Contents

What is PDB? ....................................................... 1
Get started ......................................................... 2
Producer Database Landing Page ......................... 3
PDB Detail Report ................................................ 5
Insurance Carrier Report ....................................... 14
PDB Batch Report ............................................... 18
Company Specialized Report (CSR) ....................... 21
National Producer Number Report ......................... 24
Company Appointment/Termination Report (CAR) .... 25
Company Appointment Reconciliation Report (CARR) 27
Company Appointment Renewals ........................... 30
Account Summary ............................................... 33
Welcome to the National Insurance Producer Registry’s producer database

We appreciate your business and would like to help you become acquainted with the available information. This guide will assist you through your first few times working with the Producer Database (PDB). If you should have any questions, please call us at (816) 783-8467 or email at marketing@nipr.com.

What is the PDB?

The PDB is a repository of comprehensive producer license information provided by the State Insurance Departments. It is designed to assist insurers in exercising due diligence in the monitoring of producers to reduce the incidence of fraud.

These are the products available that utilize the data in PDB.

- PDB Detail Report (PDB)
- PDB Batch Report (PDB Batch)
- Insurance Carrier Report (ICR)
- National Producer Number Report (NPN)
- Company Specialized Report (CSR)
- Company Appointment/Termination Report (CAR)
- Company Appointment Reconciliation Report (CARR)
- Company Appointment Renewal Invoices
- Alerts
Get started

The web address for NIPR is www.nipr.com. From NIPR’s homepage you can access a variety of information such as the National Association of Insurance Commissioners homepage by clicking on the NAIC Link; access the states’ websites by clicking on the link to Departments of Insurance sites; read current updates about NIPR in the latest New Releases; view upcoming events that NIPR will be attending soon; sign up to become a member of the Focus Group.

To access PDB, go to NIPR’s homepage http://www.nipr.com/ click the Log In to PDB> Link. You will be directed to the User Log-In Page.

Enter your User ID and password. These are provided to you by your company administrator. Keep them safeguarded, as you are responsible for their usage. Now click on Login
Producer Database Landing Page

The landing page is your homepage for the PDB. From the landing page you are able to select reports to request, view the status of previously requested reports, purchase your reports and view/download your reports. In addition to being a centralized place to view your activity within the PDB, NIPR Marketing can send you a personalized message that will display on your homepage. All notifications regarding the PDB data will be listed here as well.

To Select a Report to Request
Select a report from the Create Reports menu on the left hand side of the screen.

To View the Status of Requested Reports:
Find your desired report on the Report Summary list. To browse your reports use the page forward and back buttons, or click on the specific page number. View the Status in the Status Column.

Reasons for Failure:
- No data was found for the producers and states submitted
- A system error occurred during the processing of your request

Statuses are:
- Pending: The request has not completed yet
- Complete: The request is complete and the report can be purchased
- Failed: An error has occurred during the processing of the report. Please submit your request again
To Purchase a Completed Report
Find your desired report on the Report Summary list and verify the Status in the Status Column is Complete. Click the blue Purchase link next to the Completed status.

A window will pop up displaying the price for the report, contract rates may apply. Click the yellow Purchase button if you still wish to purchase the report, at this point you will be charged.

You will have 7 days to purchase your report. After 7 days have passed, if you have not purchased your report, it will be deleted and no charge will be incurred.
To Delete or Cancel a Report
Find your desired report on the Report Summary list. Click the yellow Delete button next to the report. The Delete button will remove the report from your report list and therefore cancel the request if the report has not yet completed.

If you delete a report that has previously been purchased, the charge will not be reversed.

PDB Detail Report
The detail report will provide information about agents/producers, agencies or companies from all the states that are supplying information.

Select Detail Report from the Create Reports Menu
You will be directed to the PDB Detail Search page. On this page you will enter in search criteria to find your desired producer in the PDB that you wish to retrieve a report on.

To Perform an Individual Search
Select the Person tab from the left hand side of the screen. The following fields will be available to search by: SSN, Last Name, First Name, Middle Name, and NPN.
Enter your desired search criteria and click Search.

**Individual Search Criteria Rules:**

- When searching by SSN the Last Name is required. No wildcard is allowed on the SSN. The entire SSN must be entered.
- When searching by Last Name the SSN, NPN, or First Name is required.
- When searching by First Name or Middle Name the Last Name is required. Wildcard is only allowed on either the First Name or the Last Name but not both.
- When searching by Last Name at least 2 characters must be entered, including spaces, before the wildcard can be used.
- When searching by First Name at least 2 characters must be entered, including spaces, before the wildcard can be used.
- When searching by Middle Name at least 1 character must be entered, including spaces, before the wildcard can be used.
- When searching by NPN no wildcard is allowed. The entire NPN must be entered.

Wildcard is denoted by asterisk (*).

For example, we will be using “John Doe”. We entered the last name “Doe” and the first name as “Jo*”. This was done because the PDB entry could be listed as John or “Jonathan”, depending on how the state(s) supplied the information. After entering the information click Search. The system will search the PDB and provide a listing of entries matching the information entered. This is called the “Person Search Results” screen.
For our example this “Person Search Results” screen shows all individuals with the last name “Doe” and a first name starting with “Jo”. This screen will also display the National Producer Number, resident state, and date of birth to help identify the correct entry.

⚠️ Up to this point, you have not been charged. Once you click on the name “Doe John B,” you will be taken to the Producer overview screen. Once you select your report type and click submit, you will be charged.
This is the first page of the “Detail Report”. Under the name is the Resident State and National Producer Number. This is a 10-digit number shown without the leading zeros. Each entity in the PDB is assigned a unique number. This can be used as an identifier and should be captured in any spreadsheets or files on licensing. We know from the previous screen that only demographics and license/appointment information available.

This page shows us all the states that have submitted data to the PDB on this individual. They are highlighted and underlined. The “*” indicate those states which have submitted company appointment information. (This is important later on).

This screen shows the producer’s demographics: date of birth and address information and any other names the agent might have used for licensing (i.e. maiden name, middle name, middle initial). As you continue down the page, you will find the license/appointment summary. The license/appointment summary provides the state of licensure, license numbers, issue date, expiration date, class, resident status, and whether the license is active.
### License/Appointment Summary

**STATE: FL**

<table>
<thead>
<tr>
<th>Company Name</th>
<th>FEIN/Cocode</th>
<th>Line Of Authority</th>
<th>Status/Reason</th>
<th>Status/Renewal Date</th>
<th>CE Credits Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allstate Life Ins Co 0503</td>
<td>12-3526789</td>
<td>Life with Variable Annuities</td>
<td>Active</td>
<td>10/03/1994</td>
<td>N/S</td>
</tr>
<tr>
<td>Merrill Lynch Life Ins Co 6590</td>
<td>98-7654321</td>
<td>Life, Health &amp; Variable Annuities</td>
<td>Canceled</td>
<td>10/03/1994</td>
<td>N/S</td>
</tr>
</tbody>
</table>

This is individual appointment information. Shown are the name of the company, FEIN or NAIC Cocode of the appointing company, line(s) of authority and status, dates and renewal. At the bottom of the report, it will list any Regulatory Actions (RIRS), if taken. We will also indicate when no information is available for a particular item.
To Perform a License Search

Select the License tab from the left hand side of the screen. The following fields will be available to search by: License Number, State, and Agent/Agency.

Enter your desired search criteria and click Search.

License search criteria rules:
- When searching by License Number the License State is required.
- When searching by License Number the wildcard is not allowed. The entire License Number must be entered.
- Agent/Agency is required.

To Perform a Business Search

Select the Business tab from the left hand side of the screen. The following fields will be available to search by: FEIN, Agency Name, and Entity ID.

Enter your desired search criteria and click Search.
Business search criteria rules:

- When searching by FEIN no wildcard is allowed. The entire FEIN must be entered.
- When searching by Agency Name at least 4 characters must be entered, including spaces, before the wildcard can be used.
- When searching by Entity ID no wildcard is allowed. The entire Entity ID must be entered.

Wildcard is denoted by asterisk (*).

If more than one record is found to match your search criteria then all records will return in the Search Results hit list. If only one match is found then the hit list will be bypassed.

For individual results it will contain the Last Name, First Name, Middle Initial, Date of Birth, Resident State and National Producer Number of the matches. For Business results it will contain the FEIN, Name, Entity ID, and Resident State.

On the list locate your desired producer by either paging through the matches or filtering the matches. You may filter the list by First Name, Last Name, or State for Individuals and FEIN or Agency Name for Agencies. To browse the list click the forward and back buttons or click on a specific page number.
After locating your desired carrier click the Select button. You will be directed to the Report Options page.

At this point you have not been charged.

PDB Detail Report Options Page

After selecting your desired producer you are directed to the PDB Detail Report Options Page. On this page you will have the opportunity to narrow down the set of data that is returned in the report.

Select a Report Type

Select one of the six available report types from the bottom left-hand menu.

Report Types:

- All Available Info: Returns all information available in the database for the producer including Demographics, Licenses, Appointments, Regulatory Actions, etc.
- License Only: Returns all License information and Regulatory Action information available in the PDB.
- Appt/Term Information: Returns all of the Appointment and Termination information and Regulatory action information available in the PDB.
- Regulatory Actions Only: Will only return all of the Regulatory Actions available in the PDB.
- All Resident State Data: Returns all information related to the producers resident state(s) and all Regulatory Action information.
- Customized Report: Allows you to further narrow down the results of the report.
Select a Customized Report

Select Customized Report from the Report Type menu. Additional options will display for you to choose from.

Additional Report Options:

- Select All: Returns all information available in the database for the producer including Demographics, Licenses, Appointments, Regulatory Actions, etc.

- Show Demographics: Returns all Demographic information and Regulatory Action information available. Demographics include names, addresses, and date of birth.

- Show License Info: Returns all License information and Regulatory Action information available in the PDB

- Show Appt/Term: Returns all of the Appointment and Termination information and Regulatory Action information available in the PDB.

After selecting your desired options, select which states you wish to return on the report. You may select one to all states. If you selected Show License Info then you will also be able to select a specific license status to return on the report.

License Statuses:

- Active

- Inactive

- Active, including Future Licenses (Licenses that have not yet taken effect.)

- All categories

If you selected Show Appt/Term then you will also be able to select specific company appointments to return on the report by selecting one to all of the companies listed under the Available Companies section.

The list of companies you are allowed to choose from is based on your list of affiliations for your company.

After selecting your report options click the Submit button and your report will return shortly. Once you have clicked Submit you have been charged. However, if you want to change the report options selected after viewing the report you may do so without being charged again. Simply close the report that was returned; change your report options, and click Submit again.
If you decide you do not wish to run a report on the selected producer click the Cancel button, no charge will be incurred. You will be directed back to the search page where you can choose a different producer from the Hit List or perform a new search.

Insurance Carrier Detail Report

Select Insurance Carrier Report from the Create Reports Menu. You will be directed to the Insurance Carrier Search page. On this page you will enter in search criteria to find your desired insurance carrier in the PDB to retrieve a report on.

To Perform a Company Search
Select the Company tab from the left hand side of the screen. The following fields will be available to search by: Cocode, Company Name, and FEIN.

Enter your desired search criteria and click Search.

Company search criteria rules:

- When searching by Cocode no wildcard is allowed. The entire Cocode must be entered.
- When searching by FEIN no wildcard is allowed. The entire FEIN must be entered
- When searching by company name at least 4 characters must be entered before wildcard can be used.

Wildcard is denoted by asterisk (*).
To Perform a License Search

Select the License tab from the left hand side of the screen. The following fields will be available to search by: License Number and License State.

Enter your desired search criteria and click Search.

License Search Criteria Rules:

- License Number and State are required. No wildcard are allowed.

If more than one record is found to match your search criteria then all records will return in the Company Search Results hit list. If only one match is found then the hit list will be bypassed. The list will return the Company Name, Cocode, FEIN, and Domicile State.

Locate your desired company on the list by either paging through the matches or filtering the matches. You may filter the list by Company Name, Cocode, FEIN, and State. To browse the list click the forward and back buttons or click on a specific page number.
After locating your desired carrier click the Select button. You will be directed to the Report Options page.

At this point you have not been charged.

Insurance Carrier Detail Report Options Page

After selecting your desired company you are directed to the Insurance Carrier Detail Report Options and Customize Page. On this page you will have the opportunity to narrow down the set of data that is returned in the report.

Select a Report Type
Select one of the five available report types.

Report Types:

- All Available Info: Returns all information available in the database for the company including Demographics, Licenses, Regulatory Actions, etc.
- License Only: Returns all License information and Regulatory Action information available in the PDB.
- Regulatory Actions Only: Will only return all of the Regulatory Actions available in the PDB.
- All Domicile State Data: Returns all information related to the company’s domicile state and all Regulatory Action Information.
- Customized Report: Allows you to further narrow down the results of the report.

Select a Customized Report

Select Customized Report from the Report Type menu. Additional options will display for you to choose from.

Additional Options:

- Select All: Returns all information available in the database for the company including Demographics, Licenses, Regulatory Actions, etc.
- Show Demographics: Returns all Demographic information and Regulatory Action information available. Demographics include names and addresses.
- Show License Info: Returns all License information and Regulatory Action information available in the PDB.
After selecting your desired options, select which states you wish to return on the report. You may select one to all states.

If you selected Show License Info Only then you will also be able to select a specific license status to return on the report.

**License Statuses:**
- Active
- Inactive
- Active, including Future Licenses (Licenses that have not yet taken effect.)
- All categories

After selecting your report options click the Submit button and your report will return shortly.

> Once you have clicked Submit you have been charged. However, if you want to change the report options selected after viewing the report you may do so without being charged again. Simply close the report that was returned, change your report options, and click Submit again.

> If you decide you do not wish to run a report on the selected carrier click the yellow Cancel button, no charge will be incurred. You will be directed back to the search page where you can choose a different carrier from the list or perform a new search.
PDB Batch Report

If you have a large number of producers to enter, you can enter them in a Batch Request. This Batch Request will return the same information as the Detail Report.

Select Batch Report from the Create Reports menu on the left hand side of the screen. You will be directed to the Format and Method screen. Select the format and method you wish to enter producers by.

Available Formats:

- SSN, Last Name
- FEIN
- State, License Number, Agent/Agency
- National Producer Number/Entity ID

Available Methods:

- Manual: Manually enter producers one at a time
- Text: Copy and Paste a list of producers into a text box
  - Format Examples:
    - SSN, Last Name = xxxxxxxxx, Doe
    - State, License Number, Agent/Agency = MO, xxxxxx, Agent
    - Only one record per line may be entered
- File: Upload a .CSV or .TXT file of producers
  - Format Examples:
    - SSN, Last Name = xxxxxxxxx, Doe
    - State, License Number, Agent/Agency = MO, xxxxxx, Agent
    - Only one record per line may be entered

You may use multi-formats and methods to enter producers within a single session.
After selecting a method the appropriate entry box will display. Enter your producers accordingly. For Example if you select State, License ID, Agent/Agency as your format and Text as your method the following screen displays.

After entering several records it would look like this

After clicking the Add Records button, the submitted producers will display in the Submitted Records table.

All producers will be noted as either Valid and Invalid. Click the Invalid Records tab to view invalid entries. If you have any invalid entries you may re-enter the producer with corrections. You may also delete any producers from the list of submitted records.

After entering all producers you wish to return on the report you may select which states you wish to return on the report. You may select one to all states. (Not all states will return data for the producers submitted).
You may also enter a report title of your choosing or use the pre-populated default title. Then select the format you wish to receive the report in. Available formats for the PDB Batch report are DHTML or XML. Finally, if desired, schedule the report to run at a later date and time. This is recommended for larger requests.

After completing all selections Submit the report. You will be directed to the Landing Page. Your request will display in the Report Summary listing with a status of Pending. Once the status is complete you may purchase the report.

![Image of report interface]

Depending on the amount of information gathered, the report could take a while to generate.
Company Specialized Report (CSR)

The company Specialized Report allows you to create a report specific to your needs by selecting from the various fields in the PDB.

Select Company Specialized Report from the Create Reports menu on the left hand side of the screen. You will be directed to the Report Options page.

On this page you may select up to four of the eleven options available.

Options are:

- **License Options:** *
  - License Class
  - License Expiration Date
  - License Issue Date
  - License Active Status
  - Resident/Non-Resident

- **Line of Authority Options:** **
  - LOA Active Status
  - LOA Issue Date from <date> to <date>

- **Regulatory Action Options:**
  - RIRS Penalties/Fines/Forfeitures
  - Reason for Action
  - RIRS Date of Action from <date> to <date>
  - RIRS Effective Date from <date> to <date>
After selecting your options, click Submit Options. You will be directed to the Format and Method screen.

Select the format and method you wish to enter producers

- Available Formats:
  - SSN, Last Name
  - FEIN
  - State, License Number, Agent/Agency
  - National Producer Number/Entity ID

- Available Methods:
  - Manual: Manually enter producers one at a time (up to ten per screen).
  - Text: Copy and Paste a list of producers into a text box.
    Format Examples:
    - SSN, Last Name = xxxxxxxxx, Doe
    - State, License Number, Agent/Agency = MO, xxxxxx, Agent
    - Only one record per line may be entered
  - File: Upload a .CSV or .TXT file of producers
    Format Examples:
    - SSN, Last Name = xxxxxxxxx, Doe
    - State, License Number, Agent/Agency = MO, xxxxxx, Agent
    - Only one record per line may be entered

You may use multi-formats and methods to enter producers within a single session. A maximum of 10,000 valid producers may be submitted for a single report.

After selecting a method the appropriate entry box will display. Enter your producers accordingly. The submitted producers will display in the Submitted Records table.
All producers will be noted as either Valid or Invalid. Click the Invalid Records tab to view invalid entries. If you have any invalid entries you may re-enter the producer with corrections. You may also delete any producers from the list of submitted records.

After entering all producers you wish to return on the report you may select which states you wish to return on the report. You may select one to all states. Not all states will return data for the producers submitted.

You may also enter a report title of your choosing or use the pre-populated default title. Then select the format you wish to receive the report in. Available formats for the CSR are DHTML, CSV, or XML. Finally, if desired, schedule the report to run at a later date and time. This is recommended for larger requests.

After completing all selections Submit the report. You will be directed to the Landing Page. Your request will display in the Report Summary listing with a status of Pending. Once the status is complete you may purchase the report.

Reports will stay available for 7 days before they are deleted.
Request a National Producer Number Report

Select National Producer Number Report from the Create Reports menu on the left hand side of the screen. You will be directed to the Format and Method page. Here, you will have to select the method you wish to enter producers by.

- **Available Formats:**
  - SSN, Last Name

- **Available Methods:**
  - Manual: Manually enter producers one at a time (Up to ten per screen).
  - Text: Copy and Paste a list of producers into a text box
    - Format: xxxxxxxxxx, Doe
    - Only one record per line may be entered
  - File: Upload a .CSV or .TXT file of producers
    - Format: xxxxxxxxxx, Doe
    - Only one record per line may be entered

You may use multi-formats and methods to enter producers within a single session. A maximum of 50,000 valid producers may be submitted for a report.

After selecting a method the appropriate entry box will display. Enter your producers accordingly.

The submitted producers will display in the Submitted Records table.
All producers will be noted as either Valid or Invalid. Click the Invalid Records tab to view invalid entries. If you have any invalid entries you may re-enter the producer with corrections. You may also delete any producers from the list of submitted records.

After entering all producers you wish to return on the report enter a report title of your choosing or use the pre-populated default title. A default title is already populated and may be used. Then select the format you wish to receive the report in. Available formats for the NPN are HTML, CSV, or XML. Finally, if desired, schedule the report to run at a later date and time. This is recommended for larger requests.

Submit the report. You will be directed to the Landing Page. Your request will display in the Current Reports table with a status of Pending. Once the status is complete you may purchase the report.

**Company Appointment/Termination Report (CAR)**

The CAR provides a listing of active appointments, terminations or appointment/termination history for a specific company in a specific state. The report will give you the National Producer Number, last four digits of the SSN for individuals or entire FEIN for business entities, date of birth, line of authority (if reported), effective date of the appointment, renewal date and the active license number.

Select Company Appointment/Termination Report from the Create Reports menu on the left hand side of the screen. Then select a company for the list of affiliated companies presented.

Only companies affiliated with you will be displayed. If you do not see a company that should be on your list please contact NIPR Marketing at (816)783-8467 or marketing@nipr.com.
After selecting a company, a list of states in which the company has either appointments or terminations will display. Please select which state(s) you wish to receive reports; one state, multiple states of all states that the company is licensed in.

Each state will return and be billed as a separate report.

After selecting your desired state(s), select the type of appointments you wish to return for each state. You may select to have only appointments return, or only terminations, or both. Then select whether or not you only want Individual Producers, Agency Producers or both Individuals and Agencies to return.

After selecting your appointment and producer types select what format you would like the report returned. Available formats for the CAR are HTML, XML, .CSV, and Colon-Delimited.

Submit the report. You will be directed to the Landing Page. A request will display for each state you selected with a status of Pending. Once the status is complete you may purchase the reports.
Company Appointment Reconciliation Report (CARR)

The CARR is designed to facilitate the appointment renewal process for Regulators and for the insurance industry. As a NIPR customer you can use the CARR to create a listing of your active appointments for a specific company in a specific state. This report is similar to the CAR, however, the CARR has the added functionality of completing “Not for Cause” terminations, directly from the report. This allows you to reconcile your company’s agent listing against the PDB. The terminations are generated electronically through the NIPR Gateway and sent to the appropriate state insurance department for processing.

The completed report will look as follows:

<table>
<thead>
<tr>
<th>Demographics</th>
<th>Names Provided By State:</th>
</tr>
</thead>
<tbody>
<tr>
<td>FEIN:</td>
<td>ABC INS COMPANY</td>
</tr>
<tr>
<td>Date Updated</td>
<td></td>
</tr>
<tr>
<td>Business Address</td>
<td>8765 INSURANCE AVE</td>
</tr>
<tr>
<td>ANYTOWN, MO 64111</td>
<td></td>
</tr>
<tr>
<td>No Of Two Tier Appointments:</td>
<td>24</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>National Producer Number</th>
<th>FEIN/Code/State</th>
<th>Date Of Birth</th>
<th>Name</th>
<th>Line of Authority</th>
<th>Status Effective Date</th>
<th>Appt Renewal Date</th>
<th>Active License Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>5684565</td>
<td>1234</td>
<td>02/05/1955</td>
<td>SMITH, JOHN B</td>
<td>Casualty</td>
<td>05/132002</td>
<td>456789</td>
<td></td>
</tr>
<tr>
<td>5684565</td>
<td>1234</td>
<td>02/05/1955</td>
<td>SMITH, JOHN B</td>
<td>Property</td>
<td>05/132002</td>
<td>456789</td>
<td></td>
</tr>
</tbody>
</table>
Select Company Appointment Reconciliation Report from the Create Reports menu on the left hand side of the screen. Then, select a company for the list of affiliated companies presented.

Only companies affiliated with you will be displayed. If you do not see a company that should be on your list please contact NIPR Marketing at (816)783-8467 or marketing@nipr.com.

After selecting a company, a list of states in which the company has appointments will display. Only a select number of states currently utilize the CARR. Please select which state(s) you wish to receive reports on.

Each state will return as a separate report.

After selecting your desired state(s), select whether or not you only want Individual Producers, Agency Producers, or both Individuals and Agencies returned.

Then select what format you would like the report to return in. Available formats for the CARR are HTML, XML, and .CSV.

HTML should always be returned.
Submit the report. You will be directed to the Landing Page. A request will display for each state you selected with a status of Pending. Once the status is complete you may purchase the report.

In the third column titled: “Termination Reason” the report will default to “Do Not Terminate”. If you wish to terminate a specific appointment, you will need to select a termination reason from the drop down list. These reasons will vary from state to state, depending on that states valid termination reasons.

<table>
<thead>
<tr>
<th>Producer Information</th>
<th>Active License #’s</th>
<th>Termination Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>AFFINITY INS SERV</td>
<td>943</td>
<td>Inadequate Production</td>
</tr>
<tr>
<td>FEIN: 232594445</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A20 INS</td>
<td>878</td>
<td>Voluntary Termination</td>
</tr>
<tr>
<td>FEIN: 334435956</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ALASKA SERVICE</td>
<td>2336</td>
<td>Do Not Terminate</td>
</tr>
<tr>
<td>FEIN: 31566667</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

After selecting which appointments you want to terminate, you will click Review terminations at the top of the page. It will summarize your terminations and ask for and authorizing persons name and title. Once you have reviewed the terminations, you will need to click Submit.
This will create the termination transactions that will be sent through the NIPR Gateway to the respective insurance department. These transactions will be billed at your current appointment/termination rate. You can view the status of your transactions by selecting View Terminations from the report selection screen.

This screen will be updated as we receive information on the transactions from the state insurance departments. You will want to check it daily until all of your terminations have been processed.

Company Appointment Renewals

Renewing company appointments with the states can be a very labor intensive process for both the state and the industry. NIPR’s Electronic Company Appointment Renewal invoicing was designed to be a cost-effective method for renewing company appointments through the Gateway. A renewal invoice is created for the company based on active appointments in the Producer Database.
NIPR collects payment on behalf of the states, and creates electronic renewal transactions that are sent to the state for processing. NIPR currently offers electronic company appointment renewal invoices for selected States. Visit https://www.nipr.com/html/renWelcome.htm, for the most recent list.

The Departments of Insurance will provide companies notice of electronic appointment renewal processing with National Insurance Producer Registry (NIPR). The NIPR website will have the renewal invoice and a list of appointment renewals due for renewal.

Follow the links to company appointment renewals from the home page of www.nipr.com and sign-in using your company identifiers: company, Cocode, FEIN, or company name.

NIPR customers can access their company appointment renewals after logging into PDB and choosing Company Appointment Renewals from Select Report Type.

Your electronic appointment renewal will be displayed. You can Print/Pay the invoice; View the report of appointment renewals; Print the Report; Download the Report as text (delimited); and Download the Report as XML.
If you are paying by credit card (Visa, MasterCard or American Express) or utilizing the electronic check process, the entire process will be electronic, and an appropriate receipt will be displayed for you to print.

Help screens and NIPR Customer Service are available to guide you through the process.

**NIPR Transaction Fees**

<table>
<thead>
<tr>
<th>Transaction Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>NIPR Renewal processing fee will equal 1% of the total state fee charged with a minimum of $5.00 and maximum of $1000.00.</td>
</tr>
</tbody>
</table>

**Example:**

<table>
<thead>
<tr>
<th># of apps</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>$10.00</td>
<td>$1000.00</td>
</tr>
</tbody>
</table>

Transaction fee is 1% of $1000.00 or $10.00

*NIPR fees are not refundable

**ACH SET UP:** Some banks or companies may require a pre-authorization to use this electronic check service. If you need to set up this service with your financial institution, this NIPR ACH-ID will be required: 9098504041

To correctly update your invoice status, please make payments directly to NIPR as instructed on the website. These payments will be forwarded to the state the same day, and the invoice will be reflected as paid.

When your payment is received, electronic renewal transactions will be sent to the State automatically update the State license system. The state in turn will upload the information to the PDB.
Account Summary

The Account Summary allows you to retrieve a history of reports run by you up to two years in the past by report type.

Select the account number, date range, and report you wish to view the history for.

Administrators can view any account under their associated customers. Regular users can only view their own account.

The select View to view the HTML version, or Download(CSV) to receive the report in CSV format.

We hope these instructions help explain NIPR Products. If you have any questions, please feel free to call us at 816-783-8467 or email at marketing@nipr.com.

We value you as a customer and appreciate your business. All NIPR products are designed to be an aid to completing the licensing puzzle for regulators and the insurance industry. We welcome your comments to improve our products and our service to you - our customer. If we can be of further service, please do not hesitate to contact us. Thank you.