name.
				Valid values are restricted to business unit short names (codes) that are user-configured in the **Short Name** field on the Maintain Business Unit page in Producer Manager.
				Note: Because business unit short name codes are much more prevalent throughout Producer Manager and Producer Express, we recommend mapping **BUShortName** codes to the equivalent codes in your company's internal systems, rather than **BUName** codes.
				Field reference:
				• Producer Manager: The **BU Name** field in the Business Units data section of a producer record
				• Database: IL_BU.SHRT_NAME or AGY_BU.SHRT_NAME
Status	VARCHAR2	10	No	The status of the producer's assignment to the business unit.
				The Producer Manager status code is expressed in the **Code** attribute. The element value is the status description.
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.

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Element	Data Type	Max Length	Required?	Definition
				Valid values: • AC: Active • IN: Inactive Field reference: • Producer Manager: The **Status** field in the Business Units data section of a producer record • Database: IL_BU.STS_CD or AGY_BU.STS_CD
BeginDate	DATE	10	Yes	The date on which the producer's **Status** with the business unit most recently became Active. Field reference: • Producer Manager: The **Begin Date** field in the Business Units data section of a producer record • Database: IL_BU.BEG_DTE or AGY_BU.BEG_DTE
EndDate	DATE	10	No	The date on which the producer's **Status** with the business unit most recently became Inactive. Included only for a business unit with a **Status** of 'IN." Field reference: • Producer Manager: The **End Date** field in the Business Units data section of a producer record • Database: IL_BU.END_DTE or AGY_BU.END_DTE
BusinessSegment	VARCHAR2	10	No	The business unit's selected business segment sub-code. Valid values are restricted to codes that are configured per business unit in the **Business Segment** field on the Maintain Business Unit page in Producer Manager. **Note**: Valid codes must be created in the BU_BUSINESS_SEGMENT_CD code domain on

Element	Data Type	Max Length	Required?	Definition
				the Maintain Codes page in Producer Manager. Field reference: • Producer Manager: The **Business Segment** field in the Business Units data section of a producer record • Database: IL_BU.BUSINESS_SEGMENT (BU_BUSINESS_SEGMENT_CD) or AGY_BU.BUSINESS_SEGMENT (BU_BUSINESS_SEGMENT_CD)
ServicingLocation	VARCHAR2	10	No	The business unit's selected servicing location sub-code. Valid values are restricted to codes that are configured per business unit in the **Servicing Location** field on the Maintain Business Unit page in Producer Manager. **Note**: Valid codes must be created in the BU_SERVICING_LOCATION_CD code domain the Maintain Codes page in Producer Manager. Field reference: • Producer Manager: The **Servicing Location** field in the Business Units data section of a producer record • Database: IL_BU.SERVICING_LOCATION (BU_SERVICING_LOCATION_CD) or AGY_BU.SERVICING_LOCATION (BU_SERVICING_LOCATION_CD)
DistributionChannel	VARCHAR2	10	No	The business unit's selected distribution channel sub-code. Valid values are restricted to codes that are configured per business unit in the **Distribution Channel** field on the Maintain Business Unit page in Producer Manager. **Note**: Valid codes must be created in the BU_DISTRIBUTION_CHANNEL_CD code domain

Element	Data Type	Max Length	Required?	Definition
				on the Maintain Codes page Producer Manager in Producer Manager. Field reference: • Producer Manager: The **Distribution Channel** field in the Business Units data section of a producer record • Database: IL_BU.DISTRIBUTION_CHANNEL (BU_DISTRIBUTION_CHANNEL_CD) or AGY_BU.DISTRIBUTION_CHANNEL (BU_DISTRIBUTION_CHANNEL_CD)

ProductCertifications

Product certifications data for each individual or firm producer included in an OBDF export is contained in the **ProductCertifications** element.

If product certification data is triggered to be included in the export, each separate instance of the ProductCertification child element may contain information about one of a producer's product certifications.

ProductCertification

The **ProductCertification** element contains data pertaining to a single product certification of an individual or a firm producer.

The **ProductCertification** element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the product certification in Producer Manager.

Attribute	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: None • Database: IL_PROD_CERT.IL_PROD_CERT_ID or AGY_PROD_CERT.AGY_PROD_CERT_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the product certification to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Product certification content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- Type
- CertificationDate

Element	Data Type	Max Length	Required?	Definition

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the product certification to the producer record. Field reference: • Producer Manager: None • Database: IL_PROD_CERT.ROW_INS_UID or AGY_PROD_CERT.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the product certification was added to the producer record. Field reference: • Producer Manager: None • Database: IL_PROD_CERT.ROW_INS_TMSP or AGY_PROD_CERT.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the product certification information on the producer record. Field reference: • Producer Manager: None • Database: IL_PROD_CERT.ROW_UID or AGY_PROD_CERT.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the product certification information on the producer record was last modified. Field reference: • Producer Manager: None • Database: IL_PROD_CERT.ROW_TMSP or AGY_PROD_CERT.ROW_TMSP
Type	VARCHAR2	10	Yes	The type of product the selected producer is certified to represent. Valid values are restricted to those that are configured in the PROD_CERT_TYPE_CD code domain on the Maintain Codes page in Producer Manager.

Element	Data Type	Max Length	Required?	Definition
				The Producer Manager product type code is expressed in the **Code** attribute. The element value is the status description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Product Type** field in the Product Certifications data section of a producer record • Database: IL_PROD_CERT.TYPE_CD (PROD_CERT_TYPE_CD) or AGY_PROD_CERT.TYPE_CD (PROD_CERT_TYPE_CD)
CertificationDate	DATE	10	Yes	The date on which the producer became certified to represent the product type. Field reference: • Producer Manager: The **Certification Date** field in the Product Certifications data section of a producer record • Database: IL_PROD_CERT.CERT_DTE or AGY_PROD_CERT.CERT_DTE

Comments

Comments information for each individual or firm producer included in an OBDF export is contained in the **Comments** element.

If comments information is triggered to be included in the export, each separate instance of the Comment child element may contain one comment.

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Comment

The **Comment** element contains data pertaining to a single comment related to an individual or a firm producer.

The **Comment** element has the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the comment in Producer Manager. Field reference: • Producer Manager: None • Database: INDV_CMT.INDV_CMT_ID or ORG_CMT.ORG_CMT_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the comment to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Comment content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID

- [UpdateDateTime](#)

- [Comment](#)

- [Date](#)

- [LastModifiedDate](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the comment to the producer record. Field reference: - Producer Manager: None - Database: INDV_CMT.ROW_INS_UID or ORG_CMT.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the comment was added to the producer record. Field reference: - Producer Manager: None - Database: INDV_CMT.ROW_INS_TMSP or ORG_CMT.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the comment information on the producer record. Field reference: - Producer Manager: None - Database: INDV_CMT.ROW_UID or ORG_CMT.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the comment information on the producer record was last modified. Field reference: - Producer Manager: None - Database: INDV_CMT.ROW_TMSP or ORG_CMT.ROW_TMSP

Element	Data Type	Max Length	Required?	Definition
Comment	VARCHAR2	1724	Yes	The comment content. Field reference: • Producer Manager: The **Comment** field in the Comments data section of a producer record • Database: INDV_CMT.CMT or ORG_CMT.CMT
Date	DATE	10	Yes	The date on which the comment was saved to the producer record. Field reference: • Producer Manager: The **Date** field in the Comments data section of a producer record • Database: INDV_CMT.DTE or ORG_CMT.DTE
LastModifiedDate	DATE	10	Yes	The date on which the comment was last updated. Field reference: • Producer Manager: The **Last Modified Date** field in the Comments data section of a producer record • Database: INDV_CMT.LAST_MOD_DTE or ORG_CMT.LAST_MOD_DTE

Courses

Information about various education or training course completions and credits for each individual producer included in an OBDF export is contained in the **Courses** element.

If course completion information is triggered to be included in the export, each separate instance of the Course child element may contain information about one of a producer's education class or training courses.

Course

The **Course** element contains data pertaining to a single education class or training course completion of an individual producer.

The **Course** element has the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the course information in Producer Manager. Field reference: • Producer Manager: None • Database: CRS_CMPLT.CRS_CMPLT_ID or IL_CRS.IL_CRS_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the course information to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Course content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID

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- [UpdateDateTime](#)

- [Number](#)

- [CompletionDate](#)

- [Name](#)

- [Hours](#)

- [Category](#)

- [Subcategory](#)

- [RegulatoryBody](#)

- [DocumentReference](#)

- [ProviderName](#)

- [ProviderId](#)

- [ProviderSubscriberId](#)

- [ProviderCourseId](#)

- [Status](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the course information to the producer record. Field reference: - Producer Manager: None - Database: CRS_CMPLT.ROW_INS_UID or IL_CRS.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the course information was added to the producer record. Field reference: - Producer Manager: None

Element	Data Type	Max Length	Required?	Definition
				• Database: CRS_CMPLT.ROW_INS_TMSP or IL_CRS.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the course information on the producer record. Field reference: • Producer Manager: None • Database: CRS_CMPLT.IL_CRS.ROW_UID or IL_CRS.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the course information on the producer record was last modified. Field reference: • Producer Manager: None • Database: CRS_CMPLT.ROW_TMSP or IL_CRS.ROW_TMSP
Number	NUMBER	25	Yes	The Producer Manager-internal identifier of the course. **Note**: For manually entered courses tracked in the Course Completions data section of a producer's record, the value is always "0". Field reference: • Producer Manager: None, or the **Course No.** field in the CE Courses data section of a producer record • Database: IL_CRS.CRS_NBR
CompletionDate	DATE	10	Yes	The date on which the producer completed the education or training course. Field reference: • Producer Manager: The **Completion Date** field in the Course Completions data

Element	Data Type	Max Length	Required?	Definition
				section of a producer record or the **Completion Date** field in the CE Courses data section of a producer record • Database: CRS_CMPLT.CMPLT_DTE or IL_CRS.CRS_CMPT_DTE
Name	VARCHAR2	255	Yes	The name of the education or training course. Field reference: • Producer Manager: The **Course Name** field in the Course Completions data section of a producer record or the **Course Name** field in the CE Courses data section of a producer record • Database: CRS_CMPLT.NAME or IL_CRS.CRS_NAME
Hours	NUMBER (5,2)	5	No	The number of whole and/or partial hours for which the producer will earn or has earned credit for completing the course. Field reference: • Producer Manager: The **Credit Hours** field in the Course Completions data section of a producer record or the **Course Hours** field in the CE Courses data section of a producer record • Database: CRS_CMPLT.HR_QTY or IL_CRS.CRS_HR_QTY
Category	VARCHAR2	10	Yes	The education type or grouping of the training course. Valid values are restricted to those available in the CRS_CTGRY_CD or CRS_CAT_CD code groups on the Maintain Codes page in Producer Manager. The Producer Manager course category code is expressed in the **Code** attribute. The element value is the course category description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.

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Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **Category** field in the Course Completions data section of a producer record or the CE Courses data section of a producer record • Database: CRS_CMPLT.CAT_CD or IL_CRS.CRS_CAT_CD (CRS_CAT_CD)
Subcategory	VARCHAR2	10	No	The sub-type grouping of the course, such as initial or ongoing. Valid values are restricted to those available in the CRS_SUBCTGRY_CD code group on the Maintain Codes page in Producer Manager. The Producer Manager course sub-category code is expressed in the **Code** attribute. The element value is the course sub-category description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Subcategory** field in the Course Completions data section of a producer record • Database: CRS_CMPLT.SUB_CAT_CD
RegulatoryBody	VARCHAR2	10	No	The regulatory or oversight entity that compelled the producer to take and earn credit for the course. Valid values are restricted to those available in the RGLTRY_BDY_CD code group on the Maintain Codes page in Producer Manager. The Producer Manager regulatory body code is expressed in the **Code** attribute. The element value is the regulatory body description. **Note**: When you are mapping data from the OBDF export file to your company's internal

Element	Data Type	Max Length	Required?	Definition
				systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Regulatory Body** field in the Course Completions data section of a producer record • Database: CRS_CMPLT.REG_BODY
DocumentReference	VARCHAR	255	No	An identifier for the documentation certifying that the producer completed the course. May be used to link the course completion to a file in an internal document imaging system. Field reference: • Producer Manager: The **Document Reference** field in the Course Completions data section of a producer record • Database: CRS_CMPLT.DOC_REFERENCE
ProviderName	VARCHAR2	100	Yes	The name of the organization or person that delivered the education or training course. Field reference: • Producer Manager: The **Provider Name** field in the Course Completions data section of a producer record or the **Provider Name** field in the CE Courses data section of a producer record • Database: CRS_CMPLT.PRV_NAME or IL_CRS.PRV_NAME
ProviderId	VARCHAR2	50	No	The unique identifier of the provider of the continuing education course. **Note**: This element is included only when passing CE requirements data. If passing education credential information, the element is omitted. Field reference:

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Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: None, or the **Provider ID** field in the CE Courses data section of a producer record • Database: IL_CRS.PRV_ID
ProviderSubscriberId	NUMBER	9	No	The education provider's Vertafore Sircon subscriber account number. Field reference: • Producer Manager: The **Provider Subscriber ID** field in the Course Completions data section of a producer record • Database: CRS_CMPLT.PRV_SSCRB_ID
ProviderCourseId	VARCHAR2	20	No	The identifier that the education provider has assigned to the course. Field reference: • Producer Manager: The **Provider Course ID** field in the Course Completions data section of a producer record • Database: CRS_CMPLT.PRV_CRS_ID
Status	VARCHAR2	10	Yes	The current fulfillment status of the course. Valid values: • CMPLT: Completed • CNCL: Canceled • STRTD: Started **Note**: Product, business conduct, or other training that is tracked in the Course Completions data section of a producer's record and can factor into a producer's eligibility for an education credential is always assumed to be completed, so **Status** always will be "CMPLT"="Completed".

Element	Data Type	Max Length	Required?	Definition
				The Producer Manager status code is expressed in the **Code** attribute. The element value is the status code description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: None, or the **Status** field in the CE Courses data section of a producer record • Database: IL_CRS.STS_CD

CourseRequirements

Information about the status of education credentials for each individual producer included in an OBDF export is contained in the **CourseRequirements** element.

Note: The **CourseRequirements** node formerly included information about a producer's continuing education (CE) requirements only. When Vertafore Sircon developed the education credentials capability, it was decided to export education credential information through the **CourseRequirements** node, in order to maintain backwards compatibility with customers tracking CE course requirements. The export of the different types of data included in the **CourseRequirements** node was controlled by a customer-specific business rule (ec.credStatus.recordLatest). Now, the business rule is eliminated, and the **CourseRequirements** node should include only education credential status data. However, it still may include CE requirements data, if exported producer records already contain such data. If you have questions, please consult your Vertafore representative.

Warning: Any functional change to a component of an education credential, such as the inactivation or activation of a credential program that supports an education credential or the addition, modification, or deletion of a credential program requirement, will cause all producers in the system to be re-evaluated to determine whether now they are compliant or non-compliant with the education credential. The re-evaluation may

If education credential or CE requirement information is triggered to be included in the export, each separate instance of the CourseRequirement child element may contain information about the status of one of a producer's education credentials.

CourseRequirement

The **CourseRequirement** element contains data pertaining to a single education credential or CE requirement of an individual producer.

The **CourseRequirement** element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the education credential in Producer Manager. Field reference: • Producer Manager: None • Database: IL_CE_RQMT.IL_CE_RQMT_ID or CRED.CRED_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the education credential to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference:

Attribute	Data Type	Max Length	Required?	Definition
				• Producer Manager: None • Database: ACTN_CD

Education credential or CE requirement content is expressed in the following child elements:

- [InsertUserID](#)
- [InsertDateTime](#)
- [UpdateUserID](#)
- [UpdateDateTime](#)
- [Type](#)
- [State](#)
- [AssignedReviewDate](#)
- [RequiredHours](#)
- [AppliedHours](#)
- [Status](#)
- [StatusDate](#)
- [AppliedCourses](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the education credential or CE requirement to the producer record. Field reference: • Producer Manager: None • Database: IL_CE_RQMT.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the education

Element	Data Type	Max Length	Required?	Definition
				credential or CE requirement was added to the producer record. Field reference: - Producer Manager: None - Database: IL_CE_RQMT.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the education credential or CE requirement on the producer record. Field reference: - Producer Manager: None - Database: IL_CE_RQMT.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the education credential or CE requirement on the producer record was last modified. Field reference: - Producer Manager: None - Database: IL_CE_RQMT.ROW_TMSP
Type	VARCHAR2	10	Yes	The code and name of the education credential or CE requirement. Valid values are restricted to those that have been user-configured on the Add Credential page in Producer Manager. The Producer Manager education credential code is expressed in the **Code** attribute. The element value is the education credential name description affixed with the description value of the **State** element, separated by a colon.

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Element	Data Type	Max Length	Required?	Definition
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: For education credentials: The **Reference Code** and **Name** fields in the Education Credentials data section of a producer record; For CE data: The **Requirement Type** field in the CE Requirements data section of a producer record • Database: Code: IL_CE_RQMT.CE_RQMT_TYPE_CD; Description: CRED.REG_BODY,CRED.NAME
State	VARCHAR2	10	Yes	A code representing the regulatory entity to which the education credential or CE requirement applies. **Note**: The codes expressed in the **State** element are not always state type codes; some may represent other oversight entities, such as FNR (FINRA) or INT (Internal). Valid values are restricted to those available in the RGLTRY_BDY_CD code group on the Maintain Codes page in Producer Manager. Field reference:

Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: For education credentials: The **Regulatory Body** field in the Education Credentials data section of a producer record; For CE data: The **Jurisdiction** field in the CE Requirements data section of a producer record • Database: CRED.REG_BODY or IL_CE_RQMT.ST_CD
AssignedReviewDate	DATE	10	No	The date by which the CE requirement is to be completed. **Note**: This element contains a value only when passing CE requirements data. If passing education credential information, an empty element is included. Field reference: • Producer Manager: For education credentials: none; For CE data: The **Assigned Review Date** field in the CE Requirements data section of a producer record • Database: IL_CE_RQMT. ASGN_RVW_DTE
RequiredHours	NUMBER (5,2)	5	No	The total number of course credit hours the producer must attain to meet the CE requirement. **Note**: This element is included only when passing CE requirements data. If passing education credential

Element	Data Type	Max Length	Required?	Definition
				information, the element is omitted.
				Field reference: - Producer Manager: For education credentials: none; For CE data: The **Required Hour Qty** field in the CE Requirements data section of a producer record - Database: IL_CE_RQMT. CE_RQMR_HR_QTY
AppliedHours	NUMBER (5,2)	5	No	The total number of course credit hours that are applied toward the CE requirement. **Note**: This element is included only when passing CE requirements data. If passing education credential information, the element is omitted. Field reference: - Producer Manager: For education credentials: none; For CE data: The **Applied Hour Qty** field in the CE Requirements data section of a producer record - Database: IL_CE_RQMT. APPLD_HR_QTY
Status	VARCHAR2	10	Yes	The producer's status with regard to the education credential or CE requirement. Valid values are restricted to those available in the CE_RQMT_STS_CD code group on the Maintain Codes page in Producer Manager.

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Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: For education credentials: The **Status** field in the Education Credentials data section of a producer record; For CE data: The **Status** field in the CE Requirements data section of a producer record • Database: IL_CE_RQMT.STS_CD
Note: For education credentials only, the value of an "N/A" status code in the **Inactive Credentials** sub-section of the Education Credentials data section on a producer record may be expressed in the **Status** element as either "NC" (Not Compliant) or "NR" (No Longer Required), depending on a Vertafore-configured business rule. For more information, see Configuration Options in the Producer Manager online help.				
StatusDate	DATE	10	Yes	The date on which the education credential status became effective or the CE requirement status last was updated. Field reference: • Producer Manager: For education credentials: The **Start Date** field in the Education Credentials data section of a producer record; For CE data: The **Status** field in the CE Requirements data section of a producer record • Database: IL_CE_RQMT.STS_DTE
AppliedCourses				The producer's CE coursework that has been applied to the producer's CE requirement. **Note**: This element contains a value only when

Element	Data Type	Max Length	Required?	Definition
				passing CE requirements data. If passing education credential information, an empty element is included.
				Refers to specific content in the AppliedCourses element.

AppliedCourses

Information about specific courses that have been applied to satisfy a continuing education (CE) requirement of an individual producer included in an OBDF export is contained in the **AppliedCourses** element, nested within a specific instance of the CourseRequirement element.

If applied courses information is triggered to be included in the export, each separate instance of the AppliedCourse child element may contain information about one course applied to satisfy a CE requirement.

AppliedCourse

The **AppliedCourse** element contains data pertaining to a single applied course.

The **AppliedCourse** element has the following attributes:

- Action

- InternalID

Attribute	Data Type	Max Length	Required?	Definition
Action	NUMBER	9	Yes	The database action that occurred that caused the applied course information to be included in the OBDF export. Valid values: • Insert • Update

Attribute	Data Type	Max Length	Required?	Definition
				• Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD
InternalID	VARCHAR2	10	Yes	The unique, system-assigned identifier of the applied course information in Producer Manager. Field reference: • Producer Manager: None • Database: IL_CRS_APPLD.IL_CRS_ID

Applied course content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- AppliedHours
- IneligibleHours
- CarryForwardHours
- CarryForwardReviewDate
- Course

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the applied course information to the producer record.

Element	Data Type	Max Length	Required?	Definition
				Field reference:
				• Producer Manager: None
				• Database: IL_CRS_APPLD.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the applied course information was added to the producer record.
				Field reference:
				• Producer Manager: None
				• Database: IL_CRS_APPLD.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the applied course information on the producer record.
				Field reference:
				• Producer Manager: None
				• Database: IL_CRS_APPLD.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the applied course information on the producer record was last modified.
				Field reference:
				• Producer Manager: None
				• Database: IL_CRS_APPLD.ROW_TMSP
AppliedHours	NUMBER (5,2)	5		The total number of course credit hours that are applied toward the CE requirement.
				Field reference:
				• Producer Manager: The **Applied Hour Qty** field in the CE Requirements data section of a

Element	Data Type	Max Length	Required?	Definition
				producer record
				• Database: IL_CRS_APPLD.APPLD_HR_QTY
IneligibleHours	NUMBER (5,2)	5		The number of course credit hours that are not or cannot be applied toward the CE requirement.
				Field reference:
				• Producer Manager: The **Ineligible Hour Qty** field in the CE Requirements data section of a producer record
				• Database: IL_CRS_APPLD.INELIG_HR_QTY
CarryForwardHours	NUMBER (5,2)	5		The number of course credit hours from a previous license term that are being applied toward the CE requirement.
				Field reference:
				• Producer Manager: The **Carry Forward Hour Qty** field in the CE Requirements data section of a producer record
				• Database: IL_CRS_APPLD.CRRY_FWD_HR_QTY
CarryForwardReviewDate	DATE	10		The date by which the CE requirement for the next license term -- toward which the value of the **CarryForwardHours** element is being applied -- is to be completed.
				Field reference:
				• Producer Manager: The **Carry Forward Review Date** field in the CE Requirements data section of a producer record
				• Database:

Element	Data Type	Max Length	Required?	Definition
				IL_CRS_APPLD.CRRY_FWD_RVW_DTE
Course				The CE course that has been applied to the producer's CE requirement. Refers to specific content in the Courses element.

StateProducerNumbers

State producer numbers information for each individual or firm producer included in an OBDF export is contained in the **StateProducerNumbers** element.

If state producer numbers information is triggered to be included in the export, each separate instance of the StateProducerNumber child element may contain one comment.

StateProducerNumber

The **StateProducerNumber** element contains data pertaining to a single state producer number related to an individual or a firm producer.

The **StateProducerNumber** element has the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the state producer number information in Producer Manager. Field reference: • Producer Manager: None

Attribute	Data Type	Max Length	Required?	Definition
				• Database: IL_ST_PRDCR_NBR.IL_ST_PRDCR_NBR_ID or AGY_ST_PRDCR_NBR.AGY_ST_PRDCR_NBR_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the state producer number information to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

State producer number content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- State
- ProducerNumber

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the state producer number information to the producer record.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: None • Database: IL_ST_PRDCR_NBR.ROW_INS_UID or AGY_ST_PRDCR_NBR.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the state producer number information was added to the producer record. Field reference: • Producer Manager: None • Database: IL_ST_PRDCR_NBR.ROW_INS_TMSP or AGY_ST_PRDCR_NBR.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the state producer number information on the producer record. Field reference: • Producer Manager: None • Database: IL_ST_PRDCR_NBR.ROW_UID or AGY_ST_PRDCR_NBR.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the state producer number information on the producer record was last modified. Field reference: • Producer Manager: None • Database: IL_ST_PRDCR_NBR.ROW_TMSP or AGY_ST_PRDCR_NBR.ROW_TMSP
State	VARCHAR2	10	Yes	A code representing the state associated with the state producer number. Content is restricted to a set of enumerated values in the StateProvinceCodeEnumType element. Field reference:

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Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: The **State** field in the State Producer Numbers data section of a producer record • Database: IL_ST_PRDCR_NBR.ST_CD or AGY_ST_PRDCR_NBR.ST_CD
ProducerNumber	VARCHAR2	30	Yes	The state producer number value. Field reference: • Producer Manager: The **Producer Number** field in the State Producer Numbers data section of a producer record • Database: IL_ST_PRDCR_NBR.PRDCR_NBR or AGY_ST_PRDCR_NBR.PRDCR_NBR

Transactions

Producer Express transaction request information for each individual or firm producer included in an OBDF export is contained in the **Transactions** element. It allows a customer to identify data in the OBDF export file that originated with a specific appointment or appoinment termination transaction in a Producer Express request.

Note: The **Transactions** node will include data only if your company also subscribes to Sircon Producer Express. Otherwise an empty node is exported.

Tip: Vertafore offers the **Transaction Data Web Service** to Producer Express customers wanting to update internal systems with more comprehensive, real-time information about Producer Express transaction request processing. If web service integration is not feasible, a file transfer service offering transaction request information, the **PX Extract**, also may be available. For more information, please contact your Vertafore representative.

If transactions information is triggered to be included in the export, each separate instance of the Transaction child element may contain information about one of a producer's Producer Express transactions.

Transaction

The **Transaction** element contains data pertaining to a single Producer Express transaction request for an individual or firm producer.

The **Transaction** element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the transaction in Producer Manager. Field reference: • Producer Manager: None • Database: PRDCR_RQST.PRDCR_RQST_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the transaction to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Transaction content is expressed in the following child elements:

- [InsertUserID](#)
- [InsertDateTime](#)
- [UpdateUserID](#)
- [UpdateDateTime](#)
- [TransactionID](#)
- [TransactionType](#)
- [TrackingIdentifier](#)
- [Status](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the transaction to the producer record. Field reference: • Producer Manager: None • Database: PRDCR_RQST.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the transaction was added to the producer record. Field reference: • Producer Manager: None • Database: PRDCR_RQST.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the transaction on the producer record. Field reference: • Producer Manager: None • Database: PRDCR_RQST.ROW_UID

Element	Data Type	Max Length	Required?	Definition
UpdateDateTime	DATE	19	No	The date and time stamp on which the transaction on the producer record was last modified. Field reference: • Producer Manager: The **Last Modified Date** field in the Transactions data section of a producer record • Database: PRDCR_RQST.ROW_TMSP
TransactionID	NUMBER	9	Yes	The Producer Express request or transaction record ID. Field reference: • Producer Manager: The **PX Transaction ID** field in the Transactions data section of a producer record • Database: PRDCR_RQST.PRDCR_RQST_ID
TransactionType	VARCHAR2	255	Yes	A code representing the Producer Express request or transaction type (a.k.a., "packet type"). **Note**:**TransactionType** code values are unique to each customer's configuration of Producer Express. Therefore it is not possible to enumerate valid code values in this document. Vertafore Sircon will provide a list of valid packet type codes as part of the OBDF implementation project. For more information, please consult your Vertafore representative. Field reference: • Producer Manager: The **Transaction Type** field in the Transactions data section of a producer record • Database: PRDCR_RQST.TX_TYPE
TrackingIdentifier	VARCHAR2	100	No	A customer-supplied code or identifier to track an appointment or appointment termination request submitted as part of the Producer Express request or transaction. It is intended to

Element	Data Type	Max Length	Required?	Definition
				tie together initial and subsequent appointment transactions to states that do not appoint based on specific license lines of authority. **Note**: The **TrackingIdentifier** element will contain data only if your company is configured to initiate appointment or appointment termination requests through the **Producer Management Web Service**. Note: **TrackingIdentifier** also is passed in the Appointments node, once an appointment transaction request is processed by Producer Express. Field reference: • Producer Manager: The **Custom Tracking ID** field in the Transactions data section of a producer record • Database: PRDCR_RQST.TRACKING_ID
Status	VARCHAR2	10	Yes	The status of the Producer Express request or transaction. Valid values: • CLSD: Closed (manually stopped) • ERR: Error • HOLDEVENT: On hold awaiting a system event • OPN: Open awaiting user action • PN: Pending system action • PROC: Processed (completed) Field reference: • Producer Manager: The **Status** field in the Transactions data section of a producer record

Element	Data Type	Max Length	Required?	Definition
				• Database: PRDCR_RQST.STS_CD

ProfessionalLiabilityPolicies

Information about a producer's professional liability coverage, such as errors and omissions (E&O) insurance or bonds, is included in an OBDF export in the **ProfessionalLiabilityPolicies** element.

If professional liability coverage information is triggered to be included in the export, each separate instance of the ProfessionalLiabilityPolicy child element may contain information about one of a producer's professional liability coverages.

ProfessionalLiabilityPolicy

The **ProfessionalLiabilityPolicy** element contains data pertaining to a single professional liability coverage for a producer.

The **ProfessionalLiabilityPolicy** element has the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the professional liability coverage information in Producer Manager. Field reference: • Producer Manager: None • Database: POLICY.POLICY_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the professional liability coverage information to be included in the OBDF export.

Attribute	Data Type	Max Length	Required?	Definition
				Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Professional liability coverage information content is expressed in the following child elements:

- InsertUserID

- InsertDateTime

- UpdateUserID

- UpdateDateTime

- PolicyType

- PolicyNumber

- CompanyName

- EffectiveDate

- ExpirationDate

- PerIncidentAmount

- TotalCoverageAmount

- Exclusions

Element	Data Type	Max Length	Required?	Definition

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Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the professional liability coverage information to the producer record. Field reference: • Producer Manager: The **Added By** field in the **Audit Information** sub-section of the Professional Liability data section of a producer record • Database: POLICY.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the professional liability coverage information was added to the producer record. Field reference: • Producer Manager: The **Added By** field in the **Audit Information** sub-section of the Professional Liability data section of a producer record • Database: POLICY.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the professional liability coverage information on the producer record. Field reference: • Producer Manager: The **Updated By** field in the **Audit Information** sub-section of the Professional Liability data section of a producer record • Database: POLICY.ROW_UID

Element	Data Type	Max Length	Required?	Definition
UpdateDateTime	DATE	19	No	The date and time stamp on which the professional liability coverage information on the producer record was last modified. Field reference: • Producer Manager: The **Updated By** field in the **Audit Information** sub-section of the Professional Liability data section of a producer record • Database: POLICY.ROW_TMSP
PolicyType	VARCHAR2	10	Yes	The type of professional liability coverage held by the producer. Valid values: POLICY: An errors & omissions insurance policy BOND: A surety bond Field reference: • Producer Manager: The **Type** field in the Professional Liability data section of a producer record • Database: POLICY.POLICY_TYPE
PolicyNumber	VARCHAR2	30	Yes	The policy number of the producer's professional liability coverage. Field reference: • Producer Manager: The **Policy Number** field in the Professional Liability data section of a producer record • Database: POLICY.POLICY_NUMBER

Element	Data Type	Max Length	Required?	Definition
CompanyName	VARCHAR2	155	No	The name of the company issuing the producer's professional liability coverage. Field reference: • Producer Manager: The **Company** field in the Professional Liability data section of a producer record • Database: POLICY.COMPANY_NAME
EffectiveDate	DATE	10	Yes	The beginning date of the effective period of the producer's professional liability coverage. Field reference: • Producer Manager: The **Coverage Period** field in the Professional Liability data section of a producer record • Database: POLICY.EFFECTIVE_DTE
ExpirationDate	DATE	10	No	The ending date of the effective period of the producer's professional liability coverage. Field reference: • Producer Manager: The **Coverage Period** field in the Professional Liability data section of a producer record • Database: POLICY.EXPIRATION_DTE
PerIncidentAmount	NUMBER (18,2)	18	No	The limit in dollars and cents payable per claim or incident under the producer's professional liability coverage. Field reference: • Producer Manager: The **Per-Incident Coverage** field in the Professional Liability

Element	Data Type	Max Length	Required?	Definition
				data section of a producer record • Database: POLICY.PER_INCIDENT_AMT
TotalCoverageAmount	NUMBER (18,2)	18	No	The aggregate limit in dollars and cents payable during the effective period under the producer's professional liability coverage. Field reference: • Producer Manager: The **Total Coverage** field in the Professional Liability data section of a producer record • Database: POLICY.TOTAL_COVERAGE_AMT
Exclusions				The types of claims specifically excluded under the terms of the producer's professional liability coverage. Refers to specific content in the Exclusions element.

Exclusions

Information about exclusions to a producer's professional liability coverage is included in an OBDF export in the **Exclusions** element, nested within a specific instance of the ProfessionalLiabilityPolicy element.

If professional liability coverage exclusions information is triggered to be included in the export, each separate instance of the Exclusion child element may contain information about one of a producer's professional liability coverage exclusions.

Exclusion

The **Exclusion** element contains data pertaining to a single professional liability coverage exclusion for a producer.

The **Exclusion** element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the professional liability coverage exclusion in Producer Manager. Field reference: • Producer Manager: None • Database: POLICY_EXCLUSION.POLICY_EXCLUSION_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the professional liability coverage exclusion to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Professional liability coverage exclusion content is expressed in the following child elements:

- InsertUserID

- InsertDateTime

- UpdateUserID

- UpdateDateTime

- Type

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the professional liability coverage exclusion to the producer record. Field reference: • Producer Manager: None • Database: POLICY_EXCLUSION.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the professional liability coverage exclusion was added to the producer record. Field reference: • Producer Manager: None • Database: POLICY_EXCLUSION.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the professional liability coverage exclusion on the producer record. Field reference: • Producer Manager: None • Database: POLICY_EXCLUSION.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the professional liability coverage exclusion on the producer record was last modified. Field reference: • Producer Manager: None • Database: POLICY_EXCLUSION.ROW_TMSP
Type	VARCHAR2	10	Yes	A code representing the type of claims specifically excluded under the terms of the producer's professional liability coverage.

Element	Data Type	Max Length	Required?	Definition
				Note: Valid codes are obtained from the PROF_LIAB_EXCL_TYPE_CD code domain on the Maintain Codes page in Producer Manager. Field reference: • Producer Manager: The **Exclusions** field in the Professional Liability data section of a producer record • Database: POLICY_EXCLUSION.TYPE_CD (PROF_LIAB_EXCL_TYPE_CD)

SecuritiesInformation

Securities information for an individual producer is included in an OBDF export in the **SecuritiesInformation** element.

The **SecuritiesInformation** element contains the following child elements:

• BrokerDealers

• SecuritiesExams

BrokerDealers

Securities registration information pertaining to an individual producer's associated broker/dealers is contained in the **BrokerDealers** element.

If securities registration information is triggered to be included in the export, each separate instance of the BrokerDealer child element may contain information about a producer's securities registration information pertaining to one associated broker/dealer.

BrokerDealer

Securities registrations pertaining to a specific broker/dealer with which a producer is or was associated are contained in the

BrokerDealer element.

The **BrokerDealer** element has the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the broker/dealer securities registration information in Producer Manager. Field reference: • Producer Manager: None • Database: SEC_RELATIONSHIP.SEC_RELATIONSHIP_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the broker/dealer securities registration information to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

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Broker/dealer-related securities registration content is expressed in the following child elements:

- [InsertUserID](#)

- [InsertDateTime](#)

- [UpdateUserID](#)

- [UpdateDateTime](#)

- [Name](#)

- [EIN](#)

- [ExternallyVerifiedIndicator](#)

- [StateRegistrations](#)

- [SroRegistrations](#)

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the broker/dealer securities registration information to the producer record. Field reference: • Producer Manager: None • Database: SEC_RELATIONSHIP. ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the broker/dealer securities registration information was added to the producer record. Field reference: • Producer Manager: None • Database:

Element	Data Type	Max Length	Required?	Definition
				SEC_RELATIONSHIP.ROW_INS_T MSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the broker/dealer securities registration information on the producer record. Field reference: • Producer Manager: None • Database: SEC_RELATIONSHIP.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the broker/dealer securities registration information on the producer record was last modified. Field reference: • Producer Manager: None • Database: SEC_RELATIONSHIP.ROW_TMSP
Name	VARCHAR2	155	Yes	The business name of the broker/dealer related to the producer's securities registration. Field reference: • Producer Manager: The **[Firm Name]** in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: ORG.ORG_NAME

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Element	Data Type	Max Length	Required?	Definition
EIN	NUMBER	10	Yes	The Federal Employer Identification Number of the broker/dealer related to the producer's securities registration. Field reference: • Producer Manager: None • Database: ORG.EIN
ExternallyVerifiedIndicator	VARCHAR2	1	Yes	Indicates if the broker/dealer-related securities registrations have been verified against an external data source. Valid values: • Y: Externally validated • N: Not externally validated Field reference: • Producer Manager: A flag at the broker/dealer level in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: SEC_RELATIONSHIP. CUR_WAIVER_STS_CD
StateRegistrations				The producer's broker/dealer-related state securities registrations. Refers to specific content in the StateRegistrations element.
SroRegistrations				The producer's broker/dealer-related self-regulatory organization (SRO) securities registrations.

Element	Data Type	Max Length	Required?	Definition
				Refers to specific content in the SroRegistrations element.

SecuritiesExams

Information pertaining to an individual producer's securities examinations is contained in the **SecuritiesExams** element.

If securities examination information is triggered to be included in the export, each separate instance of the SecuritiesExam child element may contain information about one of a producer's securities examinations.

SecuritiesExam

The **SecuritiesExam** element contains data about a single securities examination.

The **SecuritiesExam** element has the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the securities examination information in Producer Manager. Field reference: • Producer Manager: None • Database: SEC_EXAM.SEC_EXAM_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the securities examination information to be included in the OBDF export.

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Attribute	Data Type	Max Length	Required?	Definition
				Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Securities examination content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- ExamCode
- StatusCode
- StatusDate

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the securities examination information to the producer record. Field reference: • Producer Manager: The **Added By** field in the **Exams** sub-section of the Securities Information data section of a producer record

Element	Data Type	Max Length	Required?	Definition
				• Database: SEC_EXAM.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the securities examination information was added to the producer record. Field reference: • Producer Manager: The **Added By** field in the **Exams** sub-section of the Securities Information data section of a producer record • Database: SEC_EXAM.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the securities examination information on the producer record. Field reference: • Producer Manager: The **Updated By** field in the **Exams** sub-section of the Securities Information data section of a producer record • Database: SEC_EXAM.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the securities examination information on the producer record was last modified. Field reference: • Producer Manager: The **Updated By** field in the **Exams** sub-section of the Securities Information data section of a producer record • Database: SEC_EXAM.ROW_TMSP
ExamCode	VARCHAR2	10	Yes	The type of the securities examination. Valid values are restricted to those available in the SEC_EXAM_TYPE_CD code group on the **Maintain Codes** page in Producer Manager. The Producer Manager exam code is expressed in the **Code** attribute. The element value is the exam code description.

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Element	Data Type	Max Length	Required?	Definition
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Type** field in the **Exams** sub-section of the Securities Information data section of a producer record • Database: SEC_EXAM.TYPE_CD (SEC_EXAM_TYPE_CD)
StatusCode	VARCHAR2	10	Yes	The status of the securities examination. Valid values are restricted to those available in the SEC_EXAM_STS_CD code group on the Maintain Codes page in Producer Manager. The Producer Manager status code is expressed in the **Code** attribute. The element value is the status description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Status** field in the **Exams** sub-section of the Securities Information data section of a producer record • Database: SEC_EXAM.STS_CD (SEC_EXAM_STS_CD)
StatusDate	DATE	10	No	The date on which the **StatusCode** was most recently updated. Field reference: • Producer Manager: The **Status Date** field in the **Exams** sub-section of the Securities Information data section of a producer record

Element	Data Type	Max Length	Required?	Definition
				• Database: SEC_EXAM.STS_DTE

StateRegistrations

A producer's broker/dealer-related state securities registrations are contained in the **StateRegistrations** element, nested within a specific instance of the SecuritiesInformation element.

If state securities registration information is triggered to be included in the export, each separate instance of the StateRegistration child element may contain information about one of a producer's state registrations.

StateRegistration

The **StateRegistration** element contains data pertaining to a single broker/dealer-related state registration for a producer.

The **StateRegistration** element has the following attributes:

- InternalID
- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the state registration in Producer Manager. Field reference: • Producer Manager: None • Database: SEC_ST_REGISTRATION.SEC_ST_REGISTRATION_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the state registration to be included in the OBDF export. Valid values:

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Attribute	Data Type	Max Length	Required?	Definition
				• Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

State registrations content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- State
- CategoryCode
- ApprovalDate
- FinraStatus
- StatusDate
- SourceCode

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the state registration to the producer record.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **Added By** field in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: SEC_ST_REGISTRATION.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the state registration was added to the producer record. Field reference: • Producer Manager: The **Added By** field in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: SEC_ST_REGISTRATION.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the state registration on the producer record. Field reference: • Producer Manager: The **Updated By** field in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: SEC_ST_REGISTRATION.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the state registration on the producer record was last modified. Field reference: • Producer Manager: The **Updated By** field in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: SEC_ST_REGISTRATION.ROW_TMSP
State	VARCHAR2	10	Yes	A code representing the name of the registration state. Content is restricted to a set of enumerated values in the StateCodeEnumType element. Field reference:

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Element	Data Type	Max Length	Required?	Definition
				• Producer Manager: The **State** field in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: SEC_ST_REGISTRATION.ST_CD
CategoryCode	VARCHAR2	10	Yes	A code representing the registration category. Valid values are restricted to those available in the ST_REG_CAT_CD code group on the **Maintain Codes** page in Producer Manager. The Producer Manager category code is expressed in the **Code** attribute. The element value is the category description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions. Field reference: • Producer Manager: The **Category** field in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: SEC_ST_REGISTRATION.CATEGORY_CD (ST_REG_CAT_CD)
ApprovalDate	DATE	10	No	The date on which the state registration was approved. Field reference: • Producer Manager: The **Approval Date** field in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: SEC_ST_REGISTRATION.APPROVAL_DTE
FinraStatus	VARCHAR2	10	Yes	A code representing the status of the registration with the Financial Industry Regulatory Authority. Valid values are restricted to those available in the SEC_FINRA_STS_CD code group on the Maintain Codes page in Producer Manager.

Element	Data Type	Max Length	Required?	Definition
				The Producer Manager FINRA status code is expressed in the **Code** attribute. The element value is the FINRA status description.
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
				Field reference:
				• Producer Manager: The **FINRA Status** field in the **Registrations** sub-section of the Securities Information data section of a producer record
				• Database: SEC_ST_REGISTRATION.FINRA_STS_CD (SEC_FINRA_STS_CD)
StatusDate	DATE	10	Yes	The date on which the registration's FINRA status was last updated. Field reference: • Producer Manager: The **Status Date** field in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: SEC_ST_REGISTRATION.FINRA_STS_DTE
SourceCode	VARCHAR2	10	Yes	The source of the registration data. Valid values: • FINRA: Registration obtained through integration with the Financial Industry Regulatory Authority • PM: Registration added manually to the producer's record in Producer Manager Field reference: • Producer Manager: None • Database: SEC_ST_REGISTRATION.SRC_CD

SroRegistrations

A producer's broker/dealer-related self-regulating organization (SRO) securities registrations are contained in the **SroRegistrations** element, nested within a specific instance of the SecuritiesInformation element.

If SRO securities registration information is triggered to be included in the export, each separate instance of the SroRegistration child element may contain information about one of a producer's SRO registrations.

SroRegistration

The **SroRegistration** element contains data pertaining to a single broker/dealer-related SRO registration for a producer.

The **SroRegistration** element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the SRO registration in Producer Manager. Field reference: • Producer Manager: None • Database: SEC_SRO_REGISTRATION.SEC_SRO_REGISTRATION_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the SRO registration to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None

Attribute	Data Type	Max Length	Required?	Definition
				• Database: ACTN_CD

SRO registrations content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- SroCode
- CategoryCode
- ApprovalDate
- FinraStatus
- StatusDate
- SourceCode

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The user name of the human or system user that added the SRO registration to the producer record. Field reference: • Producer Manager: The **Added By** field in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: SEC_SRO_REGISTRATION. ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the SRO registration was added to the producer record. Field reference: • Producer Manager: The **Added By** field in the **Registrations** sub-section of the

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Element	Data Type	Max Length	Required?	Definition
				Securities Information data section of a producer record • Database: SEC_SRO_REGISTRATION. ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The user name of the human or system user that last modified the SRO registration on the producer record. Field reference: • Producer Manager: The **Updated By** field in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: SEC_SRO_REGISTRATION. ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the SRO registration on the producer record was last modified. Field reference: • Producer Manager: The **Updated By** field in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: SEC_SRO_REGISTRATION. ROW_TMSP
SroCode	VARCHAR2	10	Yes	A code representing the self-regulatory organization type. Valid values are restricted to those available in the SRO_REG_TYPE_CD code group on the **Maintain Codes** page in Producer Manager. Field reference: • Producer Manager: The **SRO** field in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: SEC_SRO_REGISTRATION.SRO_TYPE_CD (SRO_REG_TYPE_CD)
CategoryCode	VARCHAR2	10	Yes	A code representing the registration category. Valid values are restricted to those available in the SRO_REG_CAT_CD code group on the **Maintain Codes** page in Producer Manager.

Element	Data Type	Max Length	Required?	Definition
				The Producer Manager category code is expressed in the **Code** attribute. The element value is the category description.
				Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.
				Field reference: - Producer Manager: The **Category** field in the **Registrations** sub-section of the Securities Information data section of a producer record - Database: SEC_SRO_REGISTRATION.CATEGORY_CD (SRO_REG_CAT_CD)
ApprovalDate	DATE	10	No	The date on which the state registration was approved. Field reference: - Producer Manager: The **Approval Date** field in the **Registrations** sub-section of the Securities Information data section of a producer record - Database: SEC_SRO_REGISTRATION.APPROVAL_DTE
FinraStatus	VARCHAR2	10	Yes	A code representing the status of the registration with the Financial Industry Regulatory Authority. Valid values are restricted to those available in the SEC_FINRA_STS_CD code group on the Maintain Codes page in Producer Manager. The Producer Manager FINRA status code is expressed in the **Code** attribute. The element value is the FINRA status description. **Note**: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.

Element	Data Type	Max Length	Required?	Definition
				Field reference: • Producer Manager: The **FINRA Status** field in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: SEC_SRO_REGISTRATION.FINRA_STS_CD (SEC_FINRA_STS_CD)
StatusDate	DATE	10	Yes	The date on which the registration's FINRA status was last updated. Field reference: • Producer Manager: The **Status Date** field in the **Registrations** sub-section of the Securities Information data section of a producer record • Database: SEC_SRO_REGISTRATION.FINRA_STS_DTE
SourceCode	VARCHAR2	10	Yes	The source of the registration data. Valid values: • FINRA: Registration obtained through integration with the Financial Industry Regulatory Authority • PM: Registration added manually to the producer's record in Producer Manager Field reference: • Producer Manager: None • Database: SEC_SRO_REGISTRATION.SRC_CD

AuthorizationOverrides

Information about staff member overrides of an individual or firm producer's sales authorization check results is included in an OBDF export in the **AuthorizationOverrides** element.

If authorization override information is triggered to be included in the export, each separate instance of the AuthorizationOverride child element may contain information about one of a producer's sales authorization overrides.

AuthorizationOverride

The **AuthorizationOverride** element contains data pertaining to a single authorization override for a producer.

The **AuthorizationOverride** element has the following attributes:

- InternalID

- Action

Attribute	Data Type	Max Length	Required?	Definition
InternalID	NUMBER	9	Yes	The unique, system-assigned identifier of the sales authorization override information in Producer Manager. Field reference: • Producer Manager: None • Database: AUTH_OVERRIDE.RULE_SETTINGS_ID
Action	VARCHAR2	10	Yes	The database action that occurred that caused the sales authorization override information to be included in the OBDF export. Valid values: • Insert • Update • Delete • None Field reference: • Producer Manager: None • Database: ACTN_CD

Sales authorization override information content is expressed in the following child elements:

- InsertUserID
- InsertDateTime
- UpdateUserID
- UpdateDateTime
- State
- ProductCode
- Event
- CompanyNAIC_ID
- EffectiveDate
- ExpirationDate
- Reason
- OverridingResult

Element	Data Type	Max Length	Required?	Definition
InsertUserID	VARCHAR2	30	No	The username of the human or system user that added the sales authorization override to the producer record. Field reference: • Producer Manager: The **Created By** field in the Authorization Overrides data section of a producer record • Database: AUTH_OVERRIDE.ROW_INS_UID
InsertDateTime	DATE	19	No	The date and time stamp on which the sales authorization override information was added to the producer record. Field reference: • Producer Manager: The **Created By** field in the Authorization Overrides data section of a producer record

Element	Data Type	Max Length	Required?	Definition
				• Database: AUTH_OVERRIDE.ROW_INS_TMSP
UpdateUserID	VARCHAR2	30	No	The username of the human or system user that last modified the sales authorization override information on the producer record. Field reference: • Producer Manager: None • Database: AUTH_OVERRIDE.ROW_UID
UpdateDateTime	DATE	19	No	The date and time stamp on which the sales authorization override information on the producer record was last modified. Field reference: • Producer Manager: None • Database: AUTH_OVERRIDE.ROW_TMSP
State	VARCHAR2	2	Yes	A code representing the state in which the producer's sales authorization result is overridden. Will contain "All States" if the override applies to all states.Field reference: • Producer Manager: The **State** field in the Authorization Overrides data section of a producer record • Database: AUTH_OVERRIDE.ST_CD
ProductCode	VARCHAR2	30	Yes	A code representing the product type for which the producer's sales authorization result is overridden. Will contain "All Products" if the override applies to all available product types. Field reference: • Producer Manager: The **Product** field in the Authorization Overrides data section of a producer record • Database: AUTH_OVERRIDE.PRODUCT_CD

Element	Data Type	Max Length	Required?	Definition
Event	VARCHAR2	10	Yes	A code representing the sales event for which the producer's sales authorization result is overridden. Will contain "All Sales Events" if the override applies to all sales events. Field reference: • Producer Manager: The **Sales Event** field in the Authorization Overrides data section of a producer record • Database: AUTH_OVERRIDE.EVENT
CompanyNAIC_ID	VARCHAR2	5	Yes	The National Association of Insurance Commissioners identifier of the appointing company for which the producer's sales authorization result is overridden. Will contain "All Writing Companies" if the override applies to all available appointing companies.Field reference: • Producer Manager: The **Writing Company** field in the Authorization Overrides data section of a producer record • Database: AUTH_OVERRIDE.NAIC_ID
EffectiveDate	DATE	10	Yes	The begin date of the producer's sales authorization override. Field reference: • Producer Manager: The **Effective Dates** field in the Authorization Overrides data section of a producer record • Database: AUTH_OVERRIDE.EFFECTIVE_DTE
ExpirationDate	DATE	10	No	The end date of the producer's sales authorization override. Field reference: • Producer Manager: The **Effective Dates** field in the Authorization Overrides data section of a producer record • Database: AUTH_OVERRIDE.EXPIRATION_DTE

Element	Data Type	Max Length	Required?	Definition
Reason	VARCHAR2	2000	No	A free text comment related to the sales authorization override. Field reference: • Producer Manager: The **Reason** field in the Authorization Overrides data section of a producer record • Database: AUTH_OVERRIDE.REASON
OverridingResult	VARCHAR2	1	Yes	The result of the producer's sales authorization as a consequence of the authorization override. Valid values: • F: Not Authorized Field reference: • Producer Manager: The **Type** field in the Authorization Overrides data section of a producer record • Database: AUTH_OVERRIDE.OVERRIDING_RESULT

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Code Lookups

</div>

LicenseTermCodeEnumType

The **LicenseTermCodeEnumType** element provides code lookup values for state-specific license inactivation reasons. It is referred to by the InactivationReason child element in the Licenses node.

Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.

Element	Data Type	Max Length	Required?	Definition
LicenseTermCodeEnumType	VARCHAR2	10	No	Code lookup values for state-specific license inactivation reasons. The string is restricted to one of the following enumerated values: • 001: Absent Parent • 002: Activated in Error • 003: Bond Cancellation • 004: Converting to Agent License

Element	Data Type	Max Length	Required?	Definition
				• 005: By Commissioner's Order
				• 006: Canceled
				• 007: Clearance Request
				• 008: Deceased
				• 009: Department of Insurance Employee
				• 010: Dissolved
				• 011: Failure to Pay Child Support
				• 012: Failure to Renew
				• 013: Lapsed
				• 014: Merged
				• 015: Merger or Consolidation
				• 016: Moved out of State
				• 017: No Authorized Designee
				• 018: No Supporting Appointment
				• 019: Non Sufficient Funds
				• 020: Obtained Life, Accident and Health Qualification
				• 021: Obtained Property and Casualty 022: Order to Show Cause
				• 023: Renewal Denied
				• 024: Revoked
				• 025: Surrendered in Lieu of Administrator
				• 026: Suspended
				• 027: Suspended for Compliance
				• 028: Suspended for Education

Element	Data Type	Max Length	Required?	Definition
				• 029: Suspended by Commissioner's Order
				• 030: Tax Warrant
				• 031: Unknown
				• 032: Voluntary Terminate/CE Noncompliance
				• 033: Voluntary Surrender
				• 034: Voluntary Terminate by Consent
				• 035: Cancel Continuing Education
				• 036: Denial of License
				• 047: Renewal Pending
				• 048: Nonrenewal
				• 051: Cancel- noncompliance CE
				• 052: Expired
				• 053: Grace Period
				• 054: Changed resident state
				• 055: Incomplete Conversion
				• 057: Cancelled- Individual Request
				• 058: License Denied
				• 059: License Denied- no response
				• 060: Nonrenewal- insurer request
				• 061: Application Pending
				• 062: Questionable Qualifications
				• 063: Do Not Relicense
				• 064: Canceled- Insurer Request

Element	Data Type	Max Length	Required?	Definition
				• 065: Cancelled- Agent Requested
				• 066: Suspension Grace
				• 067: CE Exempt Legislator
				• 068: Terminated
				• 069: Continuation fee not paid
				• 070: Administrative Action
				• 071: Cancelled License
				• 072: Reinstated
				• 073: Administrative Termination
				• 074: No license ever issued
				• 075: Application Denied
				• 076: No show for exam scheduled
				• 077: Failed exam
				• 078: Do not handle Workers Comp.
				• 079: General Lines held open
				• 080: Licensed/May have active appointment
				• 081: Lost qualifications
				• 082: Miscellaneous Reasons
				• 083: Pending CE for 084: License application under review
				• 085: Temp license app under review
				• 086: Awaiting CE verification
				• 087: Retired or moved out of state
				• 088: Pending Reinstatement

Element	Data Type	Max Length	Required?	Definition
				• 089: License request withdrawn
				• 090: Surrendered-admin Order
				• 091: Authorized for examination
				• 092: License Terminated
				• 093: CE is now required
				• 094: Voluntarily canceled
				• 096: Failure to meet CE requirements
				• 097: Non active
				• 098: Non-continued
				• 099: Voluntary Non-renewal
				• 100: Probationary
				• 101: Amendment
				• 102: Transfer
				• 103: Refused
				• 104: Noncompliance-CE
				• 105: Not Available
				• 106: Name Change
				• 107: Pending
				• 108: Inactive
				• 109: Administrative Action Dismissed
				• 110: Clearance Letter 111: Limited
				• 112: Non-comply or Surrendered
				• 113: Nonresident

Element	Data Type	Max Length	Required?	Definition
				• 114: Resident
				• 115: Action Pending
				• 116: Active
				• 117: Active Temp-No Appts
				• 118: Active Temp-No Regis Agents
				• 119: Active-No Regis Agents
				• 120: Application Expired
				• 121: Application Merged to Existing License
				• 122: Approval Process
				• 123: Approved
				• 124: Cancelled by Agency
				• 125: Cancelled by Agent
				• 126: Cancelled by Clearance Letter
				• 127: Cancelled by Company
				• 128: Cancelled CE Violation
				• 129: CE Suspended
				• 130: Conservatorship
				• 131: Inactive Agent Status
				• 132: Liquidation
				• 133: No Appointments
				• 134: Non-Admitted Eligible
				• 135: Non-Admitted Intelligible
				• 137: Normal

Element	Data Type	Max Length	Required?	Definition
				• 138: Pending/In Process 139: Receivership
				• 140: Rehabilitation
				• 141: Special Circumstances
				• 142: Suspended by Lack of Child Support
				• 143: Temporary License Expired
				• 144: Temporary Normal
				• 145: Terminated No Agents
				• 146: Terminated-Repeal of Regulatory Authority
				• 147: Terminated-No Appointments over 60days
				• 148: Voluntarily/not writing business
				• 149: Withdrawn
				• 178: Continuing Education Not Met
				• 191: Cancelled by Commissioner
				• 221: Cancelled - by Department
				• 222: Cancelled-Computer Generated
				• 223: Cancelled-House Keeping
				• 224: Cancelled-Moved From State
				• 225: Cancelled-Non Renewal
				• 226: Cancelled-No Appointments
				• 227: Company Requested
				• 228: Housekeeping
				• 229: Pending Admission
				• 230: Pending Renewal 231: Suspension of License

Element	Data Type	Max Length	Required?	Definition
				• 232: Under Review
				• 233: Denied Admission
				• 234: Voluntary Withdrawal
				• 235: Initial Approval
				• 236: Pending Amendment
				• 237: Amendment Initial Approval
				• 238: DNU-Revoked
				• 239: DNU-Suspension
				• 240: Non-Mass
				• 241: Mass Adjuster
				• 242: Indefinitely Suspended
				• 243: Suspension Stayed
				• 244: Denied
				• 245: Hold
				• 246: Unlicensed
				• 247: Void
				• 248: Locked Out
				• 249: Appointment Needed
				• 250: Application Required
				• 253: General
				• 255: Other
				• 256: Suspended for admin. Action
				• 257: Suspended-failure to meet CE

Element	Data Type	Max Length	Required?	Definition
				• 258: No Company Appointment
				• 260: Suspended Active
				• 261: Suspended Inactive
				• 262: Cease and Desist(Active)
				• 263: Cease and Desist(Inactive) 264: Inactive(Deceased)
				• 265: Inactive-Law Change
				• 266: Excluding Auto Insurance ,Auto Liability
				• 267: Excluding Auto Insurance and Physical Damage
				• 268: Excluding Marine Coverages
				• 269: Excluding Mortgage and Financial
				• 270: Excluding Motor Vehicle Liability and Worker's Compensation
				• 271: Excluding Worker's Compensation
				• 272: HMO Only
				• 273: Limited to TandMG,CCI,DGI,
				• 274: Limited to Mortgage Guarantee
				• 275: Limited to Reinsurance
				• 276: Denied License Request
				• 277: Limited to Workers Compensation
				• 278: P4LimitedtoReinsurance
				• 279: P7LimitdtoFidelity-Surety
				• 28: No longer represents agency
				• 280: Restricted to Servicing Carrier
				• 281: Restricted 282: Restricted to Servicing Existing

Element	Data Type	Max Length	Required?	Definition
				• 283: Servicing IRA Business
				• 284: Servicing Multi-State Accounts
				• 283: Surrendered with Prejudice
				• 286: Involuntary Cancel by Dept
				• 287: Licd Not Currently Appointed
				• 288: Commissioner's order
				• 289: Voluntary Surrender/Ecase Pend
				• 290: Pending License
				• 291: Expired Renewable
				• 292: Expired Non-renewable
				• 293: Probation-active
				• 295: Approved in Error
				• 296: Appointments
				• 298: Request by insurer
				• 299: Sent Back
				• 300: Temporary
				• 301: Licensed
				• 302: Terminated-Non Resident
				• 303: Surrendered Voluntarily
				• 304: Administratively Terminated
				• 305: Admin Terminated for CE
				• 306: Converted
				• 307: Exempt

Element	Data Type	Max Length	Required?	Definition
				• 308: Application Withdrawn
				• 309: Not Applicable
				• 310: Additional Info needed
				• 311: Exists on Legal DB
				• 312: RIRS Exists
				• 313: Cancelled For Cause
				• 314: Company Indebtness
				• 315: Company Defunct or Liquidation
				• 316: Company Merger
				• 317: Inadequate
				• 318: Voluntary Surrender Per Agent Request
				• 319: Suspended/Surrendered
				• 320: Data Conversion
				• 321: Surrendered License
				• 322: Active License
				• 323: Administrative
				• 324: Appointment Lapsed
				• 325: Bail Lic Suspended
				• 326: Bank/Bank Owned
				• 327: Bond Amount Increased
				• 328: Bond Cancelled By Carrier
				• 329: Bond Carrier Out of Business
				• 330: By Commissioner

Element	Data Type	Max Length	Required?	Definition
				• 331: Cancel-noncomplnce Financial
				• 332: Canceled-History
				• 333: Cancel-noncompliance department regulation
				• 334: Cancelled-Agency Request
				• 335: Cease and Desist
				• 336: Changed to Agent
				• 337: Changed to Broker
				• 338: Changed to Solicitor
				• 339: Company decision/for cause
				• 340: Complaint
				• 341: Confidential Comment
				• 342: Department Cancelled
				• 343: Designation Withdrawn
				• 344: Do Not Renew
				• 345: Duplicate License
				• 346: Exam passed - permanent license
				• 347: Exempt CE-IEAC
				• 348: Exempt from Cont Ed
				• 349: Expire-temporary license time limit
				• 350: Expired Broker
				• 351: Expired Surplus Line
				• 352: Failure to Pay
				• 353: File Closed

Element	Data Type	Max Length	Required?	Definition
				• 354: Fined
				• 355: Information
				• 356: Insufficient Funds
				• 357: Insurer appointment not renewed
				• 358: Insurer terminated
				• 359: Invalid Address
				• 360: Involuntary Surrender
				• 361: Issued License
				• 362: License Denied Renewal 363: License is not Renewed
				• 364: Medical Ex Cont Ed
				• 365: No Active Appointments
				• 366: No Active Appointments/Designation
				• 367: No Active Licenses
				• 368: No Active Sponsorship
				• 369: No Active Design to sustain License
				• 370: No Bond
				• 371: No Bond to Secure Appointment
				• 372: Not Renewed
				• 373: Outstanding Fine
				• 374: Preserve Fee
				• 375: Preserve Residency
				• 376: Qualification Expired
				• 377: Reciprocal agreement-cancel

Element	Data Type	Max Length	Required?	Definition
				• 378: Renewal Fee not paid
				• 379: Renewal Refused by DOI
				• 380: Renewed Surplus Lines
				• 381: Reporting Forms
				• 382: Returned License
				• 383: Revoked - Life and Health
				• 384: Revoked - Property and Casualty
				• 385: Revoked-multiple times
				• 386: Revoked by Order
				• 387: Revoked for Cause 388: Revoked/Outstng Fine
				• 389: See Comments
				• 390: Similar Name
				• 391: Stop Payment
				• 392: Summary Suspension
				• 393: Surrender of Limited License
				• 394: Suspended and Outstanding Fine
				• 395: Suspended-Life and Health
				• 396: Suspended-Property and Casualty
				• 397: Suspended Legal
				• 398: Temporary License
				• 399: Terminated License
				• 400: Two Diff Type Lic
				• 401: Unidentified

Element	Data Type	Max Length	Required?	Definition
				402: Moved 403: Voluntary Surrender Stip 404: Voluntary request 405: Cancel-Agent Request 406: Cancel-Computer Generated 407: Cancel-Housekeeping 408: Cancel-Moved from State 409: Cancel - Non Renewal 410: Cancel-No Appointments 411: Cancel- By Department 412: P2 Limited to Inland Marine 413: Entered in Error 414: Revocation Final 415: Agent Requested Termination 416: Manual Cancel 417: Internal Error Replace 418: License Class Increase 419: Address Change 420: License Class Change 421: Terminated Continuing Education 422: License Discontinued By Law 423: Cancel-Non Compliance CE Requirement 424: Voluntary Surrender of License

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Element	Data Type	Max Length	Required?	Definition
				• 425: License Request
				• 426: Licensee Closed Business
				• 427: Affiliation Withdrawn
				• 428: Converting to Agent License
				• 474: PA-Act147of2002
				• 475: SDB Data Conversion
				• NO_QUALS: Supporting Quals are Untracked

QualificationTermCodeEnumType

The **QualificationTermCodeEnumType** element provides code lookup values for state-specific license inactivation reasons. It is referred to by the InactivationReason child element in the Qualifications node.

Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.

Element	Data Type	Max Length	Required?	Definition
QualificationTermCodeEnumType	VARCHAR2	10	No	Code lookup values for state-specific qualification inactivation reasons. The string is restricted to one of the following enumerated values: • 001: Absent Parent

Element	Data Type	Max Length	Required?	Definition
				• 002: Activated in Error
				• 003: Bond Cancellation
				• 004: By Agent Request
				• 005: By Commissioner's Order
				• 006: Canceled
				• 007: Clearance Request
				• 008: Deceased
				• 009: Department of Insurance Employee
				• 010 : Dissolved
				• 011: Failure to Pay Child Support
				• 012: Failure to Renew
				• 013: Lapsed
				• 014: Merged
				• 015: Merger or Consolidation
				• 016: Moved out of State
				• 017: No Authorized Designee
				• 018: No Supporting Appointment
				• 019: Non Sufficient Funds
				• 020: Obtained Life, Accident and Health Qualification
				• 021: Obtained Property and Casualty Qualification
				• 022: Order to 023: Renewal Denied
				• 024: Revoked
				• 025: Surrendered in Lieu of Administration

Element	Data Type	Max Length	Required?	Definition
				• 026: Suspended
				• 027: Suspended for Compliance
				• 028: Suspended for Education
				• 029: Suspended by Commissioner's Order
				• 030: Tax Warrant
				• 031: Unknown
				• 032: Voluntary Terminate/CE Noncompliance
				• 033: Voluntary Surrender
				• 034: Voluntary Terminate by Consent
				• 035: Cancel Continuing Education
				• 036: Denial of License
				• 047: Renewal Pending
				• 048: Nonrenewal
				• 051: Cancel - non compliance CE
				• 052: Expired
				• 053: Grace Period
				• 054: Changed resident state
				• 055: Incomplete Conversion
				• 057: Cancelled - Individual Request
				• 058: License Denied
				• 059: License Denied - no response 060: Nonrenewal - insurer request
				• 061: Application Pending

Element	Data Type	Max Length	Required?	Definition
				062: Questionable Qualifications 063: Do Not Relicense 064: Canceled - Insurer Request 065: Cancelled - Agent Requested 066: Suspension Grace 067: CE Exempt Legislator 068: Terminated 069: Continuation fee not paid 070: Administrative Action 071: Cancelled License 072 : Reinstated 073: Administrative Termination 074: No license ever issued 075: Application Denied 076: No show for exam scheduled 077: Failed exam 078: Do not handle Workers Comp. 079: General Lines held open 080: Licensed / May have active appointment 081: Lost qualifications 082: Miscellaneous Reasons 083: Pending CE for workers comp 084: License application under review

Element	Data Type	Max Length	Required?	Definition
				• 085: Temp license app under review
				• 086: Awaiting CE verification
				• 087: Retired or moved out of state
				• 088: Pending Reinstatement
				• 089: License request withdrawn
				• 090: Surrendered - admin. Order
				• 091: Authorized for examination
				• 092 : License Terminated
				• 093: CE is now required
				• 094: Voluntarily canceled
				• 096: Failure to meet CE requirments
				• 097: Nonactive
				• 098: Non -continued
				• 099: Voluntary Non -renewal
				• 100: Probationary
				• 101: Amendment
				• 102: Transfer
				• 103: Refused
				• 104: Non compliance - CE
				• 105: Not Available
				• 106 : Name Change
				• 107: Pending
				• 108: Inactive

Element	Data Type	Max Length	Required?	Definition
				• 109: Administrative Action Dismissed
				• 110: Clearance Letter 137 : Normal
				• 138: Pending/In Process Application
				• 139: Receivership
				• 140: Rehabilitation
				• 141: Special Circumstances
				• 142: Suspended by Lack of Child Support
				• 143: Temporary License Expired
				• 144: Temporary Normal
				• 145: Terminated No Agents
				• 146: Terminated - Repeal of Regulatory Authority
				• 147: Terminated - No Appoinments over 60 days
				• 148: Voluntarily/not writing business
				• 149: Withdrawn
				• 178: Continuing Education Not Met
				• 191 : Cancelled by Commissioner
				• 221: Cancelled - by Department
				• 222: Cancelled - Computer Generated
				• 223: Cancelled - House Keeping
				• 224: Cancelled - Moved From State
				• 225: Cancelled - Non Renewal
				• 226 : Cancelled - No Appointments Requested
				• 111: Limited

Element	Data Type	Max Length	Required?	Definition
				• 112: Non -comply or Surrendered
				• 113: Nonresident
				• 114: Resident
				• 115: Action Pending
				• 116: Active
				• 117: Active Temp - No Appts
				• 118: Active Temp - No Regis Agents
				• 119 : Active - No Regis Agents
				• 120: Application Expired
				• 121: Application Merged to Existing License
				• 122: Approval Process
				• 123: Approved
				• 124: Cancelled by Agency
				• 125 : Cancelled by Agent
				• 126: Cancelled by Clearance Letter
				• 127: Cancelled by Company
				• 128: Cancelled CE Violation
				• 129: CE Suspended
				• 130: Conservatorship
				• 131 : Inactive Agent Status
				• 132: Liquidation
				• 133 : No Appointments
				• 134 : Non -Admitted Eligible

Element	Data Type	Max Length	Required?	Definition
				• 135 : Non -Admitted 227: Company Requested
				• 228: Housekeeping
				• 229: Pending Admission
				• 230: Pending Renewal
				• 231: Suspension of License
				• 232: Under Review
				• 233: Denied Admission
				• 234: Voluntary Withdrawal
				• 235: Initial Approval
				• 236: Pending Amendment
				• 237: Amendment Initial Approval
				• 238: DNU - Revoked
				• 239: DNU - Suspension
				• 240: Non -Mass
				• 241: Mass Adjuster
				• 242: Indefinitely Suspended
				• 243: Suspension Stayed
				• 244: Denied
				• 245 : Hold
				• 246: Unlicensed
				• 247: Void
				• 248: Locked Out
				• 249: Appointment Needed

Element	Data Type	Max Length	Required?	Definition
				• 250: Application Required
				• 253: General
				• 255: Other
				• 256: Suspended for Administrative Action
				• 257: Suspended - failure to meet CE
				• 258: No Company Appointment
				• 260: Suspended Active 261: Suspended Inactive
				• 262: Cease and Desist (Active)
				• 263: Cease and Desist (Inactive)
				• 264: Inactive (Deceased)
				• 265: Inactive - Law Change
				• 266: Excluding Auto Insurance, Auto Liability
				• 267: Excluding Auto Insurance and Physical Damage
				• 268 : Excluding Marine Coverages
				• 269: Excluding Mortgage and Financial
				• 270: Excluding Motor Vehicle Liability and Worker's Compensation
				• 271: Excluding Worker's Compensation
				• 272: HMO Only
				• 273: Limited to Title and Mortgage Guarantee, CCI, DGI,
				• 274: Limited to Mortgage Guarantee
				• 275: Limited to Reinsurance
				• 276: Denied License Request
				• 277: Limited to Workers Compensatn

Element	Data Type	Max Length	Required?	Definition
				• 278: P4 Limited to Reinsurance
				• 279: P7 Limited to Fidelity - Surety 28: No longer represents agency
				• 280: Restricted to Servicing Carrier
				• 281: Restricted to Write Only Worker's Compensation
				• 282: Restricted to Servicing Existing
				• 283: Servicing IRA Business
				• 284: Servicing Multi -State Accounts
				• 285: Surrendered with Prejudice
				• 286: Involuntary Cancel by Dept
				• 287: Licd Not Currently Appointed
				• 288: Commissioner's order
				• 289: Voluntary Surrender/Ecase Pend
				• 290: Pending License
				• 291: Expired Renewable
				• 292 Expired Non - renewable
				• 293: Probation -active
				• 295: Approved in Error
				• 296: Appointments
				• 297: Renewal Cancellation
				• 298: Request by insurer
				• 299: Sent Back
				• 300: Temporary
				• 301: Licensed

Element	Data Type	Max Length	Required?	Definition
				• 302: Terminated - Non Resident
				• 303: Surrendered Voluntarily
				• 304: Administratively Terminated
				• 305: Admin Terminated for CE
				• 306 : Converted
				• 307: Exempt
				• 308 : Application Withdrawn
				• 309: Not Applicable
				• 310 : Additional Info needed
				• 311 : Exists on Legal DB
				• 312: RIRS Exists
				• 313: Cancelled For Cause
				• 314: Company Indebtness
				• 315: Company Defunct or Liquidation
				• 316: Company Merger
				• 317: Inadequate
				• 318: Voluntary Surrender Per Agent Request
				• 319: Suspended/Surrendered
				• 320: Data Conversion
				• 321: Surrendered License
				• 322: Active License
				• 323: Administrative
				• 324: Appointment Lapsed

Element	Data Type	Max Length	Required?	Definition
				• 325: Bail Lic Suspended
				• 326: Bank / Bank Owned
				• 327: Bond Amount Increased
				• 328: Bond Cancelled By Carrier
				• 329: Bond Carrier Out of Business
				• 330: By Commissioner
				• 331: Cancel - non compliance Financial
				• 332: Canceled - History
				• 333: Cancel - non compliance department regulation
				• 334: Cancelled -Agency Request
				• 335: Cease and Desist
				• 336: Changed to Agent
				• 337: Changed to Broker
				• 338: Changed to Solicitor
				• 339: Company decision/for cause
				• 340: Complaint
				• 341: Confidential Comment
				• 342: Department Cancelled
				• 343: Designation Withdrawn
				• 344: Do Not Renew
				• 345: Duplicate License
				• 346: Exam passed- permanent license
				• 347: Exempt CE - IEAC

Element	Data Type	Max Length	Required?	Definition
				• 348: Exempt from Cont Ed
				• 349: Expire - temporary license time limit
				• 350 : Expired Broker
				• 351: Expired Surplus Line
				• 352: Failure to Pay
				• 353: File Closed
				• 354: Fined 355: Information
				• 356: Insufficient Funds
				• 357 : Insurer appointment not renewed
				• 358: Insurer terminated
				• 359: Invalid Address
				• 360: Involuntary surrender
				• 361: Issued License
				• 362: License Denied Renewal
				• 363: License is not Renewed
				• 364: Medical Ex Cont Ed
				• 365: No Active Appointments
				• 366: No Active Appointments/Designation
				• 367: No Active Licenses
				• 368: No Active Sponsorship
				• 369 : No Active Design to sustain License
				• 370: No Bond
				• 371: No Bond to Secure Appointment

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Element	Data Type	Max Length	Required?	Definition
				• 372: Not Renewed
				• 373: Outstanding Fine
				• 374: Preserve Fee
				• 375: Preserve Residency
				• 376 : Qualification Expired
				• 377: Reciprocal agreement- cancel
				• 378: Renewal Fee not paid
				• 379: Renewal Refused by DOI
				• 380: Renewed Surplus Lines
				• 381: Reporting Forms
				• 382 : Returned License
				• 383: Revoked - Life and Health
				• 384: Revoked - Property and Casualty
				• 385: Revoked - multiple times
				• 386: Revoked by Order
				• 387: Revoked for Cause
				• 388: Revoked/Outstng Fine
				• 389: See Comments
				• 390: Similar Name
				• 391: Stop Payment
				• 392: Summary Suspension
				• 393: Surrender of Limited License
				• 394: Suspended and Outstanding Fine

Element	Data Type	Max Length	Required?	Definition
				• 395: Suspended - Life and Health
				• 396: Suspended - Prop and Cas
				• 397: Suspended Legal
				• 398: Temporary License
				• 399: Terminated License
				• 400: Two Diff Type Lic
				• 401: Unidentified
				• 402: Moved
				• 403: Voluntary Surrender Stip
				• 404: Voluntary request
				• 405: Cancel - Agent Request
				• 406: Cancel - Computer Generated
				• 407: Cancel - Housekeeping
				• 408: Cancel - Moved from State
				• 409: Cancel - Non Renewal
				• 410: Cancel - No Appointments
				• 411: Cancel - By Department
				• 412: P2 Limited to Inland Marine
				• 413: Entered in Error
				• 414: Revocation Final
				• 415: Agent Requested Termination
				• 416: Manual Cancel
				• 417: Internal Error Replace

Element	Data Type	Max Length	Required?	Definition
				• 418: License Class Increase
				• 419: Address Change
				• 420: License Class Change
				• 421: Terminated Continuing Education
				• 422: License Discontinued By Law
				• 423: Cancel - NonCompliance CE Requirement
				• 424: Voluntary Surrender of License
				• 425: License Request
				• 426: Licensee Closed Business
				• 427: Affiliation Withdrawn
				• 428: Converting to Agent License 474: PA - Act 147 of 2002
				• 475 : SDB Data Conversion

AppointmentTermCodeEnumType

The AppointmentTermCodeEnumType element provides code lookup values for state-specific appointment termination reasons. It is referred to by the TerminationReason child element in the Appointment and County node.

Note: When you are mapping data from the OBDF export file to your company's internal systems, we strongly recommend mapping to the codes, not the descriptions.

Element	Data Type	Max Length	Required?	Definition
AppointmentTermCodeEnumType	VARCHAR2	10	No	Code lookup values for state-specific appointment termination reasons. The string is restricted to one of the following enumerated values: • 01: Voluntary Termination • 02: Inadequate Production • 03: Canceled by General Agent • 04: Death • 05: Company Defunct or Liquidation • 06: Company Indebtedness • 07: Forgery • 08: Altering Policies • 09: Fraud • 10: Misappropriation • 100: Absent Parent • 101: Action Pending • 102: Activated in Error • 103: Active • 104: Active No Regis Agents • 105: Active License • 106: Active Temp No Appts • 107: Active Temp No Regis Agents • 108 : Additional Info needed • 109: Address Change • 11 : Misrepresentation

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Element	Data Type	Max Length	Required?	Definition
				• 110: Admin Terminated for CE
				• 111: Administrative Action Dismissed
				• 112: Administrative
				• 113: Administrative Action
				• 114:Administrative Termination
				• 115: Administratively Terminated
				• 116: Affiliation Withdrawn
				• 117: Agent Requested Termination
				• 118: Amendment
				• 119: Amendment Initial Approval
				• 12: Failure to Submit Applications or Premiums
				• 120: Application Merged to Existing License
				• 121: Application Denied
				• 122: Application Expired
				• 123: Application Pending
				• 124: Application Required
				• 125: Application Withdrawn
				• 126: Appointment Lapsed
				• 127: Appointment Needed
				• 128: Appointments
				• 129: Approval Process
				• 13: Poor Policyholder Service
				• 130: Approved

Element	Data Type	Max Length	Required?	Definition
				- 131: Approved in Error
				- 132: Authorized for examination
				- 133: Awaiting CE verification
				- 134: Bail Lic Suspended
				- 135: Bank / Bank Owned
				- 136: Bond Amount Increased
				- 137: Bond Cancellation
				- 138: Bond Cancelled By Carrier
				- 139: Bond Carrier Out of Business
				- 14: Other
				- 140: By Agent Request
				- 141: By Commissioner
				- 142: By Commissioner's Order
				- 143: Cancel Agent Request
				- 144: Cancel By Department
				- 145: Cancel Computer Generated
				- 146: Cancel Housekeeping
				- 147: Cancel Moved from State
				- 148: Cancel No Appointments
				- 149: Cancel non compliance CE
				- 15: Agent Moved
				- 150: Cancel non compliance department regulation
				- 151: Cancel Non Renewal

Element	Data Type	Max Length	Required?	Definition
				• 152: Cancel NonCompliance CE Requirement
				• 153: Cancel Continuing Education
				• 154: Cancel - non compliance Financial
				• 155: Canceled
				• 156: Canceled History
				• 157: Canceled Insurer Request
				• 158: Cancelled Agent Requested
				• 159: Cancelled by Department
				• 16: Agent Misrepresented Policy
				• 160: Cancelled Computer Generated
				• 161: Cancelled House Keeping
				• 162: Cancelled Individual Request
				• 163: Cancelled Moved From State
				• 164: Cancelled No Appointments
				• 165: Cancelled Non Renewal
				• 166: Cancelled by Agency
				• 167: Cancelled by Agent
				• 168: Cancelled by Clearance Letter
				• 169: Cancelled by Commissioner
				• 17: Appointed in Error
				• 170: Cancelled by Company
				• 171: Cancelled CE Violation
				• 172: Canceled for Cause

Element	Data Type	Max Length	Required?	Definition
				• 173: Canceled License
				• 174: Cancelled -Agency Request
				• 175: CE Exempt Legislator
				• 176: CE is now required
				• 177: CE Suspended
				• 178: Cease and Desist
				• 179: Cease & Desist (Active)
				• 18: Request Regulatory Review
				• 180: Cease & Desist (Inactive)
				• 181: Changed resident state
				• 182: Changed to Agent
				• 183: Changed to Broker
				• 184: Changed to Solicitor
				• 185: Clearance Letter Requested
				• 186: Clearance Request
				• 187: Commissioner's order
				• 188: Company decision/for cause
				• 189: Company Indebtness
				• 19: Discharged
				• 190: Company Merger
				• 191: Company Requested
				• 192: Complaint
				• 193: Confidential Comment

Element	Data Type	Max Length	Required?	Definition
				• 194: Conservatorship
				• 195: Continuation fee not paid
				• 196: Continuing Education Not Met
				• 197: Converted
				• 198: Converting to Agent License
				• 199: Data Conversion
				• 20: Possible Unlawful Activity
				• 200: Denial of License
				• 201: Denied
				• 202: Denied Admission
				• 203: Denied License Request
				• 204: Department Cancelled
				• 205: Department of Insurance Employee
				• 206: Designation Withdrawn
				• 207: Dissolved
				• 208: DNU Revoked
				• 209: DNU Suspension
				• 21: Permitted to Resign
				• 210: Do not handle Workers Comp.
				• 211: Do Not Relicense
				• 212: Do Not Renew
				• 213: Duplicate License
				• 214: Entered in Error

Element	Data Type	Max Length	Required?	Definition
				• 215: Exam passed permanent license
				• 216: Excluding Mortgage and Financial
				• 217: Excluding Auto Insurance and Physical Damage
				• 218 : Excluding Auto Insurance, Auto Liability
				• 219: Excluding Marine Coverages
				• 22: Low Production
				• 220: Excluding Motor Vehicle Liability and Worker's Compensation
				• 221: Excluding Worker's Compensation
				• 222: Exempt
				• 223: Exempt CE IEAC
				• 224: Exempt from Cont Ed
				• 225: Exists on Legal DB
				• 226: Expire temporary license time limit
				• 227: Expired
				• 228: Expired Broker
				• 229: Expired Non-renewable
				• 23: Licensee's Request
				• 230: Expired Renewable
				• 231: Expired Surplus Line
				• 232: Failed exam
				• 233: Failure to meet CE requirements
				• 234: Failure to Pay
				• 235: Failure to Pay Child Support

Element	Data Type	Max Length	Required?	Definition
				• 236: Failure to Renew
				• 237: File Closed
				• 238: Fine imposed
				• 239: General
				• 24: Moved out of Florida
				• 240: General Lines held open
				• 241: Grace Period
				• 242: HMO Only
				• 243: Hold
				• 244: Housekeeping
				• 245: Inactive
				• 246: Inactive - Law Change
				• 247: Inactive (Deceased)
				• 248: Inactive Agent Status
				• 249: Inadequate
				• 25: Resigned/Retired
				• 250: Incomplete Conversion
				• 251: Indefinitely Suspended
				• 252: Information
				• 253: Initial Approval
				• 254: Insufficient Funds
				• 255: Insurer appointment not renewed
				• 256: Insurer terminated

Element	Data Type	Max Length	Required?	Definition
				• 257: Internal Error Replace
				• 258: Invalid address
				• 259: Involuntary Cancel by Dept
				• 26 : Company not doing business in Florida
				• 260: Involuntary Surrender
				• 261: Issued License
				• 262: Lapsed
				• 263: Licd Not Currently Appointed
				• 264: License application under review
				• 265: License Class Change
				• 266: License Class Increase
				• 267: License Denied
				• 268: License Denied no response
				• 269: License Denied Renewal
				• 27: No longer represents Company
				• 270: License Discontinued By Law
				• 271: License is not Renewed
				• 272: License Request
				• 273: License request withdrawn
				• 274: License Terminated
				• 275: Licensed
				• 276: Licensed / May have active appointment
				• 277: Licensee Closed Business

Element	Data Type	Max Length	Required?	Definition
				• 278: Limited
				• 279: Limited to Mortgage Guarantee
				• 28: No longer represents Agency
				• 280: Limited to Reinsurance
				• 281: Limited to T and MG, CCI, DGI,
				• 282: Limited to Workers Compensation
				• 283: Liquidation
				• 284: Locked Out
				• 285: Lost qualifications
				• 286: Manual Cancel
				• 287: Mass Adjuster
				• 288: Medical Ex Cont Ed
				• 289: Merged
				• 29: Contract Cancelled or Terminated
				• 290: Merger or Consolidation
				• 291: Miscellaneous Reasons
				• 292: Moved
				• 293: Moved out of State
				• 294: Name Change
				• 295: No Active Appointments
				• 296: No Active Appointments/Designation
				• 297: No Active Licenses
				• 298: No Active Sponsorship

Element	Data Type	Max Length	Required?	Definition
				299: No Active Design to sustain License 30: Company decision 300: No Appointments 301: No Authorized Designee 302 No Bond 303: No Bond to Secure Appointment 304: No Company Appointment 305: No license ever issued 306: No show for exam scheduled 307: No Supporting Appointment 308: Non compliance CE 309: Non Sufficient Funds 31: Alleged violation of Florida statutes 310: Nonactive 311: Non -Admitted Eligible 312: Non -Admitted Intelligible 313: Non -comply or Surrendered 314: Non -continued 315: Non -Mass 316: Nonrenewal 317: Nonrenewal insurer request 318: Nonresident 319: Normal

Element	Data Type	Max Length	Required?	Definition
				• 32: Insurer No Longer in Business
				• 320: Not Applicable
				• 321: Not Available
				• 322: Not Renewed
				• 323: Obtained Life, Accident and Health Qualification
				• 324: Obtained Property and Casualty Qualification
				• 325: Order to Show Cause
				• 326: Outstanding Fine
				• 327: P2 Limited to Inland Marine
				• 328: P4 Limited to Reinsurance
				• 329: P7 Limitd to Fidelity- Surety
				• 33: Agent Debit Balance
				• 330: Pending
				• 331: Pending Admission
				• 332: Pending Amendment
				• 333: Pending CE for workers comp
				• 334: Pending License
				• 335: Pending Reinstatement
				• 336: Pending Renewal
				• 337: Pending/In Process Application
				• 338: Preserve Fee
				• 339: Preserve Residency
				• 34: Untrue information on application

Element	Data Type	Max Length	Required?	Definition
				• 340: Probation -active
				• 341: Probationary
				• 342: Qualification Expired
				• 343: Questionable Qualifications
				• 344: Receivership
				• 345: Reciprocal agreement cancel
				• 346: Refused
				• 347: Rehabilitation
				• 348: Reinstated
				• 349: Renewal Denied
				• 35: Violated any insurance law
				• 350: Renewal Fee not paid
				• 351: Renewal Pending
				• 352: Renewal Refused by DOI
				• 351: Renewed Surplus Lines
				• 354: Reporting Forms
				• 355: Request by insurer
				• 356: Resident
				• 357: Restrictd to Servicing Carrier
				• 358: Restrictd to Servicing Existng
				• 359: Restrictd to Write Only W/C
				• 36: License through misrepresentation
				• 360: Retired or moved out of state

Element	Data Type	Max Length	Required?	Definition
				• 361: Returned License
				• 362: Revocation Final
				• 363: Revoked
				• 364: Revoked Life and Health
				• 365: Revoked multiple times
				• 366: Revoked Property and Casualty
				• 367: Revoked by Order
				• 368: Revoked for Cause
				• 369: Revoked/Outstng Fine
				• 37: Money improperly held
				• 370: RIRS Exists
				• 371: See Comments
				• 372: Sent Back
				• 373: Servicing IRA Business
				• 374: Servicing Multi-State Accounts
				• 375: Similar Name
				• 376: Special Circumstances
				• 377: Stop Payment
				• 378: Summary Suspension
				• 379: Surrender of Limited License
				• 38: Misrepresentation of terms of policy
				• 380: Surrendered admin. Order
				• 381: Surrendered in Lieu of Administrator

Element	Data Type	Max Length	Required?	Definition
				• 382: Surrendered License
				• 383: Surrendered Voluntarily
				• 384: Surrendered with Prejudice
				• 385: Suspd & Outstng Fine
				• 386: Suspended
				• 387: Suspended by Lack of Child Support
				• 388: Suspended failure to meet CE
				• 389: Suspended Life and Health
				• 39: Conviction of felony
				• 390: Suspended Property and Casualty
				• 391: Suspended Active
				• 392: Suspended for admin. Action
				• 393: Suspended for Compliance
				• 394: Suspended for Education
				• 395: Suspended Inactive
				• 396: Suspended Legal
				• 397: Suspended/Surrendered
				• 398: Suspended -Commissioner's Order
				• 399: Suspension Grace
				• 40: Fraudulent practices
				• 400: Suspended License
				• 401: Suspension Stayed
				• 402: Tax Warrant

Element	Data Type	Max Length	Required?	Definition
				• 403: Temp license app under review
				• 404: Temporary
				• 405: Temporary License Expired
				• 406: Temporary Normal
				• 407: Temporary License
				• 408: Terminated
				• 409: Terminated Non Resident
				• 41: Incompetent, Untrustworthy, Financially Irresponsible
				• 410: Terminated Continuing Education
				• 411: Terminated License
				• 412: Terminated No Agents
				• 413: Terminated No Appoinments over 60 days
				• 414: Terminated Repeal of Regulatory Authority
				• 415: Transfer
				• 416: Two Diff Type Lic
				• 417: Under Review
				• 418: Unidentified
				• 419: Unknown
				• 42: Injury to public
				• 420: Unlicensed
				• 421: Void
				• 422: Voluntary Terminate/CE Noncompliance
				• 423: Voluntarily canceled

Element	Data Type	Max Length	Required?	Definition
				• 424: Voluntarily/not writing business
				• 425: Voluntary Non -renewal
				• 426: Voluntary request
				• 427: Voluntary Surrender
				• 428: Voluntary Surrender of License
				• 429: Voluntary Surrender Stip
				• 43: Other insurance license revoked
				• 430: Voluntary Surrender/Ecase Pend
				• 431: Voluntary Surrender per Agent Request
				• 432: Voluntary Terminate by Consent
				• 433: Voluntary Withdrawal
				• 434: Withdrawn
				• 435: Accounting for Appls or Premiums
				• 436: Agent Request/Mutual Consent
				• 437: Canceled at Licensee's Request
				• 438: Canceled at Renewal
				• 44: License surrendered
				• 441: Court/regulatory action for list above
				• 442: Does not process appointments
				• 443: Doesn't Appoint By LOA
				• 444: Felony
				• 445: General agent's request
				• 446: Has complaint on file

Element	Data Type	Max Length	Required?	Definition
				• 447: Holds limited license
				• 448: Invalid License Number
				• 449: License Application Denied
				• 45: Forged documents
				• 450: License for controlled business
				• 451: License loss/suspended in other state
				• 453: Misdemeanor as agent.
				• 455: Misrepresentation at licensing
				• 456: Misrepresented policies
				• 458: Moved out of Louisiana
				• 459: Need LOC
				• 46: Cheating on exam
				• 460: Not licensed
				• 461: Other Provide Reason
				• 462: Other Causes
				• 463: Other Reason
				• 464: Other, please state.
				• 465: Premiums not accounted
				• 466: Revoked License
				• 467: State Denied
				• 468: Supporting License/Qualification Inactivated
				• 469: Term not requested through PIN
				• 47: Business accepted from unlicensed person

Element	Data Type	Max Length	Required?	Definition
				• 470: Trustworthiness or competence
				• 471: Unfair trade practices/fraud
				• 472: Unfair/deceptive practices.
				• 473: Transaction Validation Failed
				• 474: PA Act 147 of 2002
				• 48: Failure to Pay Child Support
				• 49: Failure to pay income tax
				• 50: Misdemeanors more than $300
				• 51: Conviction of misdemeanors
				• 52: Fail to meet stat requirement for license
				• 53: Court or Regulatory Action for Activities
				• 54: Cancel
				• 55: Cancel for Cause
				• 56: By Mutual Agreement of Company and Agent/Solicitor
				• 57: Because Agent/Solicitor was chiefly writing insurance on his own life, property, or liability, or on the lives, property, or liability or his associates.
				• 58: Because the Agent/Solicitor was making false statements or representations on application submitted to the company
				• 59: Because the Agent/Solicitor has converted to his own use moneys belonging to the company, without prior consent of the company.
				• 60: Cancel Deceased
				• 61: Cancel Other
				• 62: Incompetence

Element	Data Type	Max Length	Required?	Definition
				• 63: Rebating
				• 64: Untrustworthiness
				• 65: Agent's Request
				• 66: Company Action
				• 67: Mutual agreement
				• 68: High Loss Ratio
				• 69: Abandonment of Agent/Broker
				• 70: Deceased
				• 71: Agent Deceased
				• 72: For Cause
				• 73: Insufficient Production
				• 74: Violated any insurance law or any lawful rule, regulation, or order of the Commisioner.
				• 75: Improperly withheld, misappropriated, or converted to his own use any money received in the course of business and belonging to policyholders, insurers, beneficiaries, or others.
				• 76: Misrepresented the terms of any existing or proposed insurance contract to the detriment of the applicant or insured
				• 77: Engaged in any pattern of unfair method of competition or unfair or deceptive acts or practices in the business or insurance as defined in the Unfair Trade Practices Act.
				• 78: Forged another person's name to an application for insurance or to any other document or fraudulently procured a forged signature to an insurance application or any other document, knowing such signature to be forged.
				• 79: Knowingly and willingly made or permitted a false or fraudulent statement or misrepresentation in or relative to an application for a

Element	Data Type	Max Length	Required?	Definition
				policy of insurance.
				• 80: Been convicted of or pleaded nolo contendere to any felony.
				• 81: Been convicted of or pleaded nolo contendere to a misdemeanor in connection with his activities as an agent.
				• 82: Obtained the license for the purpose of writing controlled business.
				• 83: Had an agent's or broker's license suspended or revoked in any other state, district, or territory of the United States or any province or Canada.
				• 84: Not demonstrated trustworthiness and competency in his activities as an agent.
				• 85: Obtained the license through misrepresentation, fraud, or any other act for which issuance of the license could have been refused had it been known to the Commissioner at the time of issuance.
				• 86: Financially irresponsible
				• 87: Misrepresented applications
				• 88: Misused money received
				• 89: Twisting
				• 90: Lack of Production
				• 91: Per Agent's Contract
				• 92: SDB Data Conversion
				• 999: Request Aborted Due to BI

StateProvinceCodeEnumType

The **StateProvinceCodeEnumType** element provides code lookup values for U.S. state, district, or territory or Canadian province name abbreviations. It is referred to by the following elements:

- The State child element of the Association element, itself a child element of the FirmAssociations and IndividualAssociations nodes

- The State child element of the StateProducerNumber element, itself a child element of the StateProducerNumbers node

- The State child element of the Alias node, itself a child element of the Aliases node

- The State child element of the ResidentState, node, itself a child element of the ResidentStates node

Element	Data Type	Max Length	Required?	Definition
StateProvinceCodeEnumType	VARCHAR2	10	No	Code lookup values representing U.S. states, districts, or territories or Canadian province or territories. The string is restricted to one of the following enumerated values: • AA: Armed Forces America • AB: Alberta • AE: Armed Forces Europe • AK: Alaska • AL: Alabama • AP: Armed Forces Pacific • AR: Arkansas • AS: American Samoa • AZ: Arizona • BC: British Columbia • CA: California • CO: Colorado • CT: Connecticut

Element	Data Type	Max Length	Required?	Definition
				• DC: District of Columbia
				• DE: Delaware
				• FL: Florida
				• GA: Georgia
				• GU: Guam
				• HI: Hawaii
				• IA: Iowa
				• ID: Idaho
				• IL: Illinois
				• IN: Indiana
				• KS: Kansas
				• KY: Kentucky
				• LA: Louisiana
				• MA: Massachusetts
				• MB: Manitoba
				• MD: Maryland
				• ME: Maine
				• MI: Michigan
				• MN: Minnesota
				• MO: Missouri
				• MS: Mississippi
				• MT: Montana
				• NB: New Brunswick
				• NC: North Carolina

Element	Data Type	Max Length	Required?	Definition
				• ND: North Dakota
				• NE: Nebraska
				• NF: Newfoundland
				• NH: New Hampshire
				• NJ: New Jersey
				• NL: New Labrador
				• NM: New Mexico
				• NS: Nova Scotia
				• NT: Northwest Territories
				• NU: Nunavut
				• NV: Nevada
				• NY: New York
				• OH: Ohio
				• OK: Oklahoma
				• ON: Ontario
				• OR: Oregon
				• PA: Pennsylvania
				• PE: Prince Edward Island
				• PQ: Province du Quebec
				• PR: Puerto Rico
				• QC: Quebec
				• RI: Rhode Island
				• SC: South Carolina
				• SD: South Dakota

Element	Data Type	Max Length	Required?	Definition
				• SK : Saskatchewan
				• TN: Tennessee
				• TX: Texas
				• UT: Utah
				• VA: Virginia
				• VI: U.S. Virgin Islands
				• VT: Vermont
				• WI: Wisconsin
				• WV: West Virginia
				• WY: Wyoming
				• YT: Yukon Territory

StateCodeEnumType

The **ApplicationStateCodeEnumType** element provides code lookup values for U.S. state or district name abbreviations. It is referred to by numerous elements.

Element	Data Type	Max Length	Required?	Definition
ApplicationStateCodeEnumType	VARCHAR2	10	No	Code lookup values representing U.S. states or districts. The string is restricted to one of the following enumerated values: • AK: Alaska • AL: Alabama • AR: Arkansas

Element	Data Type	Max Length	Required?	Definition
				• AZ: Arizona
				• CA: California
				• CO: Colorado
				• CT: Connecticut
				• DC: District of Columbia
				• DE: Delaware
				• FL: Florida
				• GA: Georgia
				• HI: Hawaii
				• IA: Iowa
				• ID: Idaho
				• IL: Illinois
				• IN: Indiana
				• KS: Kansas
				• KY: Kentucky
				• LA: Louisiana
				• MA: Massachusetts
				• MD: Maryland
				• ME: Maine
				• MI: Michigan
				• MN: Minnesota
				• MO: Missouri
				• MP: Northern Mariana Islands
				• MS: Mississippi

Element	Data Type	Max Length	Required?	Definition
				• MT: Montana
				• NC: North Carolina
				• ND: North Dakota
				• NE: Nebraska
				• NH: New Hampshire
				• NJ: New Jersey
				• NM: New Mexico
				• NV: Nevada
				• NY: New York
				• OH: Ohio
				• OK: Oklahoma
				• OR: Oregon
				• PA: Pennsylvania
				• RI: Rhode Island
				• SC: South Carolina
				• SD: South Dakota
				• TN: Tennessee
				• TX: Texas
				• UT: Utah
				• VA: Virginia
				• VT: Vermont
				• WI: Wisconsin
				• WV: West Virginia
				• WY: Wyoming

CountyCodeEnumType

The **CountyCodeEnumType** element provides code lookup values for Florida counties. It is referred to by the following elements:

- The ResidentCounty child element of the Appointment element, itself a child element of the Appointments node.

- The CountyName child element of the County element, a child element of the Counties element, itself a child element of the Appointments node.

Element	Data Type	Max Length	Required?	Definition
CountyCodeEnumType	VARCHAR2	10	No	Code lookup values representing Florida counties. Valid values: 01: Dade 02: Duval 03: Hillsborough 04: Pinellas 05: Polk 06: Palm Beach 07: Orange 08: Volusia 09: Escambia 10: Broward 11: Alachua 12: Lake 13: Leon 14: Marion 15: Manatee 16: Sarasota

Element	Data Type	Max Length	Required?	Definition
				• 17: Seminole
				• 18: Lee
				• 19: Brevard
				• 20: St. Johns
				• 21: Gadsden
				• 22: Putnam
				• 23: Bay
				• 24: St. Lucie
				• 25: Jackson
				• 26: Osceola
				• 27: Highlands
				• 28: Pasco
				• 29: Columbia
				• 30: Hardee
				• 31: Suwannee
				• 32: Indian River
				• 33: Santa Rosa
				• 34: De Soto
				• 35: Madison
				• 36: Walton
				• 37: Taylor
				• 38: Monroe
				• 39: Levy
				• 40: Hernando

Element	Data Type	Max Length	Required?	Definition
				• 41: Nassau
				• 42: Martin
				• 43: Okaloosa
				• 44: Sumter
				• 45: Bradford
				• 46: Jefferson
				• 47: Citrus
				• 48: Clay
				• 49: Hendry
				• 50: Washington
				• 51: Holmes
				• 52: Baker
				• 53: Charlotte
				• 54: Dixie
				• 55: Gilchrist
				• 56: Hamilton
				• 57: Okeechobee
				• 58: Calhoun
				• 59: Franklin
				• 60: Glades
				• 61: Flagler
				• 62: Lafayette
				• 63: Union
				• 64: Collier

Element	Data Type	Max Length	Required?	Definition
				• 65: Wakulla • 66: Gulf • 67: Liberty • 99: - All 67 Counties

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Document Change History

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Version Number	Date	Version Information	Notes
V1-6	08/18//2010	Original - Producer Manager Outbound Data Feed Integration Guide_v1-6.docx	
7.4	10/30/2015	Wholesale reorganization and re-writing, writing of new content, and updating of existing content. Reformatted to comply with current Vertafore user documentation template. Updated version number to comply with current Sircon Platform (Producer Manager) release number.	DOC-1027 (Mark Nowlin)
7.4.1	11/10/2015	Changes based on editorial and technical review.	
7.4.2	02/03/2016	Enhanced definition of TrackingIdentifer.	
7.4.3	02/08/2016	Added missing code domain values for individual and firm producer status elements	
7.7	08/12/2016	Minor textual changes	
7.8	12/12/2016	Updates to support Optional SSN	DOC-1185