



POWERING  
YOUR  
POSSIBLE.

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# SIRCON FOR CARRIERS

**Writing Company  
Management**

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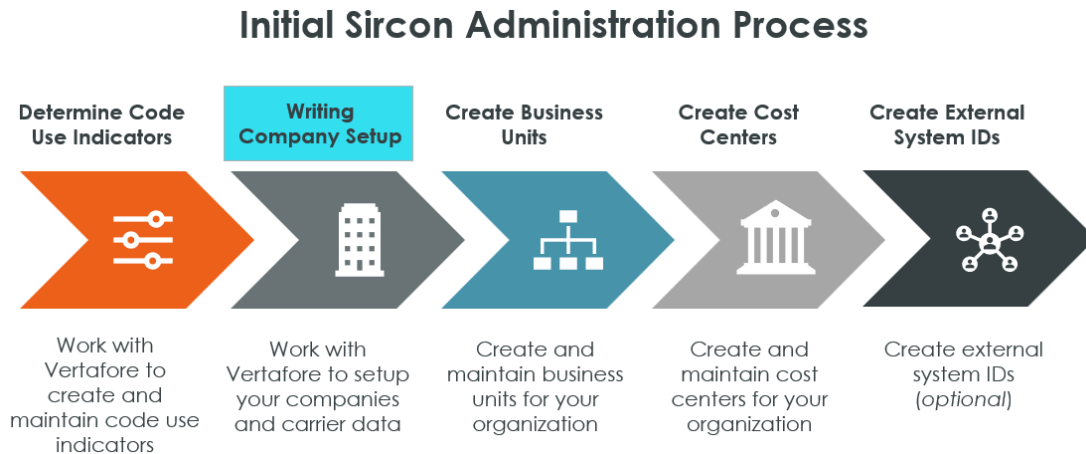
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## Overview

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### Introduction and Background

Before you can appoint or terminate producers, your organization must set up the companies, or underwriting companies. Setting up writing companies is part of the Sircon administration process.



There are four steps to set up a writing company:

1. Add the company to Producer Central.
2. Set up State Appointment details for each state where the company appoints or terminates producers.
3. Complete paperwork to add the producer and set up state appointments in the back end of Producer Central. Submit paperwork to your Vertafore contact person.
4. Vertafore will complete the configuration in the back end of Producer Central.

After the configuration is complete, Company appointments and terminations can be processed.

### What will be covered?

In this quick guide, we will cover how to create and maintain writing companies. We will cover each step of the company management process.

### Who should use this document?

Any user that needs to create or maintain writing company or state appointment details. Only users with administrative access can maintain writing company details.

### When should you use this document?

When you need to add a new company, edit an existing company, or maintain state appointment details.

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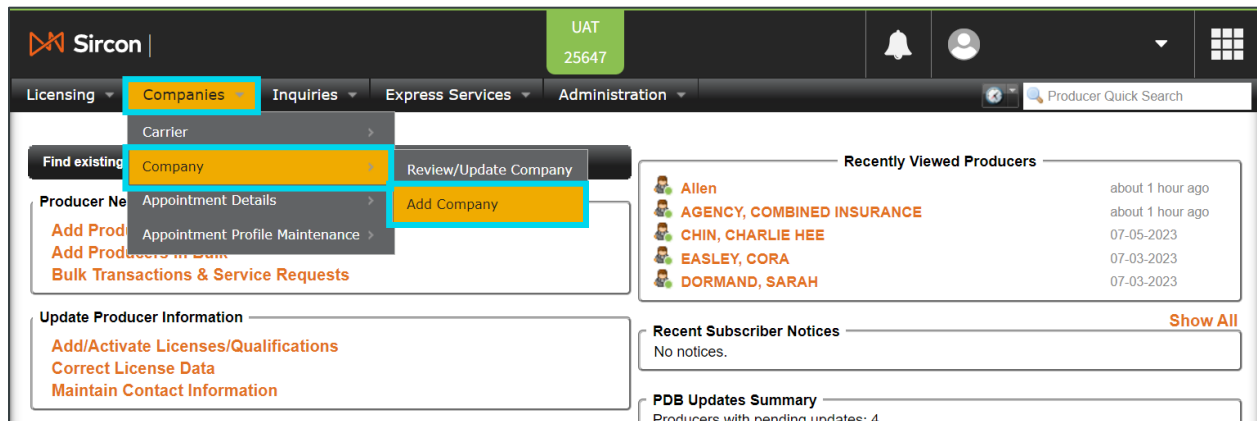
## Add Company

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The first step is to add a company to the front end of Producer Central. Follow these steps to create a company. Before you can create a company, you will need the following information:

- EIN
- NAIC ID
- Domicile State
- Address & Contact Information

1. From the **Companies** menu, click **Company** then click **Add Company**.

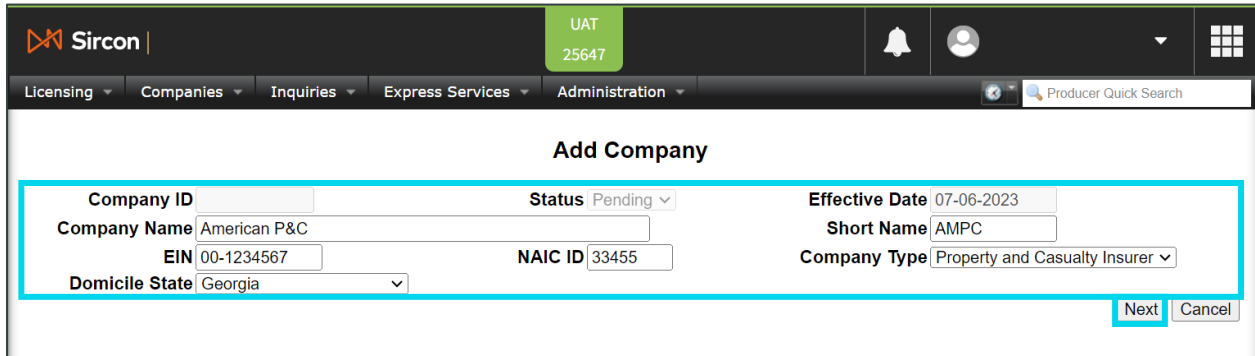


2. You will now see the *Add Company* page.
3. Enter the following information:
  - **Company Name** – Enter the company's legal name as recorded in its domicile state.
  - **EIN** – Enter the company's Federal Employer Identification Number
  - **Domicile State** – Select the company's legal domicile state from the dropdown menu.
  - **NAIC ID** – Enter the company's unique National Associate of Insurance Commissioners identification number.
  - **Short Name** – Enter a unique short name or code for the company.
  - **Company Type** – Select the company's type of business from the dropdown menu.

**Note:** The **Company ID** will be generated after you create the company. The **Status** will default to **Pending** and the **Effective Date** will default to the current date.

4. Click **Next**.

## Section: Add Company



**Add Company**

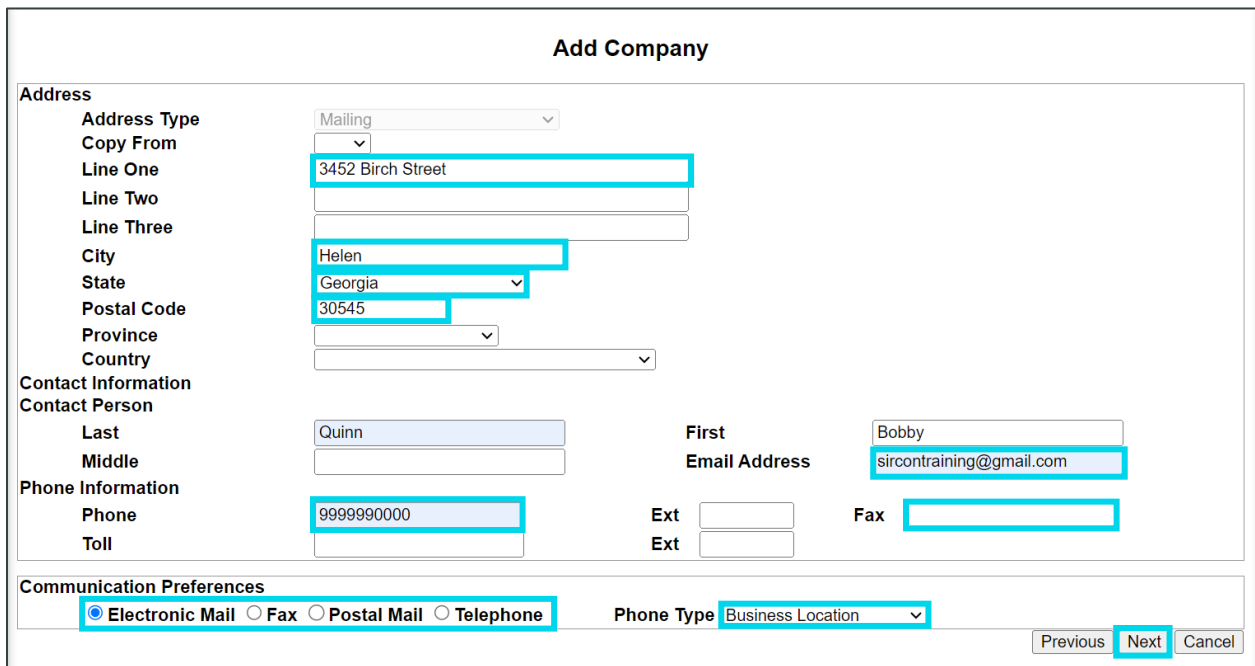
Company ID:  Status: Pending  Effective Date: 07-06-2023

Company Name: American P&C Short Name: AMPC

EIN: 00-1234567 NAIC ID: 33455 Company Type: Property and Casualty Insurer

Domicile State: Georgia

5. Enter the **Mailing Address** information. The following fields are required:
  - **Line One** – Add the first line of the mailing address.
  - **City** – Enter the city of the mailing address.
  - **State** – Select the name of U.S. state from the dropdown menu.
  - **Postal Code** – Enter the ZIP code or postal code of the mailing address.
6. Choose the **Communication Preferences** (either Electronic Mail, Fax, Postal Mail, or Telephone) for the mailing address.
7. Use the dropdown menu to select the **Phone Type**.



**Add Company**

**Address**

Address Type: Mailing

Copy From:

Line One: 3452 Birch Street

Line Two:

Line Three:

City: Helen

State: Georgia

Postal Code: 30545

Province:

Country:

**Contact Information**

Contact Person

Last: Quinn First: Bobby

Middle:  Email Address: sircontraining@gmail.com

**Phone Information**

Phone: 9999990000 Ext:

Toll:  Ext:  Fax:

**Communication Preferences**

Electronic Mail  Fax  Postal Mail  Telephone Phone Type: Business Location

**Note:** Depending on the communication preferences you chose, additional fields are required. If you choose **Electronic Mail** the **Email Address** is required. If you choose **Fax**, the **Fax** number is required. If you chose **Telephone**, the **Phone** number is required.

Section: Add Company

8. The other fields are optional, including:
  - **Last** – Add the last name of the contact individual associated with the mailing address.
  - **First** – Add the first name of the contact individual associated with the mailing address.
9. Click **Next**.

### Add Company

**Address**

Address Type: Mailing

Copy From: ▼

Line One: 3452 Birch Street

Line Two:

Line Three:

City: Helen

State: Georgia

Postal Code: 30545

Province: ▼

Country: ▼

**Contact Information**

**Contact Person**

Last: Quinn      First: Bobby

Middle:       Email Address: sircontraining@gmail.com

**Phone Information**

Phone: 9999990000      Ext:       Fax:

Toll:       Ext:

**Communication Preferences**

Electronic Mail  
  Fax  
  Postal Mail  
  Telephone     
 Phone Type: Business Location

Previous
Next
Cancel

10. Next add a **Business Location** address.
11. If the business address is the same as the Mailing Address, click the dropdown arrow next to the **Copy From** field and click **Mailing**.

### Add Company

**Address**

Address Type: Business Location

Copy From: ▼

Line One:

Line Two: Mailing

Line Three:

City:

State: ▼

Postal Code:

Province: ▼

Country: ▼

**Contact Information**

**Contact Person**

Last:       First:

Middle:       Email Address:

## Section: Add Company

12. If the Business Location address is different, you will need to fill in the address information. Required fields are the same as the Mailing Address.

13. Click **Save and Review** to submit the address information.

### Add Company

**Address**

Address Type: Business Location

Copy From: [dropdown]

Line One: 4544 Roman Way

Line Two: [text box]

Line Three: [text box]

City: Athens

State: Georgia

Postal Code: 30612

Province: [dropdown]

Country: [dropdown]

**Contact Information**

Contact Person

Last: Quinn      First: Bobby

Middle: [text box]      Email Address: sircontraining@gmail.com

Phone Information


Phone: 1112223333      Ext: [text box]      Fax: [text box]

Toll: [text box]      Ext: [text box]




**Communication Preferences**

Electronic Mail  
  Fax  
  Postal Mail  
  Telephone     
 Phone Type: Business Location

14. You will now see the *Review/Update Company* page. All the information you submitted is available here, including the **Company Details** and **Contact Information**.



UAT  
25647

Licensing
Companies
Inquiries
Express Services
Administration

Producer Quick Search

### Review/Update Company

Company Name	EIN	License Number	NAIC ID	City	State
American P&C	00-1234567		33455	Helen	Georgia

[Search Company](#)

**Expand All**

[Company Details](#)     
 [State Appointment Details](#)     
 [External System Identifiers](#)     
 [Comment](#)

[Contact Information](#)     
 [Aliases](#)

**Company Details** Top

Company ID: 2247975	Status: Pending	Effective Date: 07-06-2023
Company Name: American P&C	NAIC ID: 33455	Short Name: AMPC
EIN: 00-1234567	Company Type: Property and Casualty Insurer	
Domicile State: Georgia		

**Contact Information** Top

**State Appointment Details** Top

**Aliases** Top

**External System Identifiers** Top

[Add/Update/Delete External System Identifiers](#)

**Comment** Top

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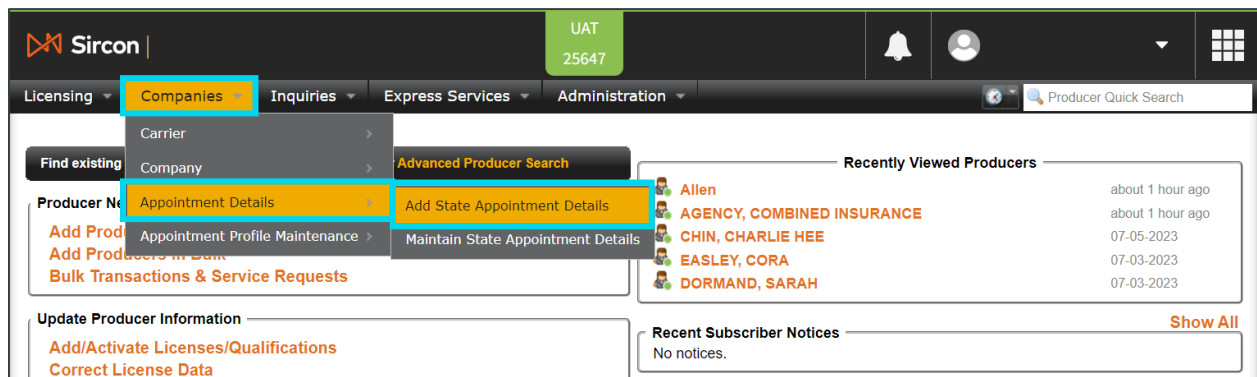
## Add State Appointment Details

After the writing company is added to Producer Central, state appointment details will need to be added to the company for each state where the company appoints or terminates producers.

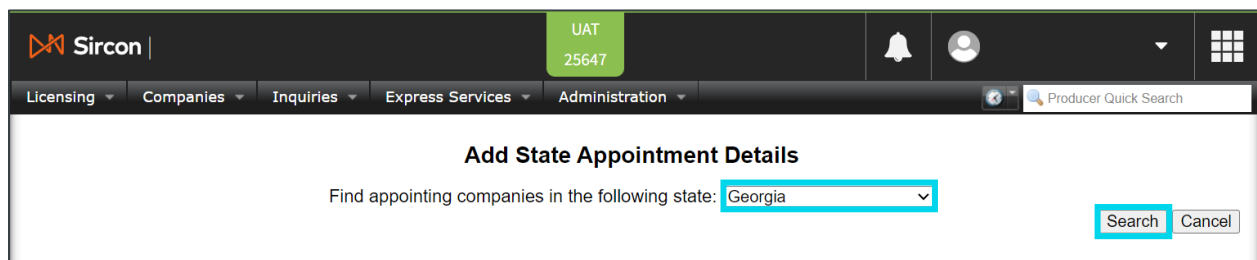
Use the *Add State Appointment Details* page to add a new state along with related available appointment types and appointing authorities for a company in that state.

**Note:** If companies do not have state appointment details assigned, you will receive errors when you try to appoint or terminate producers. Appointment types will not be available as an option in PM until the customer has contacted and had their CSA activate the proper code use indicators.

1. From the **Companies** menu, click **Appointment Details** then click **Add State Appointment Details**.



2. You will now see the *Add State Appointment Details* page.
3. From the dropdown menu, select the **State** where you need to add an appointment company.
4. Click **Search**.



5. You will now see the *Add State Appointment Details for State* page.
6. In the **Current Appointments** section, you will see a list of the companies that currently have appointments for the state.



## Section: Add State Appointment Details

- In the **Available Companies** section, you can click the checkbox next to each company you need to set up with a state appointment.
- Click **Next**.

### Add State Appointment Details for State: Georgia

**Current Appointments**

Company Name	Status	Status Date	Company/License Number	Assigned Appointing Authority
American Life	Active	01-01-1900	123	Administrator, SIRCON
Lansing Mutual Life	Active	12-13-2022	LIC0014	Reddy K, Keerthi
Lansing Mutual P&C	Active	02-27-2023	09876	Stockwell, Penelope

**Available Companies**

Company Name	Short Name	EIN	NAIC ID	City
<input type="checkbox"/> American Ancillary	ANC	124548951	71730	bus city
<input type="checkbox"/> American Annuities	GAN	879546213	64247	bus city
<input type="checkbox"/> American Equity Insurance	AEI	147685745	12015	bus city
<input type="checkbox"/> American Life	AML	132611847	70939	bus city
<input checked="" type="checkbox"/> American P&C	AMPC	001234567	33455	Helen
<input type="checkbox"/> American Preneed	APR	978964621	95088	bus city
<input type="checkbox"/> Lansing Mutual Health	LMH	124546516	14990	bus city
<input type="checkbox"/> Lansing Mutual Life	LML	321251651	21478	bus city
<input type="checkbox"/> Lansing Mutual Life of NY	LMLNY	984653213	98214	bus city
<input type="checkbox"/> Lansing Mutual P&C	LMPC	698666597	12345	Mail City
<input type="checkbox"/> Lansing Mutual Training Company	LANTRAIN	100044400	23764	San Diego
<input type="checkbox"/> Testing Insurance Company	FLINCO	222333999	88774	Sodus

## Add Appointment Types

The **Appointment Types** section lists all appointment types available for the company in the new state.

- To add an appointment type, check the checkbox to the left of each **Appointment Type** you need to add.

**Note:** Appointment type options will be limited to the appointment type codes that have been activated by your CSA.

- The **Start Date** defaults to the current date and can be modified. Use the MM-DD-YYYY format.

**Note:** It is recommended that you change the **Start Date** to 01-01-1900.

Section: Add State Appointment Details

**Add State Appointment Details for State: Georgia**

Company Name American P&C	EIN 00-1234567	License Number	NAIC ID 33455	City Helen	State Georgia
------------------------------	-------------------	----------------	------------------	---------------	------------------

Company/License Number:  Assigned Appointing Authority:

**Appointment Types**  
No Current Appointment Types

**Add Appointment Types**

Add Appointment Type	Suspend New Appts	Start Date	Company/License Number
<input checked="" type="checkbox"/> Carrier Requests	<input type="checkbox"/>	<input style="border: 2px solid blue;" type="text" value="01-01-1900"/>	<input type="text"/>
<input checked="" type="checkbox"/> Doesn't Appear By LOA	<input type="checkbox"/>	<input style="border: 2px solid blue;" type="text" value="01-01-1900"/>	<input type="text"/>
<input checked="" type="checkbox"/> No LOA Needed	<input type="checkbox"/>	<input style="border: 2px solid blue;" type="text" value="01-01-1900"/>	<input type="text"/>

**Appointing Authorities**  
No Current Appointing Authorities

### Add Appointing Authorities

The **Appointing Authorities** section lists all appointing authorities available for the company in the new state. Active staff member names are available to select from the dropdown listing.

- To add an appointing authority, check the checkbox to the left of the staff member name(s) that you want to add to the state appointment.

**Add State Appointment Details for State: Georgia**

Company Name American P&C	EIN 00-1234567	License Number	NAIC ID 33455	City Helen	State Georgia
------------------------------	-------------------	----------------	------------------	---------------	------------------

Company/License Number:  Assigned Appointing Authority:

**Appointment Types**  
No Current Appointment Types

**Add Appointment Types**

Add Appointment Type	Suspend New Appts	Start Date	Company/License Number
<input checked="" type="checkbox"/> Carrier Requests	<input type="checkbox"/>	<input type="text" value="01-01-1900"/>	<input type="text"/>
<input checked="" type="checkbox"/> Doesn't Appear By LOA	<input type="checkbox"/>	<input type="text" value="01-01-1900"/>	<input type="text"/>
<input checked="" type="checkbox"/> No LOA Needed	<input type="checkbox"/>	<input type="text" value="01-01-1900"/>	<input type="text"/>

**Appointing Authorities**  
No Current Appointing Authorities

**Add Appointing Authorities**

<input type="checkbox"/> Administrator, SIRCON <input type="checkbox"/> AdminOOB, Compensation <input type="checkbox"/> Allen, Carey <input type="checkbox"/> Analyst, Comp <input type="checkbox"/> Analyst, Comp <input type="checkbox"/> Analyst, UAT <input type="checkbox"/> Anderson, Bryan <input type="checkbox"/> Arigey, Ram <input type="checkbox"/> Arigey, Ram Prasad <input type="checkbox"/> Avalos, Eugene <input type="checkbox"/> Avalos, Eugene <input type="checkbox"/> BARTOL, ROBERT <input type="checkbox"/> basic, Comp <input type="checkbox"/> Battula, Sushmanth <input type="checkbox"/> Bedadhala, Akki <input type="checkbox"/> Benjamin, Tyler <input type="checkbox"/> Black, Michael <input type="checkbox"/> Bob, Smith <input type="checkbox"/> Bojanapu, Ganesh <input type="checkbox"/> Brandt, Meagan <input type="checkbox"/> Burris, Callie <input type="checkbox"/> Ch, Williams <input type="checkbox"/> CHAMBLIN, DEBORAH <input type="checkbox"/> Chatterjee, Manisha <input type="checkbox"/> Cochran, Cynthia <input type="checkbox"/> Cochran, Cynthia <input type="checkbox"/> CompAdmin, Aparna <input type="checkbox"/> compadmin, shravya <input type="checkbox"/> compadmin, yamini <input type="checkbox"/> Cook, Michele <input type="checkbox"/> Cooper, John <input type="checkbox"/> Cormier, Jamaar <input type="checkbox"/> Cronin, Ali <input type="checkbox"/> Davis, Jay <input type="checkbox"/> Dewangan, Tarun <input type="checkbox"/> Dorman, Jamie	<input type="checkbox"/> Downing, Delaney <input type="checkbox"/> Draper, Kris <input type="checkbox"/> Eevuri, Srinivasa <input type="checkbox"/> Egge, Samantha <input type="checkbox"/> Engels, Beth <input type="checkbox"/> Estrellado, Jon <input type="checkbox"/> Feighner, Dalen <input type="checkbox"/> Flynn, Ashleigh <input type="checkbox"/> Fulton, Chris <input type="checkbox"/> Gantasala, Rajesh <input type="checkbox"/> Gillahan, Scott <input type="checkbox"/> Girirayani, Srinivas <input type="checkbox"/> GK, Rajesh <input type="checkbox"/> Gregorasz, Bob <input type="checkbox"/> Groetsch, Dobra <input type="checkbox"/> Gurram, Naga Sandeep <input checked="" type="checkbox"/> <b>Hall, Lauren</b> <input type="checkbox"/> Handy, Brad <input type="checkbox"/> Hilligus, Rob <input type="checkbox"/> Holtman, Keli <input type="checkbox"/> Jack, Dornan <input type="checkbox"/> Jankowitz, Chuck <input type="checkbox"/> Jensen, Nicole <input type="checkbox"/> Jhonson, Dakota <input type="checkbox"/> Khanal, Rachita <input type="checkbox"/> Klopfer, Emily <input type="checkbox"/> Komandia, Divya <input type="checkbox"/> Konduri, Kishore <input type="checkbox"/> Krishna Reddy Bommu, Rama <input type="checkbox"/> Kumar, Rajesh <input type="checkbox"/> Kumar, Rajesh <input type="checkbox"/> Kurichati, Swetha Sravanthi <input type="checkbox"/> Lakshmanan, Sandeep <input type="checkbox"/> Mahmood, Shaz <input type="checkbox"/> Manchineella, Sreenivas <input type="checkbox"/> Mandava, Vajanya	<input type="checkbox"/> Marni, Ramesh <input type="checkbox"/> MORRISSEY, WILLIAM <input type="checkbox"/> Niemiec, Brian <input type="checkbox"/> Oliver, JG <input type="checkbox"/> Paddock, John <input type="checkbox"/> Pagadala, Kumaraswamy <input type="checkbox"/> Panchaparvala, Naga <input type="checkbox"/> Pasumarthy, Santosh <input type="checkbox"/> Plamp, Kelly <input type="checkbox"/> Plamp, Kelly <input type="checkbox"/> Pullaiah, Nagasi <input type="checkbox"/> Readonly, Comp <input type="checkbox"/> Sadanaveni, Mahender <input type="checkbox"/> SAFAITE, MARIE <input type="checkbox"/> Samy, Jegan <input type="checkbox"/> Satya Nagendra Sugandham, Bala <input type="checkbox"/> Siripuram, Akhila <input type="checkbox"/> Smith, Dave <input type="checkbox"/> Spalding, Brian <input type="checkbox"/> Specialist, Patrick <input type="checkbox"/> Stockwell, Jessica <input type="checkbox"/> Stockwell, Penelope <input type="checkbox"/> Stom, Dennis <input type="checkbox"/> Stom, Dennis <input type="checkbox"/> Stone, Douglas <input type="checkbox"/> Varamini, Soheil <input type="checkbox"/> Vecs, Test <input type="checkbox"/> Venkatapuram, Mounika <input type="checkbox"/> Wesson, Trina <input type="checkbox"/> Wicke, JC <input type="checkbox"/> Williams, Betsey <input type="checkbox"/> Williams, Clark <input type="checkbox"/> Williams, Megan <input type="checkbox"/> Yzerman, Steve <input type="checkbox"/> Zahm, Ryan
---	---	---

Begin Date:

Section: Add State Appointment Details

Save Appointment Details

1. Click the **Save** button to submit the **Appointment Types** and **Appointing Authorities**.

**Add State Appointment Details for State: Georgia**

<b>Company Name</b> American P&C	<b>EIN</b> 00-1234567	<b>License Number</b>	<b>NAIC ID</b> 33455	<b>City</b> Helen	<b>State</b> Georgia
-------------------------------------	--------------------------	-----------------------	-------------------------	----------------------	-------------------------

<b>Company/License Number</b> 332211	<b>Assigned Appointing Authority</b> Stom, Dennis
---	--

**Appointment Types**  
No Current Appointment Types

**Add Appointment Types**

Add Appointment Type	Suspend New Appts	Start Date	Company/License Number
<input checked="" type="checkbox"/> Carrier Requests	<input type="checkbox"/>	01-01-1900	
<input checked="" type="checkbox"/> Doesn't Appoint By LOA	<input type="checkbox"/>	01-01-1900	
<input checked="" type="checkbox"/> No LOA Needed	<input type="checkbox"/>	01-01-1900	

**Appointing Authorities**  
No Current Appointing Authorities

**Add Appointing Authorities**

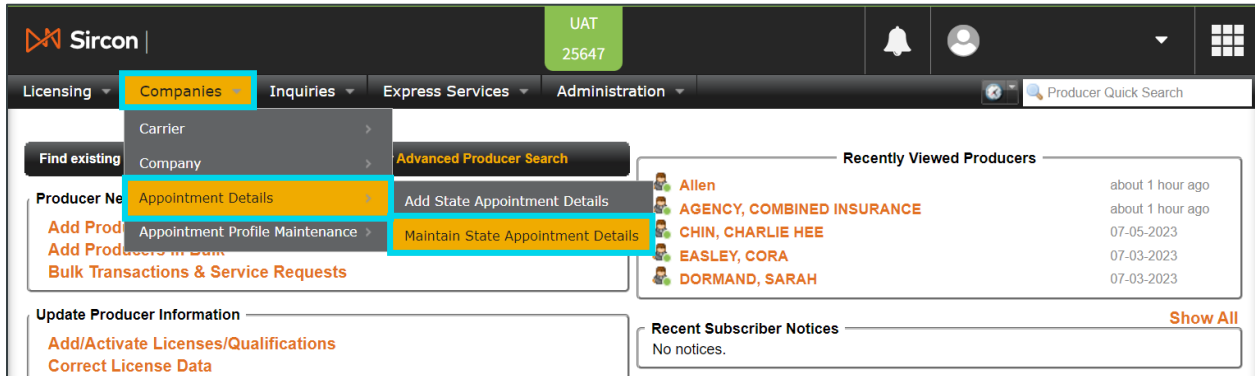
<input type="checkbox"/> Administrator, SIRCON <input type="checkbox"/> AdminOOB, Compensation <input type="checkbox"/> Allen, Carey <input type="checkbox"/> Analyst, Comp <input type="checkbox"/> Analyst, Comp <input type="checkbox"/> Analyst, UAT <input type="checkbox"/> Anderson, Bryan <input type="checkbox"/> Arigey, Ram <input type="checkbox"/> Arigey, Ram Prasad <input type="checkbox"/> Avalos, Eugene <input type="checkbox"/> Avalos, Eugene <input type="checkbox"/> BARTOL, ROBERT <input type="checkbox"/> basic, Comp <input type="checkbox"/> Battula, Sushmanth <input type="checkbox"/> Bedadhala, Akki <input type="checkbox"/> Benjamin, Tyler <input type="checkbox"/> Black, Michael <input type="checkbox"/> Bob , Smith <input type="checkbox"/> Bojanapu, Ganesh <input type="checkbox"/> Brandt, Meagan <input type="checkbox"/> Burris, Callie <input type="checkbox"/> Ch, Williams <input type="checkbox"/> CHAMBLIN, DEBORAH <input type="checkbox"/> Chatterjee, Manisha <input type="checkbox"/> Cochran, Cynthia <input type="checkbox"/> Cochran, Cynthia <input type="checkbox"/> CompAdmin, Aparna <input type="checkbox"/> compadmin, shravya <input type="checkbox"/> compadmin, yamini <input type="checkbox"/> Cook, Michele <input type="checkbox"/> Cooper, John <input type="checkbox"/> Cormier, Jamaar <input type="checkbox"/> Cronin, Ali <input type="checkbox"/> Davis, Jay <input type="checkbox"/> Dewangan, Tarun <input type="checkbox"/> Dornan, Jamie	<input type="checkbox"/> Downing, Delaney <input type="checkbox"/> Draper, Kris <input type="checkbox"/> Eevuri, Srinivasa <input type="checkbox"/> Egge, Samantha <input type="checkbox"/> Engels, Beth <input type="checkbox"/> Estrellado, Jon <input type="checkbox"/> Feighner, Dalen <input type="checkbox"/> Flynn, Ashleigh <input type="checkbox"/> Fulton, Chris <input type="checkbox"/> Gantasala, Rajesh <input type="checkbox"/> Gillahan, Scott <input type="checkbox"/> Girirayani, Srinivas <input type="checkbox"/> GK, Rajesh <input type="checkbox"/> Gregorasz, Bob <input type="checkbox"/> Groetsch, Debra <input type="checkbox"/> Gurram, Naga Sandeep <input checked="" type="checkbox"/> Hall, Lauren <input type="checkbox"/> Handy, Brad <input type="checkbox"/> Hilligus, Rob <input type="checkbox"/> Holtman, Keli <input type="checkbox"/> Jack, Dornan <input type="checkbox"/> Jankowitz, Chuck <input type="checkbox"/> Jensen, Nicolene <input type="checkbox"/> Jhonson, Dakota <input type="checkbox"/> Khanal, Rachita <input type="checkbox"/> Klopfer, Emily <input type="checkbox"/> Komandla, Divya <input type="checkbox"/> Konduri, Kishore <input type="checkbox"/> Krishna Reddy Bommu, Rama <input type="checkbox"/> Kumar, Rajesh <input type="checkbox"/> Kumar, Rajesh <input type="checkbox"/> Kurichati, Swetha Sravanthi <input type="checkbox"/> Lakshmanan, Sandeep <input type="checkbox"/> Mahmood, Shaz <input type="checkbox"/> Manchineella, Sreenivas <input type="checkbox"/> Mandava, Vajjanya	<input type="checkbox"/> Marni, Ramesh <input type="checkbox"/> MORRISSEY, WILLIAM <input type="checkbox"/> Niemiec, Brian <input type="checkbox"/> Oliver, JG <input type="checkbox"/> Paddock, John <input type="checkbox"/> Pagadala, Kumaraswamy <input type="checkbox"/> Panchaparvala, Naga <input type="checkbox"/> Pasumarthy, Santosh <input type="checkbox"/> Plamp, Kelly <input type="checkbox"/> Plamp, Kelly <input type="checkbox"/> Pullaiah, Nagasi <input type="checkbox"/> Readonly, Comp <input type="checkbox"/> Sadanaveni, Mahender <input type="checkbox"/> SAFAITE, MARIE <input type="checkbox"/> Samy, Jegan <input type="checkbox"/> Satya Nagendra Sugandham, Bala <input type="checkbox"/> Siripuram, Akhila <input type="checkbox"/> Smith, Dave <input type="checkbox"/> Spalding, Brian <input type="checkbox"/> Specialist, Patrick <input type="checkbox"/> Stockwell, Jessica <input type="checkbox"/> Stockwell, Penelope <input type="checkbox"/> Stom, Dennis <input type="checkbox"/> Stom, Dennis <input type="checkbox"/> Stone, Douglas <input type="checkbox"/> Varamini, Soheil <input type="checkbox"/> Vecs, Test <input type="checkbox"/> Venkatapuram, Mounika <input type="checkbox"/> Wesson, Trina <input type="checkbox"/> Wicke, JC <input type="checkbox"/> Williams, Betsey <input type="checkbox"/> Williams, Clark <input type="checkbox"/> Williams, Megan <input type="checkbox"/> Yzerman, Steve <input type="checkbox"/> Zahm, Ryan
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**Begin Date** 07-06-2023

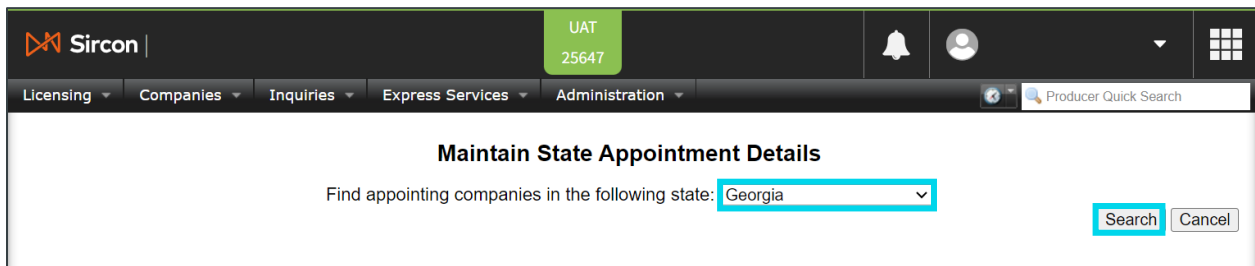
Section: Add State Appointment Details

### Confirm Appointment Details Submitted Successfully

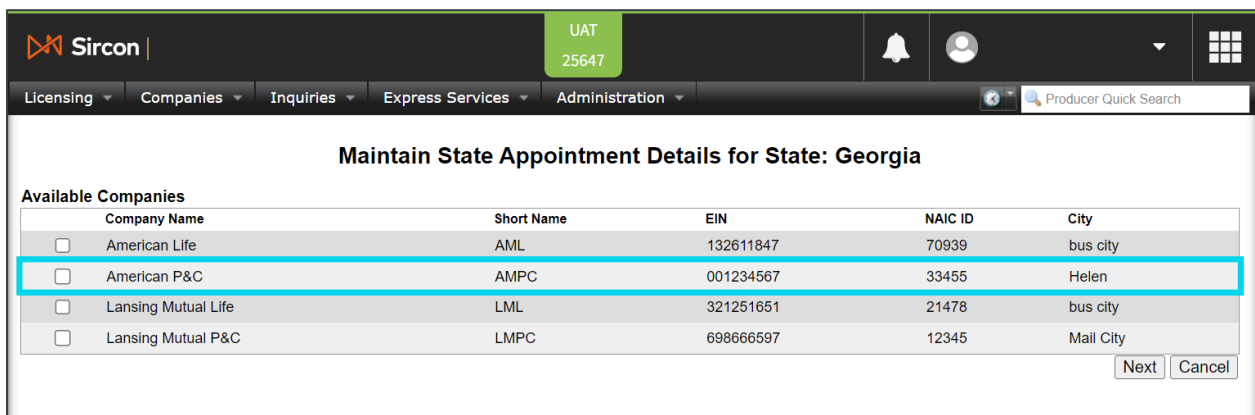
1. From the **Companies** menu, click **Appointment Details** then click **Maintain State Appointment Details**.



2. Select the **State** you need to view from the dropdown menu then click **Search**.



3. You should now see the companies that have appointments configured for the selected state in the **Available Companies** list.



Maintain State Appointment Details for State: Georgia					
Available Companies					
	Company Name	Short Name	EIN	NAIC ID	City
<input type="checkbox"/>	American Life	AML	132611847	70939	bus city
<input type="checkbox"/>	American P&C	AMPC	001234567	33455	Helen
<input type="checkbox"/>	Lansing Mutual Life	LML	321251651	21478	bus city
<input type="checkbox"/>	Lansing Mutual P&C	LMPC	698666597	12345	Mail City

## Complete Vertafore Company Set-up Paperwork

After you add the company and state appointment details to the front end of Producer Central, you will need to complete paperwork so that your Vertafore representative can configure the backend of Producer Central.

You will only need to fill out the document when:

1. Adding a new writing company
2. Adding a company license for states that require one to be sent with the transaction
3. Adding an authorized signer for states that require one to be sent with the transaction

Contact your Vertafore representative through My Vertafore for a copy of the document.

### Adding a New Carrier/Company to an Existing Account Paperwork

<p><b>Adding a New Carrier/Company to an Existing Account</b></p> <p><b>What is your Company Name:</b> _____</p> <p><b>What is your Siron Subscriber (Account) ID:</b> _____</p> <p>Statutory Company Name and Address is required by some states for both forms and electronic processing. Please complete the following and return to SIRON Support for set up on your account profile.</p> <p>Complete one Company Name and Address section for <u>each</u> NAIC number on your account. Copy this page for additional NAIC Numbers if necessary. Please type in the boxes to ensure information is accurately relayed.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 5px;"> <tr><th colspan="4" style="text-align: center;">Company Name and Address</th></tr> <tr><td colspan="2">Company Name:</td><td colspan="2">Domiciled State:</td></tr> <tr><td colspan="2">NAIC Number:</td><td colspan="2">Company Phone Number:</td></tr> <tr><td colspan="2">Street:</td><td colspan="2">FEIN:</td></tr> <tr><td>City:</td><td>State:</td><td>Zip Code:</td><td></td></tr> </table> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 5px;"> <tr><th colspan="4" style="text-align: center;">Company Name and Address</th></tr> <tr><td colspan="2">Company Name:</td><td colspan="2">Domiciled State:</td></tr> <tr><td colspan="2">NAIC Number:</td><td colspan="2">Company Phone Number:</td></tr> <tr><td colspan="2">Street:</td><td colspan="2">FEIN:</td></tr> <tr><td>City:</td><td>State:</td><td>Zip Code:</td><td></td></tr> </table> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 5px;"> <tr><th colspan="4" style="text-align: center;">Company Name and Address</th></tr> <tr><td colspan="2">Company Name:</td><td colspan="2">Domiciled State:</td></tr> <tr><td colspan="2">NAIC Number:</td><td colspan="2">Company Phone Number:</td></tr> <tr><td colspan="2">Street:</td><td colspan="2">FEIN:</td></tr> <tr><td>City:</td><td>State:</td><td>Zip Code:</td><td></td></tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><th colspan="4" style="text-align: center;">Company Name and Address</th></tr> <tr><td colspan="2">Company Name:</td><td colspan="2">Domiciled State:</td></tr> <tr><td colspan="2">NAIC Number:</td><td colspan="2">Company Phone Number:</td></tr> <tr><td colspan="2">Street:</td><td colspan="2">FEIN:</td></tr> <tr><td>City:</td><td>State:</td><td>Zip Code:</td><td></td></tr> </table> <p>You will have the ability to pre-set a sort order option on all forms submitted through Siron. Please indicate the sort order you prefer.</p> <p><input type="checkbox"/> State, Company, Producer      <input type="checkbox"/> State, Producer, Company</p> <p><b>IT Contact Person</b> – If you ever experience difficulty connecting to Siron we may need to contact an IT person from within your company. Please provide us with a contact name and phone number of someone in your IT Department.</p> <p>Name: _____</p> <p>Phone: _____</p>	Company Name and Address				Company Name:		Domiciled State:		NAIC Number:		Company Phone Number:		Street:		FEIN:		City:	State:	Zip Code:		Company Name and Address				Company Name:		Domiciled State:		NAIC Number:		Company Phone Number:		Street:		FEIN:		City:	State:	Zip Code:		Company Name and Address				Company Name:		Domiciled State:		NAIC Number:		Company Phone Number:		Street:		FEIN:		City:	State:	Zip Code:		Company Name and Address				Company Name:		Domiciled State:		NAIC Number:		Company Phone Number:		Street:		FEIN:		City:	State:	Zip Code:		<p><b>Adding a New State to an Existing Account</b></p> <p>The states listed below require a State Company Code or State License Number. This is a number that the state has assigned to each of your companies by NAIC number. For the states listed below, please complete one form for each NAIC number under which you do business, copying the form if necessary.</p> <p>It is not the responsibility of Siron to validate the information provided. Please type in the boxes to ensure information is accurately relayed.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td colspan="3">Company Name:</td></tr> <tr><td colspan="3">Siron Subscriber (Account) ID:</td></tr> <tr><td>NAIC Number:</td><td colspan="2">EIN Number:</td></tr> <tr><td></td><td style="text-align: center;">State</td><td style="text-align: center;">State Company/License Number</td></tr> <tr><td></td><td>Alabama</td><td></td></tr> <tr><td></td><td>Arkansas</td><td></td></tr> <tr><td></td><td>District of Columbia</td><td></td></tr> <tr><td></td><td>Connecticut</td><td></td></tr> <tr><td></td><td>Florida</td><td></td></tr> <tr><td></td><td>Hawaii</td><td></td></tr> <tr><td></td><td>Iowa</td><td></td></tr> <tr><td></td><td>Illinois</td><td></td></tr> <tr><td></td><td>Kansas</td><td></td></tr> <tr><td></td><td>Louisiana</td><td></td></tr> <tr><td></td><td>Maryland</td><td></td></tr> <tr><td></td><td>Maine</td><td></td></tr> <tr><td></td><td>Massachusetts</td><td></td></tr> <tr><td></td><td>Montana</td><td></td></tr> <tr><td></td><td>Nebraska</td><td></td></tr> <tr><td></td><td>New Hampshire</td><td></td></tr> <tr><td></td><td>New Jersey</td><td></td></tr> <tr><td></td><td>New Mexico</td><td></td></tr> <tr><td></td><td>North Carolina</td><td></td></tr> <tr><td></td><td>North Dakota</td><td></td></tr> <tr><td></td><td>Oklahoma</td><td></td></tr> <tr><td></td><td>South Carolina</td><td></td></tr> <tr><td></td><td>Tennessee</td><td></td></tr> <tr><td></td><td>Virgin Islands</td><td></td></tr> <tr><td></td><td>Washington</td><td></td></tr> <tr><td></td><td>West Virginia</td><td></td></tr> <tr><td></td><td>Wisconsin</td><td></td></tr> </table>	Company Name:			Siron Subscriber (Account) ID:			NAIC Number:	EIN Number:			State	State Company/License Number		Alabama			Arkansas			District of Columbia			Connecticut			Florida			Hawaii			Iowa			Illinois			Kansas			Louisiana			Maryland			Maine			Massachusetts			Montana			Nebraska			New Hampshire			New Jersey			New Mexico			North Carolina			North Dakota			Oklahoma			South Carolina			Tennessee			Virgin Islands			Washington			West Virginia			Wisconsin	
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Section: Complete Vertafore Company Set-up Paperwork

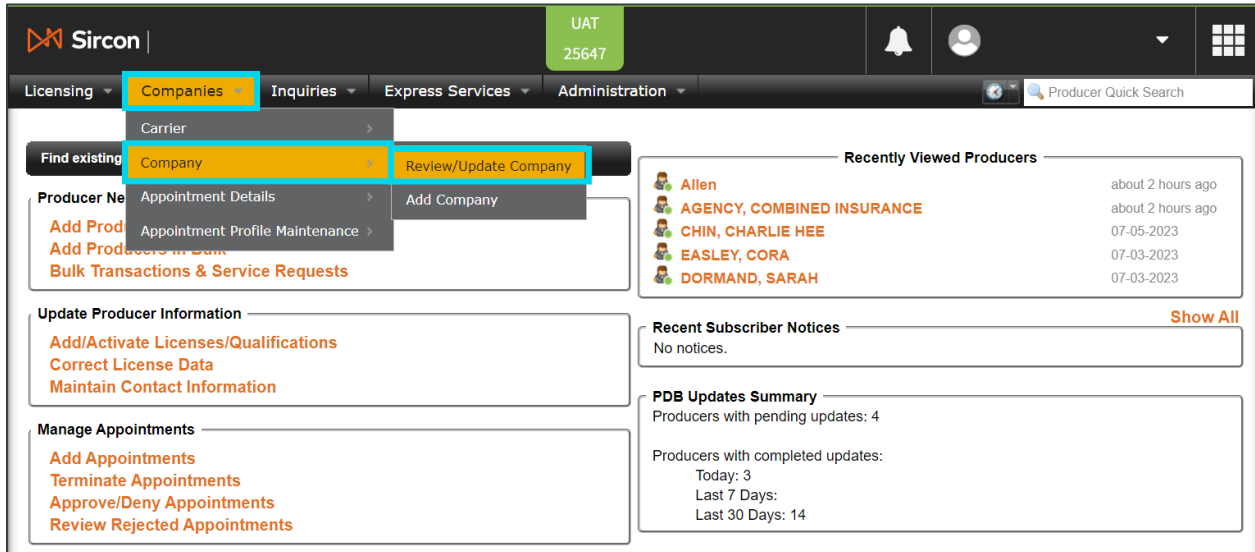
**Supplemental Account Information Change Form Paperwork**

<p><u>Authorized Signer Signature</u></p> <p>For Electronic Appointments/<del>appointments</del>, several states require that company authorized signer information be included in the electronic transaction. Without this information, the state will reject the transactions.</p> <p>You will need to complete one form for each authorized signer and return it to Siron for set up. Please use this form in conjunction with page 5 of this document to indicate which states the Authorized Signer will have connected to their name.</p> <ol style="list-style-type: none"> <li>1. Complete one form for each authorized signer.             <ol style="list-style-type: none"> <li>a. Make copies of this form as needed for additional signers.                 <ol style="list-style-type: none"> <li>i. Please type in the boxes to ensure information is accurately relayed.</li> </ol> </li> </ol> </li> <li>2. The Authorized Signer should print this page and sign it prior to emailing it <a href="#">back</a>.</li> <li>3. Sign in black felt pen or medium-tip black roller ball as this is an imaged <a href="#">document</a>.</li> <li>4. Please keep your entire signature within the lines and do not touch the lines of the <a href="#">box</a>.</li> </ol> <p><u>Authorized Signer Information</u></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20%;">Company Name</td><td></td></tr> <tr><td>Account ID</td><td></td></tr> <tr><td>Name</td><td></td></tr> <tr><td>Title</td><td></td></tr> <tr><td>Phone Number</td><td></td></tr> <tr><td>Email Address</td><td></td></tr> <tr><td>Fax Number</td><td></td></tr> <tr><td>Address</td><td></td></tr> <tr><td>Address Line 2</td><td></td></tr> <tr><td>City, State, Zip</td><td></td></tr> </table> <p><u>Signature of Authorized Signer (person listed above)</u></p> <div style="border: 1px solid black; height: 60px; width: 100%; margin-top: 5px;"></div>	Company Name		Account ID		Name		Title		Phone Number		Email Address		Fax Number		Address		Address Line 2		City, State, Zip		<p><u>Authorized Signer States</u></p> <p>Please use this Form to either:</p> <ul style="list-style-type: none"> <li>• Update an existing Authorized Signer to Add New States under a NAIC</li> <li>• In conjunction with Page 4, to specify which states the listed signer will be <a href="#">connected</a></li> </ul> <p>Please enter the name of each company, the NAIC number, Authorized Signer Name and check the states the person is authorized to sign for. Remember we need a copy of this form for each Authorized Signer. <b>Please type in the boxes to ensure information is accurately relayed.</b></p> <p style="text-align: center;"><b>The states listed below are the states that require an authorized signer.</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;">Company Name:</td> <td style="width: 30%;">NAIC number:</td> </tr> <tr> <td>Authorized Signer Name:</td> <td></td> </tr> <tr> <td colspan="2"><b>Only select the states in which NAIC is currently licensed</b></td> </tr> <tr> <td> <input type="checkbox"/> AR    <input type="checkbox"/> LA    <input type="checkbox"/> NM  <input type="checkbox"/> CT    <input type="checkbox"/> MA    <input type="checkbox"/> NY  <input type="checkbox"/> DC    <input type="checkbox"/> ME    <input type="checkbox"/> OH  <input type="checkbox"/> HI    <input type="checkbox"/> MD    <input type="checkbox"/> SC  <input type="checkbox"/> IL    <input type="checkbox"/> ND    <input type="checkbox"/> WV  <input type="checkbox"/> KS    <input type="checkbox"/> NE  <input type="checkbox"/> KY    <input type="checkbox"/> NJ         </td> <td> <input type="checkbox"/> All States (as listed)  <i>Please only select all states if NAIC is licensed in all listed states</i> </td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;">Company Name:</td> <td style="width: 30%;">NAIC number:</td> </tr> <tr> <td>Authorized Signer Name:</td> <td></td> </tr> <tr> <td colspan="2"><b>Only select the states in which NAIC is currently licensed</b></td> </tr> <tr> <td> <input type="checkbox"/> AR    <input type="checkbox"/> LA    <input type="checkbox"/> NM  <input type="checkbox"/> CT    <input type="checkbox"/> MA    <input type="checkbox"/> NY  <input type="checkbox"/> DC    <input type="checkbox"/> ME    <input type="checkbox"/> OH  <input type="checkbox"/> HI    <input type="checkbox"/> MD    <input type="checkbox"/> SC  <input type="checkbox"/> IL    <input type="checkbox"/> ND    <input type="checkbox"/> WV  <input type="checkbox"/> KS    <input type="checkbox"/> NE  <input type="checkbox"/> KY    <input type="checkbox"/> NJ         </td> <td> <input type="checkbox"/> All States (as listed)  <i>Please only select all states if NAIC is licensed in all listed states</i> </td> </tr> </table>	Company Name:	NAIC number:	Authorized Signer Name:		<b>Only select the states in which NAIC is currently licensed</b>		<input type="checkbox"/> AR <input type="checkbox"/> LA <input type="checkbox"/> NM <input type="checkbox"/> CT <input type="checkbox"/> MA <input type="checkbox"/> NY <input type="checkbox"/> DC <input type="checkbox"/> ME <input type="checkbox"/> OH <input type="checkbox"/> HI <input type="checkbox"/> MD <input type="checkbox"/> SC <input type="checkbox"/> IL <input type="checkbox"/> ND <input type="checkbox"/> WV <input type="checkbox"/> KS <input type="checkbox"/> NE <input type="checkbox"/> KY <input type="checkbox"/> NJ	<input type="checkbox"/> All States (as listed) <i>Please only select all states if NAIC is licensed in all listed states</i>	Company Name:	NAIC number:	Authorized Signer Name:		<b>Only select the states in which NAIC is currently licensed</b>		<input type="checkbox"/> AR <input type="checkbox"/> LA <input type="checkbox"/> NM <input type="checkbox"/> CT <input type="checkbox"/> MA <input type="checkbox"/> NY <input type="checkbox"/> DC <input type="checkbox"/> ME <input type="checkbox"/> OH <input type="checkbox"/> HI <input type="checkbox"/> MD <input type="checkbox"/> SC <input type="checkbox"/> IL <input type="checkbox"/> ND <input type="checkbox"/> WV <input type="checkbox"/> KS <input type="checkbox"/> NE <input type="checkbox"/> KY <input type="checkbox"/> NJ	<input type="checkbox"/> All States (as listed) <i>Please only select all states if NAIC is licensed in all listed states</i>
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## Review/Update Company Information

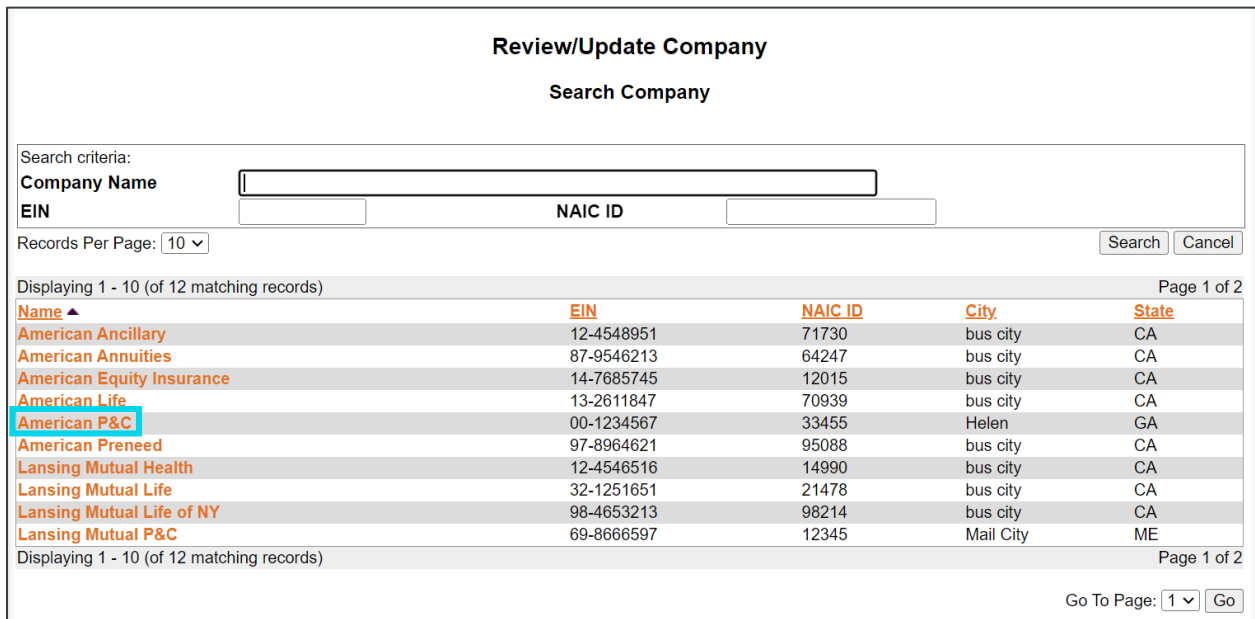
Use the *Review/Update Company* page to view or modify existing company information such as the Name, Employer Identification Number (EIN), NAIC ID, NAIC Group Number, and other details.

1. From the **Companies** menu, click **Company** then click **Review/Update Company**.



The screenshot shows the Siron application interface. The top navigation bar includes 'Licensing', 'Companies', 'Inquiries', 'Express Services', and 'Administration'. The 'Companies' menu is open, showing options like 'Carrier', 'Company', 'Appointment Details', and 'Add Company'. The 'Company' option is selected, and the 'Review/Update Company' option is highlighted. The main content area displays 'Recently Viewed Producers' with a list of names and dates, 'Recent Subscriber Notices', and 'PDB Updates Summary'.

2. You will now see the *Review/Update Company* page. All the companies will appear in a list.
3. Click the **Company Name** to see more details.




The screenshot shows the 'Review/Update Company' page. The page title is 'Review/Update Company' and the subtitle is 'Search Company'. Below the title is a search criteria form with fields for 'Company Name', 'EIN', and 'NAIC ID'. The 'Records Per Page' is set to 10. The search results are displayed in a table with columns for Name, EIN, NAIC ID, City, and State. The table shows 12 matching records, with the first 10 displayed. The 'American P&C' row is highlighted.

Name	EIN	NAIC ID	City	State
American Ancillary	12-4548951	71730	bus city	CA
American Annuities	87-9546213	64247	bus city	CA
American Equity Insurance	14-7685745	12015	bus city	CA
American Life	13-2611847	70939	bus city	CA
American P&C	00-1234567	33455	Helen	GA
American Preneed	97-8964621	95088	bus city	CA
Lansing Mutual Health	12-4546516	14990	bus city	CA
Lansing Mutual Life	32-1251651	21478	bus city	CA
Lansing Mutual Life of NY	98-4653213	98214	bus city	CA
Lansing Mutual P&C	69-8666597	12345	Mail City	ME

### Review Company Details

1. All the details about the company are listed on this page. Click the **Expand** button (+) next to any of the sections to see more information. In this example, we are expanding the **State Appointment Details** section.

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Licensing ▾ Companies ▾ Inquiries ▾ Express Services ▾ Administration ▾
🌐 Producer Quick Search

### Review/Update Company

Search Company

Company Name	EIN	License Number	NAIC ID	City	State
American P&C	00-1234567		33455	Helen	Georgia

**Expand All** (+)

Company Details
State Appointment Details
External System Identifiers
Comment

Contact Information
Aliases

**Company Details** (+)
Top

Company ID

Company Name

EIN

Domicile State

Status

Effective Date

Short Name

NAIC ID

Company Type

**Contact Information** (+)
Top

**State Appointment Details** (+)
Top

**Aliases** (+)
Top

**External System Identifiers** (+)
Top

[Add/Update/Delete External System Identifiers](#)

**Comment** (+)
Top

2. You can now see appointments configured for the selected company by state.

### Review/Update Company

Search Company

Company Name	EIN	License Number	NAIC ID	City	State
American P&C	00-1234567		33455	Helen	Georgia

**Expand All** (+)

Company Details
State Appointment Details
External System Identifiers
Comment

Contact Information
Aliases

**Company Details** (+)
Top

Company ID

Company Name

EIN

Domicile State

Status

Effective Date

Short Name

NAIC ID

Company Type

**Contact Information** (+)
Top

**State Appointment Details** (+)
Top

States	State	Status	Status Date	Company/License Number	Assigned Appointing Authority	
	Georgia	Active	01-01-1900	332211	Stom, Dennis	Edit

[Add New States](#)

**Aliases** (+)
Top

**External System Identifiers** (+)
Top

[Add/Update/Delete External System Identifiers](#)

**Comment** (+)
Top

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Section: Review/Update Company Information

### Edit Company Details

1. From the *Review/Update Company* page, you can edit any field in the **Company Details** section with a white background.
2. The fields you can edit are:
  - **Company Name**
  - **EIN**
  - **Domicile State**
  - **NAIC ID**
  - **Short Name**
3. Edit the field contents then click **Save**.

Review/Update Company

[Search Company](#)

Company Name	EIN	License Number	NAIC ID	City	State
American P&C	00-1234567		33455	Helen	Georgia

Expand All
Company Details
State Appointment Details
External System Identifiers
Comment

Company Details Top

Company ID	2247975	Status	Active	Effective Date	01-01-1900
Company Name	American P&C	Short Name	AMPC	Company Type	Property and Casualty Insurer
EIN	00-1234567	NAIC ID	33455		
Domicile State	Georgia				

Contact Information Top

State Appointment Details Top

States	State	Status	Status Date	Company/License Number	Assigned Appointing Authority	Add New States
<input checked="" type="checkbox"/>	Georgia	Active	01-01-1900	332211	Stom, Dennis	<a href="#">Edit</a>

Aliases Top

External System Identifiers Top

[Add/Update/Delete External System Identifiers](#)

Comment Top

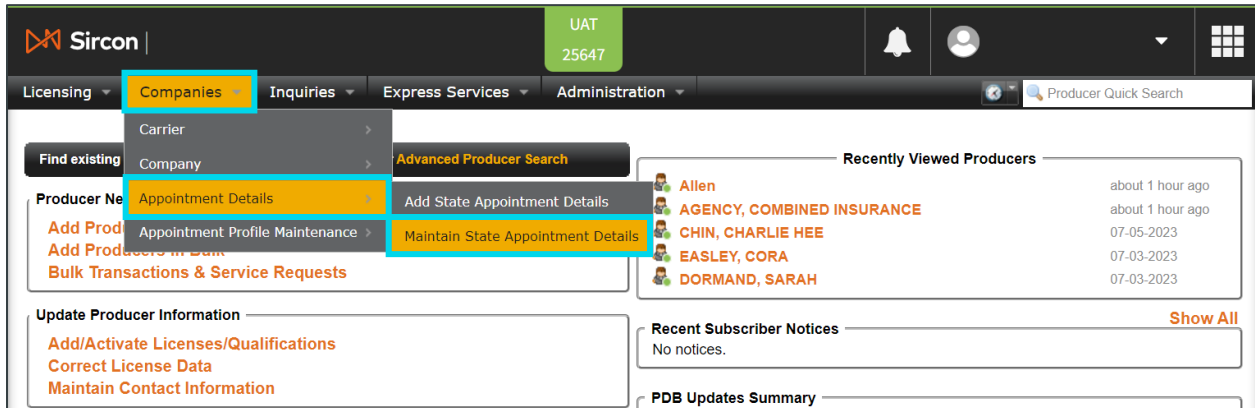
© Vertafore Inc.

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## Maintain State Appointment Details

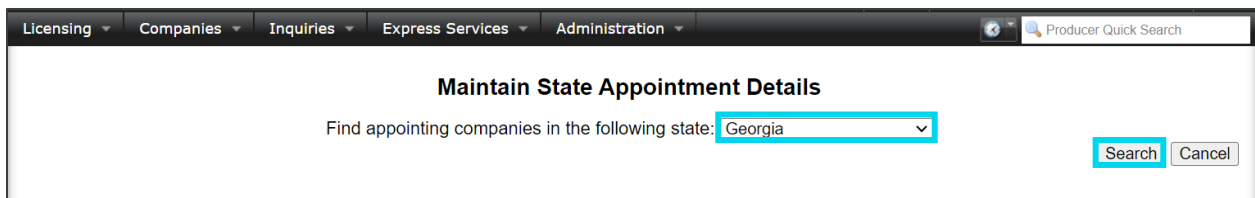
Use the *Maintain State Appointment Details* page to maintain information about available appointment types and appointing authorities for companies in a selected state.

1. From the **Companies** menu, click **Appointment Details** then click **Maintain State Appointment Details**.



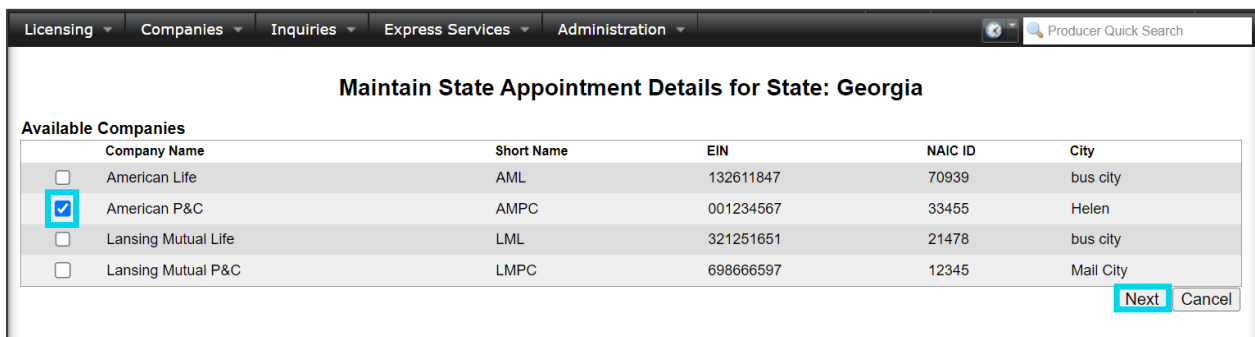
The screenshot shows the Sircon application interface. The 'Companies' menu is open, and the 'Appointment Details' option is selected. The 'Maintain State Appointment Details' option is highlighted in the sub-menu. The interface also shows a 'Recently Viewed Producers' section with a list of producers and their last viewed dates.

2. Select the **State** from the dropdown menu to see a list of companies associated with that state.
3. Click **Search**.



The screenshot shows the 'Maintain State Appointment Details' page. The text reads: 'Find appointing companies in the following state: Georgia'. A dropdown menu is open, showing 'Georgia' selected. There are 'Search' and 'Cancel' buttons.

4. Click the checkmark next to the **Company** you need to edit.
5. Click **Next**.



The screenshot shows the 'Maintain State Appointment Details for State: Georgia' page. It displays a table of available companies with columns for Company Name, Short Name, EIN, NAIC ID, and City. The 'American P&C' company is selected with a checkmark in the checkbox column. There are 'Next' and 'Cancel' buttons at the bottom right.

Company Name	Short Name	EIN	NAIC ID	City
<input type="checkbox"/> American Life	AML	132611847	70939	bus city
<input checked="" type="checkbox"/> American P&C	AMPC	001234567	33455	Helen
<input type="checkbox"/> Lansing Mutual Life	LML	321251651	21478	bus city
<input type="checkbox"/> Lansing Mutual P&C	LMPC	698666597	12345	Mail City

## Section: Maintain State Appointment Details

6. You will now see the *Maintain State Appointment Details for State* page. From here, you can perform the following actions:

- Suspend New Appointments
- Terminate State Appointments
- Remove Appointment Types
- Change the Assigned Appointing Authority

Maintain State Appointment Details for State: Georgia						
<b>Company Name</b>	<b>EIN</b>	<b>License Number</b>	<b>NAIC ID</b>	<b>City</b>	<b>State</b>	
American P&C	00-1234567		33455	Helen	Georgia	
<b>Company/License Number</b>		332211	<b>Assigned Appointing Authority</b>		Stom, Dennis ▾	
<b>Appointment Types</b>						
Appointment Type	Status	Suspend New Appts	Start Date	End Date	Company/License Number	
Carrier Requests	Active ▾	<input type="checkbox"/>	01-01-1900			Terminate
Doesn't Appoint By LOA	Active ▾	<input type="checkbox"/>	01-01-1900			Terminate
No LOA Needed	Active ▾	<input type="checkbox"/>	01-01-1900			Terminate
<b>Appointing Authorities</b>						
<b>Appointing Authority</b>			<b>Begin Date</b>	<b>End Date</b>		
Hall, Lauren			07-06-2023			
Stom, Dennis			07-06-2023			
						Save Cancel

## Suspend New Appointments

When you suspend new appointments, the designated appointment type can no longer be used for future appointments or terminations.

1. Click the checkbox under the **Suspend New Appts** column next to the **Appointment Type** you need to suspend.
2. Click **Save**.

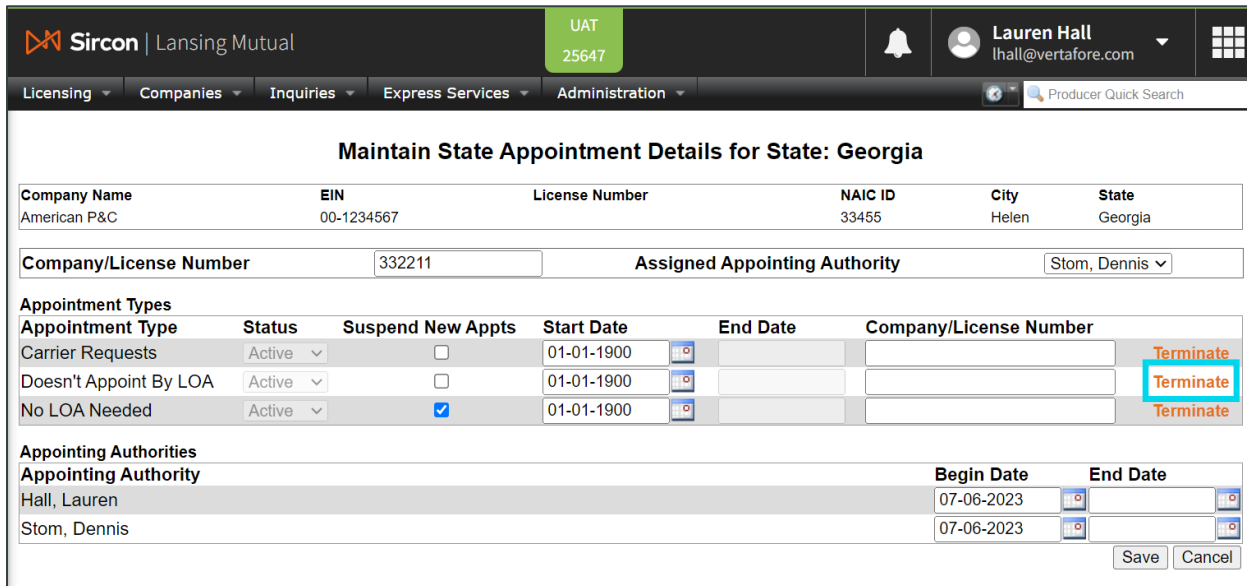
Maintain State Appointment Details for State: Georgia						
<b>Company Name</b>	<b>EIN</b>	<b>License Number</b>	<b>NAIC ID</b>	<b>City</b>	<b>State</b>	
American P&C	00-1234567		33455	Helen	Georgia	
<b>Company/License Number</b>		332211	<b>Assigned Appointing Authority</b>		Stom, Dennis ▾	
<b>Appointment Types</b>						
Appointment Type	Status	Suspend New Appts	Start Date	End Date	Company/License Number	
Carrier Requests	Active ▾	<input type="checkbox"/>	01-01-1900			Terminate
Doesn't Appoint By LOA	Active ▾	<input type="checkbox"/>	01-01-1900			Terminate
No LOA Needed	Active ▾	<input checked="" type="checkbox"/>	01-01-1900			Terminate
<b>Appointing Authorities</b>						
<b>Appointing Authority</b>			<b>Begin Date</b>	<b>End Date</b>		
Hall, Lauren			07-06-2023			
Stom, Dennis			07-06-2023			
						Save Cancel

Section: Maintain State Appointment Details

## Remove Appointment Type

Use the **Terminate** button to unassign the appointment type from the writing company. The company will no longer be able to appoint or terminate producers with the terminated appointment type.

1. Click the **Terminate** button next to the **Appointment Type** that you need to remove.



**Sircon | Lansing Mutual** UAT 25647 Lauren Hall lhall@vertafore.com

Licensing Companies Inquiries Express Services Administration Producer Quick Search

### Maintain State Appointment Details for State: Georgia

Company Name	EIN	License Number	NAIC ID	City	State
American P&C	00-1234567		33455	Helen	Georgia

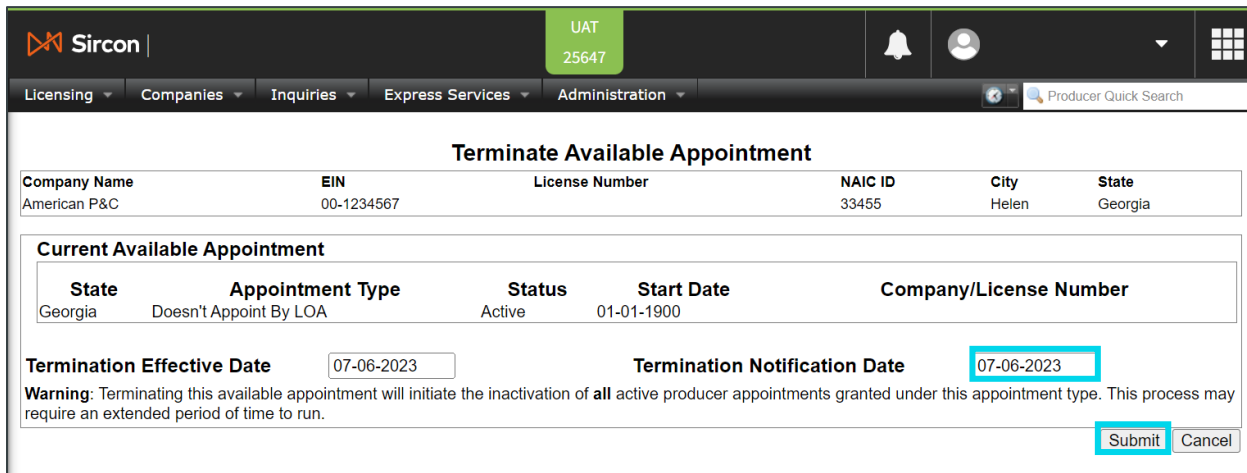
Company/License Number: 332211 Assigned Appointing Authority: Stom, Dennis

Appointment Type	Status	Suspend New Appts	Start Date	End Date	Company/License Number	
Carrier Requests	Active	<input type="checkbox"/>	01-01-1900			Terminate
Doesn't Appear By LOA	Active	<input type="checkbox"/>	01-01-1900			Terminate
No LOA Needed	Active	<input checked="" type="checkbox"/>	01-01-1900			Terminate

Appointing Authority	Begin Date	End Date
Hall, Lauren	07-06-2023	
Stom, Dennis	07-06-2023	

Save Cancel

2. Enter the **Termination Notification Date** in the MM-DD-YYYY format.
3. Click **Submit**.



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Licensing Companies Inquiries Express Services Administration Producer Quick Search

### Terminate Available Appointment

Company Name	EIN	License Number	NAIC ID	City	State
American P&C	00-1234567		33455	Helen	Georgia

**Current Available Appointment**

State	Appointment Type	Status	Start Date	Company/License Number
Georgia	Doesn't Appear By LOA	Active	01-01-1900	

Termination Effective Date: 07-06-2023 Termination Notification Date: 07-06-2023

**Warning:** Terminating this available appointment will initiate the inactivation of all active producer appointments granted under this appointment type. This process may require an extended period of time to run.

Submit Cancel

## Section: Maintain State Appointment Details

- The **Appointment Type** will have a **Status** of **Inactive** and the **End Date** will match the **Termination Notification Date**.

Maintain State Appointment Details for State: Georgia						
Company Name	EIN	License Number	NAIC ID	City	State	
American P&C	00-1234567		33455	Helen	Georgia	
Company/License Number		332211	Assigned Appointing Authority		Stom, Dennis ▾	
<b>Appointment Types</b>						
Appointment Type	Status	Suspend New Appts	Start Date	End Date	Company/License Number	
Carrier Requests	Active ▾	<input type="checkbox"/>	01-01-1900			
Doesn't Appoint By LOA	Inactive ▾	<input type="checkbox"/>	01-01-1900	07-06-2023		
No LOA Needed	Active ▾	<input checked="" type="checkbox"/>	01-01-1900			
<b>Appointing Authorities</b>						
Appointing Authority			Begin Date	End Date		
Hall, Lauren			07-06-2023			
Stom, Dennis			07-06-2023			
						Save Cancel

### Change Assigned Appointing Authority

- You can change the **Assigned Appointing Authority** by clicking the dropdown for the top.

Maintain State Appointment Details for State: Georgia						
Company Name	EIN	License Number	NAIC ID	City	State	
American P&C	00-1234567		33455	Helen	Georgia	
Company/License Number		332211	Assigned Appointing Authority		Stom, Dennis ▾	
<b>Appointment Types</b>						
Appointment Type	Status	Suspend New Appts	Start Date	End Date	Company/License Number	
Carrier Requests	Active ▾	<input type="checkbox"/>	01-01-1900			
Doesn't Appoint By LOA	Inactive ▾	<input type="checkbox"/>	01-01-1900	07-06-2023		
No LOA Needed	Active ▾	<input checked="" type="checkbox"/>	01-01-1900			

- To remove an appointing authority, enter the **End Date** next to the authority then click **Save**.

Maintain State Appointment Details for State: Georgia						
Company Name	EIN	License Number	NAIC ID	City	State	
American P&C	00-1234567		33455	Helen	Georgia	
Company/License Number		332211	Assigned Appointing Authority		Stom, Dennis ▾	
<b>Appointment Types</b>						
Appointment Type	Status	Suspend New Appts	Start Date	End Date	Company/License Number	
Carrier Requests	Active ▾	<input type="checkbox"/>	01-01-1900			
Doesn't Appoint By LOA	Inactive ▾	<input type="checkbox"/>	01-01-1900	07-06-2023		
No LOA Needed	Active ▾	<input checked="" type="checkbox"/>	01-01-1900			
<b>Appointing Authorities</b>						
Appointing Authority			Begin Date	End Date		
Hall, Lauren			07-06-2023	07-06-2023		
Stom, Dennis			07-06-2023			
						Save Cancel

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

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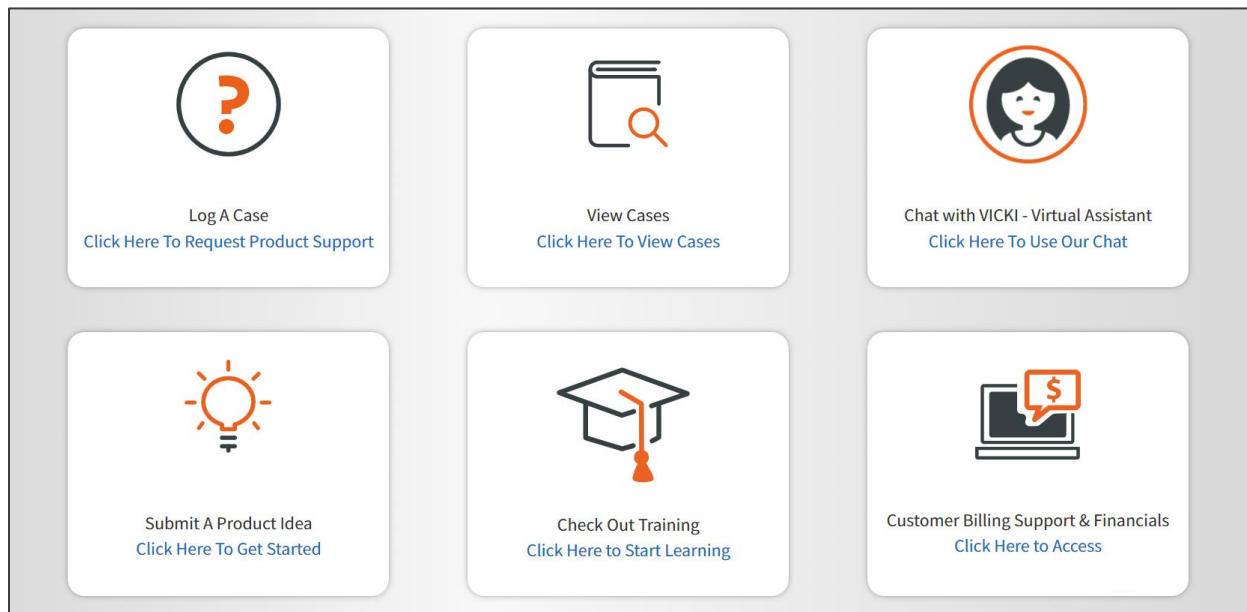
Help is just a click away. Vertafore has two resources available to support you 24/7:

- My Vertafore
- Sircon Support

**My Vertafore**

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

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



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

**Contact Vertafore Customer Support**

Can't find what you are looking for at My Vertafore? Our Customer Support team is here to help. [Click here to email Support](#) or call 877.876.4430.

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***APPENDIX 2: Document History***

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Version	Revision Date	Revision Record
1.0	7/6/2023	Original Document



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

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