PLM User Guide



A Guide to Using the "Carrier Requests" Appointment Type in PLM May 2012 | Version 6.0



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Overview

Many carrier customers need to be able to record that a carrier appointing company has authorized a licensed producer to represent a particular line of business in a state, even if the state insurance department does not require a state-acknowledged appointment for that line. It is especially important for customers with systems integrated with PLM that depend on PLM appointment data to trigger certain activities, such as issuing sales commissions.

For this reason, for certain state licenses that do not require a regulated producer appointment you can add a special, internal use-only appointment to a producer's record in PLM.

Once recorded, the "Carrier Requests" appointment type can be reported against and will display in the results of Producer Manager appointment inquiries. You can run a report to tell which producers are authorized to represent a particular product type in a state.

Also, it will be included in a producer's appointment data in the Outbound Data Feed and other PLM integration points, ready to update your company's internal systems that are downstream from PLM.

DISCLAIMER: It's important to understand that the "Carrier Requests" appointment type is "placeholder" data in PLM and not a producer appointment by any other definition used in PLM. It was developed to give carrier customers a method to signify that a producer is authorized to represent a line of business under a specific state license, where otherwise such a method would not exist or be available in PLM. So, unless your company's licensing staff fully understands the meaning and purpose of the "Carrier Requests" appointment and the way it is used in PLM, it can possibly lead to recordkeeping errors and possible compliance issues.

This document is intended as a best practice guide for adding and maintaining the internal-use, "Carrier Requests" appointment type in PLM.



Setting Up PLM to Use the "Carrier Requests" Appointment Type

To get started using and working with the "Carrier Requests" appointment type, simply contact your Vertafore support representative. Let your representative know that you would like the "Carrier Requests" or "Internal Use Only" appointment type configured in your company's instance of PLM.

However, beforehand, we recommend that you first analyze your company's current business practices and requirements. If you can answer "yes" to the following questions, then your company may be able to use the "Carrier Requests" appointment type most effectively:

- Your company has a commissions, new business, or ERP system downstream from PLM that relies on producer appointment or authorization data from PLM to trigger actions in these systems
- Your company compiles reports of producers who are authorized to represent certain lines of business in certain states, even if the producers do not hold state-verified appointments
- Your company's licensing staff has a basic understanding of state license, license line (LOA), and appointment regulations for individual and firm insurance producers
- Your company's licensing staff is experienced and competent using PLM components and has a working understanding of the difference in the system among a state-verified, record-only, or internal use-only appointment, as they relate to producer compliance

After you have decided to use the "Carrier Requests" appointment type and contacted your Vertafore representative, Vertafore staff will perform the following updates of your company's configuration of PLM:

 Vertafore regulatory and compliance services staff will enable the Carrier Requests code (appointment type code: 999) in your company's instance of PLM. The code will be available for selection with the state and appointing company combinations configured in Producer Manager's company data. (See next bullet point.)

> Once the code has been configured, you will be able to see it using the **Code Use Indicators** page in Producer Manager (*Administration menu>Configure System>View Code*

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	08-01-2011		AL	System Appointment Type Code	999	Carrier Requests	On	
	08-01-2011		AR	System Appointment Type Code	999	Carrier Requests	On	
	08-01-2011		AS	System Appointment Type Code	999	Carrier Requests	On	
	08-01-2011		AZ	System Appointment Type Code	999	Carrier Requests	On	
	08-01-2011		CA	System Appointment Type Code	999	Carrier Requests	On	
	08-01-2011		CO	System Appointment Type Code	999	Carrier Requests	On	
	08-01-2011		CT	System Appointment Type Code	999	Carrier Requests	On	
	08-01-2011		DC	System Appointment Type Code	999	Carrier Requests	On	
	08-01-2011		DE	System Appointment Type Code	999	Carrier Requests	On	
	08-01-2011		FL	System Appointment Type Code	999	Carrier Requests	On	
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	08-01-2011		MA	System Appointment Type Code	999	Carrier Requests	On	
	08-01-2011		MD	System Appointment Type Code	999	Carrier Requests	On	
	08-01-2011		ME	System Appointment Type Code	999	Carrier Requests	On	
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Use Indicators), as shown at right.



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In Producer Manager, you must update the State Appointment **Details** sections in the records of all appointing companies that will be using the "Carrier Requests" appointment type. Simply add the "Carrier Requests" appointment type to the list of available appointment types in each desired state. (For more information, consult the Producer Manager online help.)

Once the updates are made, on the **Review/Update Company** page you will be able to review which of your carrier group's appointing companies are configured to use the "Carrier Requests" appointment and in which states (*Company*

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Contact Information							
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Alaska	Active	01-01-19	00 592		Montana	a, Deborah	Edit
American Samoa	Active	01-01-19			Montana	a, Deborah	
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Appointment Typ	e	Status	Suspend Nev	w Appts Start Date	End Date	Company/License Num	iber
Bail Enforcement		Active		01-01-1900			Terminate
Bail Soliciting		Active		01-01-1900			Terminate
Burial Burial Second		Active		01-01-1900			Terminate
Carrier Requests		Active		07-07-2011			Terminate
 Credit Life, Accident & Health 	n	Active		01-01-1900			Terminate
☑ Credit Property		Active		01-01-1900			Terminate
 General Agent - A&H (Life) 		Active		01-01-1900			Terminate
General Agent - A&H (P&C)		Active		01-01-1900			Terminate
General Agent - Burial		Active		01-01-1900			Terminate
General Agt - Credit LAH		Active		01-01-1900			Terminate
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Available Appointment Types					5-10-4	Add	New Appointment Ty
E Carrier Requests	e	Active	Suspend New	Appts Start Date 07-07-2011	End Date	Company/License Numbe	r Terminate
Doesn't Appoint By LOA		Active		01-01-1900			Terminate
Limited Accident & Health		Active		01-01-1900			Terminate
Elimited Cargo		Activo		01-01-1900			Terminate
Limited Excess Liability		Activo		01-01-1900			Terminate
Limited Excess Liability		Activo		01-01-1900			Terminate
Limited Personal Ellecto		Activo		01-01-1900			Terminate
Appointing Authorities		Active		01-01-1300		Add No.	Terminate w Appointing Authori
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Credit Accident and Health		Active		01-01-1900			Terminate
		Active		01-01-1900			Terminate
Doesn't Appoint By LOA		Active		01-01-1900			Terminate
Life and A&S (Res only)		Active		01-01-1900			Terminate
Life and PC (Res only)		Active		01-01-1900			Terminate

menu>Review/Update Company>select appointing company>view State Appointment Details), as shown at right.

Note: As a Managed Services engagement, Vertafore support staff can execute a script that will automatically update the appointment type data for the appointing companies in your carrier group that will be using the "Carrier Requests" appointment type. For more information, contact your Vertafore representative.



 If your company is using the PLM
 Producer Express
 component to
 onboard new
 producers, perform
 maintenance
 transactions, or
 process bulk
 appointment or
 termination
 requests, Vertafore
 support staff can

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374	VI	AGY	101	557276	Insurance Company	140	Life, Accident and Health	ELECTRONIC
375	VI	AGY	101	557276	Insurance Company	316	Variable Contracts	ELECTRONIC
376	VI	AGY	101	557276	Insurance Company	336	County Mutual	ELECTRONIC
377	VT	AGY	101	557276	Insurance Company	074	Doesn't Appoint By LOA	ELECTRONIC
378	VT	AGY	101	557276	Insurance Company	091	Funeral Expense	ELECTRONIC
379	VT	AGY	101	557276	Insurance Company	123	Life	ELECTRONIC
380	VT	AGY	101	557276	Insurance Company	175	Managing General Agent	ELECTRONIC
381	VT	AGY	101	557276	Insurance Company	319	Variable Life and Annuity	ELECTRONIC
382	WA	AGY	101	557276	Insurance Company	074	Doesn't Appoint By LOA	ELECTRONIC
383	WI	AGY	101	557276	Insurance Company	074	Doesn't Appoint By LOA	ELECTRONIC
384	WI	AGY	101	557276	Insurance Company	123	Life	ELECTRONIC
385	WV	AGY	101	557276	Insurance Company	074	Doesn't Appoint By LOA	ELECTRONIC
386	WV	AGY	101	557276	Insurance Company	999	Carrier Requests	RECORD ONL
387	WV	AGY	101	557276	Insurance Company	123	Life	ELECTRONIC
388	wv	AGY	101	557276	Insurance Company	126	Life and Accident and Sickness (Resident only)	ELECTRONIC
389	WV	AGY	101	557276	Insurance Company	142	Life-Accident and Sickness-Property and Casualty (Resident only)	ELECTRONIC
390	WV	AGY	101	557276	Insurance Company	143	Life-Accident and Sickness-Variable Annuities (Resident only)	ELECTRONIC

update the Enhanced Appointment Profiles (EAP) in use in your company's PLM configuration to include the "Carrier Requests" appointment type, as shown above.

An EAP consists of combinations of states, the appointing companies in your carrier group that are admitted in those states, the appointment types available to each company in each state, and the submission method (electronic, paper, or record-only) used by each state. The EAP enforces valid combinations of states, appointing companies, and appointment types during processing of an automated appointment request submitted through Producer Express. By allowing appointment processing to be driven by a template of pre-configured rules instead of by manual data entry, the EAP makes it automated and fast.

Once the EAP is updated, the "Carrier Requests" appointment type will be available in Producer Express.

Note: Vertafore may set up your company's EAP to use the "Carrier Requests" appointment type during initial implementation of PLM, if the business requirement is communicated to Vertafore project staff and documented. Modifying an EAP after production implementation of PLM is a Managed Services engagement and may incur fees.

The table below lists common state license types for which producers holding the licenses are not required to be state-appointed and for which the "Carrier Requests" appointment type (appointment type code: 999) may be useful in your company's deployment of PLM:

State	Producer Type	Resident/Non-Resident	License Class Description
Mississippi	Agency	Both	Insurance Producer Entity
New York	Agency	Non-Resident	Non-Resident Broker Firm
New York	Agency	Non-Resident	Non-Resident Broker Life
New York	Agency	Resident	Resident Broker Firm
New York	Agency	Resident	Resident Broker Life
New York	Individual	Non-Resident	Non-Resident Broker
New York	Individual	Non-Resident	Non-Resident Broker Life



New York	Individual	Resident	Resident Broker
New York	Individual	Resident	Resident Broker Life
West Virginia	Agency	Both	Business Entity Producer

Setting Up Your Company's Internal Systems to Use the "Carrier Requests" Appointment Type

If your company intends other internal systems integrated with PLM to consume the "Carrier Requests" appointment, after Vertafore completes its set-up activities your company's IT staff must map the "Carrier Requests" appointment type code (999) to the appropriate code type in the other systems. The process should be no different than that used to map any other PLM appointment type code to the codes used in the internal systems.

Below is an excerpt of an example response file from the Outbound Data Feed, showing a producer with a "Carrier Requests" appointment:

```
<Counties/>
               <TrackingIdentifiers/>
       </Appointment>
       <Appointment InternalID="4926251" Action="Insert">
               <InsertUserID>CHEGGELUND</InsertUserID>
               <InsertDateTime>03-20-2012 16:27:54</InsertDateTime>
               <UpdateUserID>SYSTEM USER</UpdateUserID>
               <UpdateDateTime>03-20-2012 16:27:54</UpdateDateTime>
               <State>NY</State>
               <CompanyNAIC ID>54321</CompanyNAIC ID>
               <CompanyName>Acme Underwriters Insurance Company</CompanyName>
               <PayCode/>
               <Type Code="999">Carrier Requests</Type>
               <Status Code="AC">Active</Status>
               <ActiveDate>03-01-2012</ActiveDate>
               <PreviousFeedActiveDate/>
               <RenewalDate/>
               <TerminationDate/>
               <PreviousFeedTerminationDate/>
               <TerminationNotificationDate/>
               <TerminationReason/>
               <TerminationVestingType/>
               <StateVerifiedIndicator>N</StateVerifiedIndicator>
               <RecordOnlyIndicator>Y</RecordOnlyIndicator>
               <ResidentCounty/>
               <Requests/>
       </Appointment>
</Appointments>
<Agreements/>
<Applications/>
<LetterRequests/>
<BusinessUnits/>
<ProductCertifications/>
<Comments>
            ent InternalID="260094" Action="No
```

If you have questions, please contact your Vertafore representative.



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Adding a "Carrier Requests" Appointment

Manually Adding in Producer Manager

Use the **Add Appointments** page in PLM Producer Manager to manually add a "Carrier Requests" appointment to a producer record.

To open the Add Appointments page, choose one of the following methods:

• Click the Add New Appointments link in the Appointments data section of a producer record that is open on the Review/Update Producer page

Licensing menu,	🥏 🛛 Si	CON Producer	Manager™		UAT for 13427
select	Licensing	 Companies 	 Inquiries 	 Express Services 	Administration
Appointments,			Add App	ointments	I Roducer Quick Search
and then select			Search	Producer	
Add Appointments.	Producer Type	○ Firm	icensee		
Then, perform a	Please enter at least Last Tanke	one of the search criteria belo	w: First	Middle	
Producer Search	SSN	I	NPN	Active Business Unit	~
to open the record	License Number	[License State	×
of the producer	External System I	D [Primary External ID Only	
whom you wish to appoint	Records Per Page: 1	0 💌			Search Cancel
Click the Add			Home He	lp Contact Us	

- Appointments link in the Task Links section of the Producer Manager Home page
- Click the Appoint Producer button (¹/₁) on the Process Approved License Applications page
- Click the Add Appointments link on any workflow transition page on which it appears.

On the **Add Appointments** page, in the **Effective Date** field enter the date on which the producer's "Carrier Requests" appointment became effective. Use the *mmddyyyy* date format, or click the **Calendar** button () to open a popup calendar from which you can click to select a date.

Note: You may enter a past date, as long as it does not pre-date the **Effective Date** of the license or qualification that supports the "Carrier Requests" appointment.



In the **Submission Method** box, click to select the **Record Only** radio button. The system will not submit the appointment request to a state, and regulators in the "Carrier Requests" appointment state will not have a record of the appointment.

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censing	 Companies 	 Inquiries 	 Express Services 	 Administration
				Producer Quick Search
ppointee		Add Appoi	intments	
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SN	License State/#	Active BU	NPN	Resident States
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Appointi	ing Companies NAIC ID Company 724147 INSURANCE COMPANY	ol Select All States	Nebraska New York Unselect All States	Texas Wisconsin
States and States Arizona Illinois Appointi	a Michigan a Michigan Mississipy NAIC ID Company 57 24147 INSURANCE COMPANY	Select All States	Nebraska New York Unselect All States Unselect All Companies	Texas

Note: If you leave the default **Electronic Processing** radio button selected, Producer Manager may display error messages, and you may have to begin the process over again.

Click to select the States and Appointing Companies radio button.

In the **States** section, click to checkmark the checkbox that corresponds to the state in which you want to record the "Carrier Requests" appointment.

In the **Appointing Companies** section, click to checkmark the checkbox that corresponds to the carrier appointing company with which you want to record the "Carrier Requests" appointment.

Click the **Next** button to continue. Producer Manager will calculate the appointment types that are available to select, given the combination of the selected state, the selected producer's license and LOA, and the selected appointing company's configured available appointment types.

When it is finished, the **Add Appointments** page will update with additional data fields and controls.



In the **Select Appointments** section, click to checkmark the checkbox the "Carrier Requests" appointment type, available for the selected appointing company in the selected state.

Click the **Save and Continue** button.

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AIC ID	Company App	pintment Type	Tied to an Application	Status
	No current appointments in this stat	te for this producer.		
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NAIC ID	Company			Appointment Type
24147	INSURANCE COMPANY			Carrier Requests
State Cost Center	*			
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24147 IN	SURANCE COMPANY			*
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				Save and Continue
				Save and Continue

The Add Appointments

page will update one more time, this time to confirm the "record-only" action.

Click the **Return** button to finish.

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								Effective Date: 03-01-201
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24147	INSURANCE COMPANY				Carrier Re	quests	Record Only	N/A
								Return



You may review the record the internal-only "Carrier Requests" appointment in the **Appointments** data section of the selected producer's record.

Licenses License License Type Arizona Insurance Professional 177 Hardingan Non-Resident Producer Michigan Non-Resident Producer Michigan Non-Resident Producer Michigan Non-Resident Broker B New York Non-Resident Broker Life New York Non-Resident Broker Life D New York Non-Resident	License Number 9612 9631 5216 5308515 7600789	Original Issue Date 02-10-2004 11-25-1997 08-28-2000 10-27-2009	Status Active Active Active	Effective Date 02-10-2004 11-25-1997	Expiration Date 03-31-2013	Inactivatio	n Reason	License Suspend Begin Date	Add License Suspend	New License/ Copy Rec'd	Qualificatio
Licenses License Type License Type License Type Artzona Insurance Professional 17 Hillinois Producer 34 Michigan Non-Resident Producer 40 Nehraska Non-Resident Broker 40 New York Non-Resident Broker 40 New York Non-Resident Broker 12 New York Non-Resident Broker 12 Wisconsin Resident Intermediary Indv 22 Qualifications	License Number 19631 15216 1308515 17600789	Original Issue Date 02-10-2004 11-25-1997 08-28-2000 10-27-2009	Status Active Active	Effective Date 02-10-2004 11-25-1997	Expiration Date 03-31-2013	Inactivatio	n Reason	License Suspend Begin Date	License Suspend	Copy Rec'd	
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Mississippi Insurance Producer 40 Mississippi Insurance Producer After Seident Producer New York Non-Resident Broker New York Non-Resident Broker Life New York Non-Resident Broker Life New York Non-Resident Broker Life Wisconsin Resident Intermediary Indv 22 Qualifications	5216 308515 7600789	10-27-2009		08-28-2000	03-31-2013						Inactivate
Hohraska Non-Resident Producer AC New York Non-Resident Broker 89 New York Non-Resident Broker Life 06 Texas General Lines Agent 12 Wisconsin Resident Intermediary Indv 22 Qualifications	308515 7600789		Active	10-27-2009	03-31-2014						Inactivate
New York Non-Resident Broker 89 New York Non-Resident Broker Life 06 Texas General Lines Agent 12 Wisconsin Resident Intermediary Indv 22 Qualifications	7600789	12-19-2003	Active	12-19-2003	03-31-2013						Inactivate
New York Non-Resident Broker Life 06 Texas General Lines Agent 12 Wisconsin Resident Intermediary Indv 22 Qualifications		02-02-2012	Active	02-02-2012							Inactivate
E Texas General Lines Agent 12 Wisconsin Resident Intermediary Indv 22 Qualifications	808690	02-02-2012	Active	02-02-2012							Inactivate
B Wisconsin Resident Intermediary Indv 22 Qualifications	70027	04-05-2004	Active	04-05-2004	04-05-2014						Inactivate
≅Qualifications	94411	06-18-1991	Active	06-18-1991	03-31-2013						Inactivate
Appointments Grouping Options Visit Display Options Visit New York (1 appointment, 1 active)											1
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4									Display	ing appointments	s 1 - 1 of 1
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Wisconsin (4 appointments, 4 active)											Q
Actions: 🛑 Terminate 🥹 Quick Terminate 👰 Quick T		itate is not record	l only)								
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Configuring and Using a "Carrier Requests" Appointment Profile in Producer Manager

If your company's licensing staff frequently adds "Carrier Requests" appointments to producer records in Producer Manager, you can save time and avoid errors by configuring an appointment profile. An appointment profile is a set of pre-defined state, appointing company, and appointment type criteria that you can apply to frequently-requested appointments or terminations, saving manual data entry.

Note: The Appointment Profile discussed in this chapter is different from the Enhanced Appointment Profile (EAP) discussed elsewhere in this guide.

Then, when manually adding a "Carrier Requests" appointment you can select the appointment profile, rather than manually selecting disparate appointment options.

Here's how...

To configure an appointment profile, from the **Companies** menu, select **Appointment Profile Maintenance**, and then select **Add**

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		Carrier		•		@ `	Producer Quick Search
		Company		•			
		Appointment Details		•			
		Appointment Profile Maintenan	ce	Add Appointment Pro	ofile		
				Maintain Appointment	t Profile		

Appointment Profile. The Add Appointment Profile page will open.

On the Add Appointment Profile page, in the Profile Name field enter a name for the appointment profile. The value will appear on the Appointment Profile dropdown menu on the Add Appointments page. Maximum 255 characters.

From the Profile State

UAT for 13427 Sircon Producer Manager™ 🍒 Logged in as Valued User Logout Licensing Companies Inquirie Express Services Administration 3 Pro Add Appointment Profile Profile Name Internal Appointment Only - Mississippi Profile State Mississippi Begin Date 03-28-2012 • Next Cancel Home Help Contact Us

dropdown menu, select the name of the regulatory jurisdiction for which a "Carrier Requests" appointment will be recorded through the use of the appointment profile.

In the **Begin Date** field, enter the date on which the appointment profile was configured. Use the *mmddyyyy* date format. Or, click the **Calendar** button () to open a popup calendar from which you can click to select a date. Defaults to the current date. Value must be on or before the current date.

Then, click the **Next** button. The page will refresh to show additional options.



In the **Companies** section, click to checkmark the checkbox corresponding to one or multiple carrier appointing companies to add to the appointment profile. Click to checkmark the checkbox corresponding to a selected appointing company to add it to the appointment profile. Use of the appointment profile on the **Add Appointments**

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				Producer Quick Search						
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Profile Name	Internal Appoin	tment Only - Mississippi		Begin Date 03-28-2012						
Profile State	Mississippi	~								
Companies										
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Select Appoint	tment Types to Add:									
🗹 C	arrier Requests									
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				Save and Continue Cancel						
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page will automatically include the configured appointing companies.

In the **Appointment Types** section, click to checkmark the checkbox corresponding to the "Carrier Requests" appointment type to add it to the appointment profile. Use of the appointment profile on the **Add Appointments** page will automatically include the configured appointment types.

Note: The list of appointment types is derived from Vertafore-configured state appointment details (e.g., company authorized lines), which are viewable on an appointing company's record on the **Review/Update Company** page.

When you are finished, click the **Save and Continue** button. The appointment profile is now ready to use when you add a "Carrier Request" appointment.



To use the appointment profile, on the Add	Sircon Produ	cer Manager™		UAT for 13427
	Licensing Companies	▼ Inquiries	 Express Services 	Administration
Appointments page enter				🐼 🎽 🔍 Producer Quick Search
a desired Effective Date and select the Submission Method of	Appointee QUAKER AGENCY INC Unrated EIN License State# 22-1667344 🖽 AL 283749	Add Appo Active BU CHUS	Dintments NPN 1632371	Search Producer Resident States New Jersey
Then, click the	Effective Date 03-01-2012 Select an Appointment Profile or Select one of	r more States and Companies		 Electronic Processing Paper Record Only
radio button, and then from the Profile dropdown	Appointment Profile Profile Mississippi - Internal App	ointment Only - Mississippi 💙		
menu select the name of	 States and Appointing Companies 			
the appointment profile	States			
	🗖 Alabama	🔲 Illinois	Missouri	Pennsylvania
configured with the	Arizona	🔲 Indiana	Nebraska	South Carolina
"Carrier Pequests"	Arkansas	lowa	Nevada	Texas
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appointment type.	Colorado	Louisiana	New Jersey	Virginia
-11	Connecticut	Maine	New Mexico	Washington
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				Next Return
When you are finished, click the Save and		lione I liele	1 Control Un	
Commue Dutton.	L	Help	o Foontact Us	

Then, just continue with the steps described in adding a manual "Carrier Requests" appointment, beginning on page 11.



Adding Using Producer Express

Depending on your company's configuration of PLM Producer Express, an onboarding or maintenance transaction request to add a "Carrier Requests" appointment can be initiated by a carrier's distribution partner, such as a field marketing representative or managing general agent, or by home office licensing staff. It can be added manually or as part of an automated workflow – again, depending on platform configuration.

In a manual workflow, with a request record open in Producer Express, on the **Select Appointments** page checkmark the checkbox that corresponds with the state for which you want to add the "Carrier Requests" appointment.

Then click to checkmark the checkbox that corresponds with the appointing company for which you want to record the "Carrier Requests" appointment.

Then, click the **Review Appointments** button.

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	Colorado	🔲 Indiana	Mississippi	Oklahoma	West Virginia	
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	Delaware	Massachusetts	New Hampshire	South Carolina		
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	INSURANCE COMPANY (2	4147)				
		Select All Comp.	anies Deselect a	All Companies		
					Preview Appointments	

The **Review Generated Appointments** page will open, and display appointment type available in the selected state.



On the **Review** Generated

Appointments page, click to checkmark the Submit checkbox that corresponds with the "Carrier Requests" appointment. (If the "Carrier Requests" appointment is the only appointment type available, based on the selected producer's active state license type, it will already be selected.)

The **Status Date** field will display the maximumallowable appointment backdate by the selected state. Enter a more recent date using the *mmddyyyyy* date format, or click the

Calendar button () to open a popup calendar from which you can click to select a date.

When you are ready to add the "Carrier Requests" appointment to the producer's record in Producer Manager, click the **Submit to State** button. (Don't be confused by the name of the button; the "Carrier Requests" appointment is an internaluse, record-only appointment, and will *not* be submitted to the selected state.)

The Finish page will open.

Click the **Resume Workflow** button to continue.





Producer Express will add the "Carrier Requests" appointment to the selected producer's record in Producer Manager.

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•	Mississippi (1 appointment, 1 active)												
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j.	4 Page 1 of 1 🕨 🕅 🛛 🗱									Displayin	g appointments	1 - 1 of 1	
Actio	as: 🛑 Terminate 🔞 Quick Terminate 🔞	uick Te	rminate (State is not record o	only)									
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In Producer Express, a home office licensing specialist can review the **Workspace** and see that the request record now has a **Status** of Processed.

Producer Onboarding				Switch to PM	alladie Lasks 🍟	негр
rsonal Work Queue	Navigator - Custom					
My Requests (3)	Shows requests using your customize	d filter options.				
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By Current Owner	218128 Laural Lavaggi	06/23/10 Pro	cessed Packet completed		Close Request	9 0
Assigned to me	501793 Quaker Agency Inc	03/28/12 Pro	cessed Packet completed	Valued Recruit	er Close Request	n 🕰
had the Argentry Principal Packet						
Pending Processed Request ID						
By Request Date						
Begin date						
End date 03-28-2012						



Maintaining a "Carrier Requests" Appointment

Once added to a producer's record, the "Carrier Requests" appointment will remain active on the record until one of the following occurs:

- The appointment is "record-only" terminated, either manually in Producer Manager or Producer Express or through an automated or batch process through Producer Express.
- The last of the producer's state license(s) that support the "Carrier Requests" appointment becomes inactive

An automated data reconciliation of the producer record, such as a Quick Sync Producer, Scheduled Sync, or Producer Express Sync, will not inactivate the "Carrier Requests" appointment, unless the sync discovers that the last of the state license(s) that supports the "Carrier Requests" appointment has become inactive.

□ Lice	nses												
Lice	ense ate	License Type	License Number	Original Issue Date	Status	Effective Date	Expiration Date	Inactivatio	n Reason	License Suspend Begin Date	License Suspend End Date	Copy Rec'd	
E Arizo	na	Insurance Professional	170612	02-10-2004	Active	02-10-2004	03-31-2013						Inactivate
🕀 Illinoi	s	Producer	349631	11-25-1997	Active	11-25-1997	03-31-2013						Inactivate
🗄 Michi	gan	Non-Resident Producer		08-28-2000	Active	08-28-2000	03-31-2013						Inactivate
🕀 Missi	ssippi	Insurance Producer	405216	10-27-2009	Active	10-27-2009	03-31-2014						Inactivate
Nebr	aska	Non-Resident Producer	AG308515	12-19-2003	Active	12-19-2003	03-31-2013						Inactivate
⊞ New	York	Non-Resident Life A&H Agent	9569		Active	03-01-2012							Inactivate
⊞ New	York	Non-Resident Broker	897600789	1	Inactive	03-15-2012		Canceled					
⊞ New	York	Non-Resident Broker Life	06808690		Inactive	03-15-2012		Canceled					
⊞ Texa	s	General Lines Agent	1270027	04-05-2004	Active	04-05-2004	04-05-2014						Inactivate
TO MANY NO.		Eastheddowellordels	0004414	02.10.1001	1.4.4	10 40 4004	03.01.0040						به ده د د د
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14 -	l Pa	ge 1 of 1 🕨 🕅 🛱									Display	ying appointmer	nts 1 - 1 of 1



Terminating a "Carrier Requests" Appointment

Manually Terminating in Producer Manager

🗆 Annointmonte

You can terminate a "Carrier Requests" appointment on a producer's record in Producer Manager using the same steps you would use to terminate any other state-verified or recordonly appointment.

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he that America between the state	🐻 Grouping Options + 🐻 Display Options +	
In the Appointments data	Arizona (1 appointment, 1 active)	0
section of a selected	Rew York (1 appointment, 1 active)	Q
producer's record click	Texas (1 appointment, 1 active)	Q
	Wisconsin (4 appointments, 4 active)	Q
the node (H) to expand the	Actions: 🔴 Terminate 😨 Quick Terminate 💁 Quick Terminate (State is not record only)	
selected state	🔇 Add New Appointments 🛗 Correct Appointment Dates 💼 Manage Company Relationships	
appointments section.		

Click the Terminate
button associated with the
"Carrier Requests"
appointment. The
Terminate Appointments
page will open.

Appointments					
Grouping Options -	Display Options -				
Arizona (1 appointr	nent, 1 active)				
New York (1 appoint)	tment, 1 active)				
Writing Company 🔺		Appt Type	Status	Status Date	Actions
INSURANCE COMPA	NY	Carrier Requests	Active	03/01/2012	🥷 💁
4	▶ ▶ \$			Displayir	ng appo <mark>Terminate</mark> - 1 of :
Texas (1 appointme	nt, 1 active)				
🗉 Wisconsin (4 ap p e	atments, 4 active)				
ctions: 🔘 Terminate 🔯	Quick Terminate 👜 Quick Terminate (:	State is not record only)			

On the **Terminate Appointments** page, in the **Effective Date** field enter the date on which the producer's "Carrier Requests" appointment became effective. Use the *mmddyyyy* date format, or click the **Calendar** button (

) to open a popup calendar from which you can click to select a date.

It is not necessary when terminating the "Carrier Requests" appointment to

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select any option from the **Submission Method** box. Even if you accept the default option of Electronic Processing, the system will automatically apply a "record-only" termination to the "Carrier Requests" appointment. Further, rest assured, the system will not submit the termination request to a state.

Click the **Next** button to continue. The **Terminate Appointments** page will update to show additional data fields and controls.

Review the selections on the **Terminate Appointments** page. Note that the system confirms that the request is for termination of a record-only appointment. Do not be concerned that the **Terminate Appointments** page confirms the producer's license that supports the record-only appointment. If desired, select an

alternate not-for-cause option from the **Termination Reason** dropdown menu.

When you are ready, click the **Save and Continue** button.

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						Return
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Note: You may also use the **Quick Terminate** button to process a record-only termination of a "Carrier Requests" appointment. The use of **Quick Terminate** always results in only record-only terminations of appointments, whether the appointments are state-verified, record-only, or internal-use only.

Use caution if a producer holds appointments additional to the "Carrier Requests" appointment in a state-verified appointment state. Use of the **Quick Terminate** button under these conditions may result in the inadvertent, record-only termination of all of the producer's appointments in that state, including state-verified appointments.

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