

NIPR PDB Reports User Guide

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Overview

The Producer Database (PDB) is a repository of credentialing information that helps the industry's ability to track important information regarding licensed insurance professionals. It includes licensing information from all 50 states, the District of Columbia, Guam, Puerto Rico, and the US Virgin Islands.

To provide a more comprehensive producer profile, the PDB includes data from external databases such as the Regulatory Information Retrieval System (RIRS).

Benefits of PDB Reports

- Financial and time savings
- Reduction in paperwork
- Verification of license status in all participating states
- A single source of data compared to gathering data from multiple state websites

PDB Reports

The following are the NIPR reports that pull data from the PDB repository:

- [Detail Report](#) – Get PDB data for a single producer.
- [Batch Report](#) – Get PDB data for multiple producers.
- [Company Appointment Report](#) – Get a current listing of appointments and terminations for a specific company in a specific state.
- [National Producer Number Report](#) – Get the National Producer Numbers (NPNs) for multiple producers.
- [Insurance Carrier Report](#) – Get details on an insurance carrier such as the company's demographic information (company name, CoCode, FEIN, and domicile state), active licenses, and regulatory actions taken against that company.

In addition, you can use the [Account Summary Report](#) to see the reports your company ran in the past 2 years.

PDB data updates

The PDB is updated every weeknight after business hours. Because NIPR pulls the latest changes from the states and territories, there may be a lag between when you submit a license request or change and when it appears in the PDB.

NIPR does NOT determine who is licensed. NIPR can send each state licensing requests, but the requests still need to be processed and reviewed by the states before showing up in the PDB.

PDB data retention policy

The information contained in the PDB is subject to the [Fair Credit Reporting Act \(FCRA\)](#):

- Only entities with a permissible purpose can access this information.
- In compliance with FCRA, all adverse data **over 7 years old** is eliminated from the NIPR reports. Adverse data includes regulatory information (RIRS) and any inactive license or appointment information.
- Individual states maintain their own data-retention policies which may be *more* restrictive than the FCRA policy.

Log in to PDB Reports


1. Go to <http://nipr.com/>.
2. Click the **Products & Services** menu and select **Producer Database (PDB)**.
3. In **Current Subscribers**, click **Login**.
4. Enter your username and password.
5. Click **Log In**.

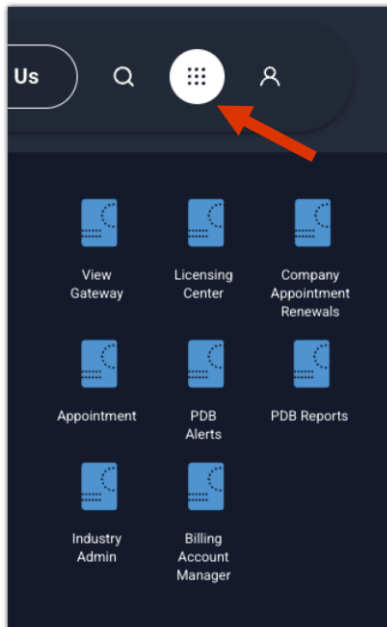
PDB Reports opens.

Switch to another NIPR app

Once you've logged in to PDB Reports, you can then navigate to other NIPR tools.

To switch to another NIPR app:

1. After logging in to PDB Reports, in the upper-right, click the App menu .



A menu of apps that you have access to appears.

2. Select the app you would like to use.
You are rerouted to the selected app.

Forgot password


To reset your password:

1. On the NIPR login, click **Forgot Password**.
2. *Enter your username and click **Search**.*
3. Answer your security questions and click **Check Answers**.
If you do not know the answers to the security questions, contact businessdevelopment@nipr.com to reset them.
4. Enter your new password and click **Change Password**.
You're sent an email alerting you of the password change.
5. Click **Continue**.
You're logged out of the application.

6. Go back to the login screen and log in with your new password.

Update password

To change your password after you have already logged in:

1. In the upper-right of PDB, click profile .
2. Select **Change password**.
3. Enter your current password and click **Continue**.
4. Enter your current password again and click **Continue**.
5. Click **Change Password**.
You're sent an email alerting you of the password change.
6. Click **Continue**.
You're logged out of the application.
7. Go back to the login screen and log in with your new password.

Still can't log in?

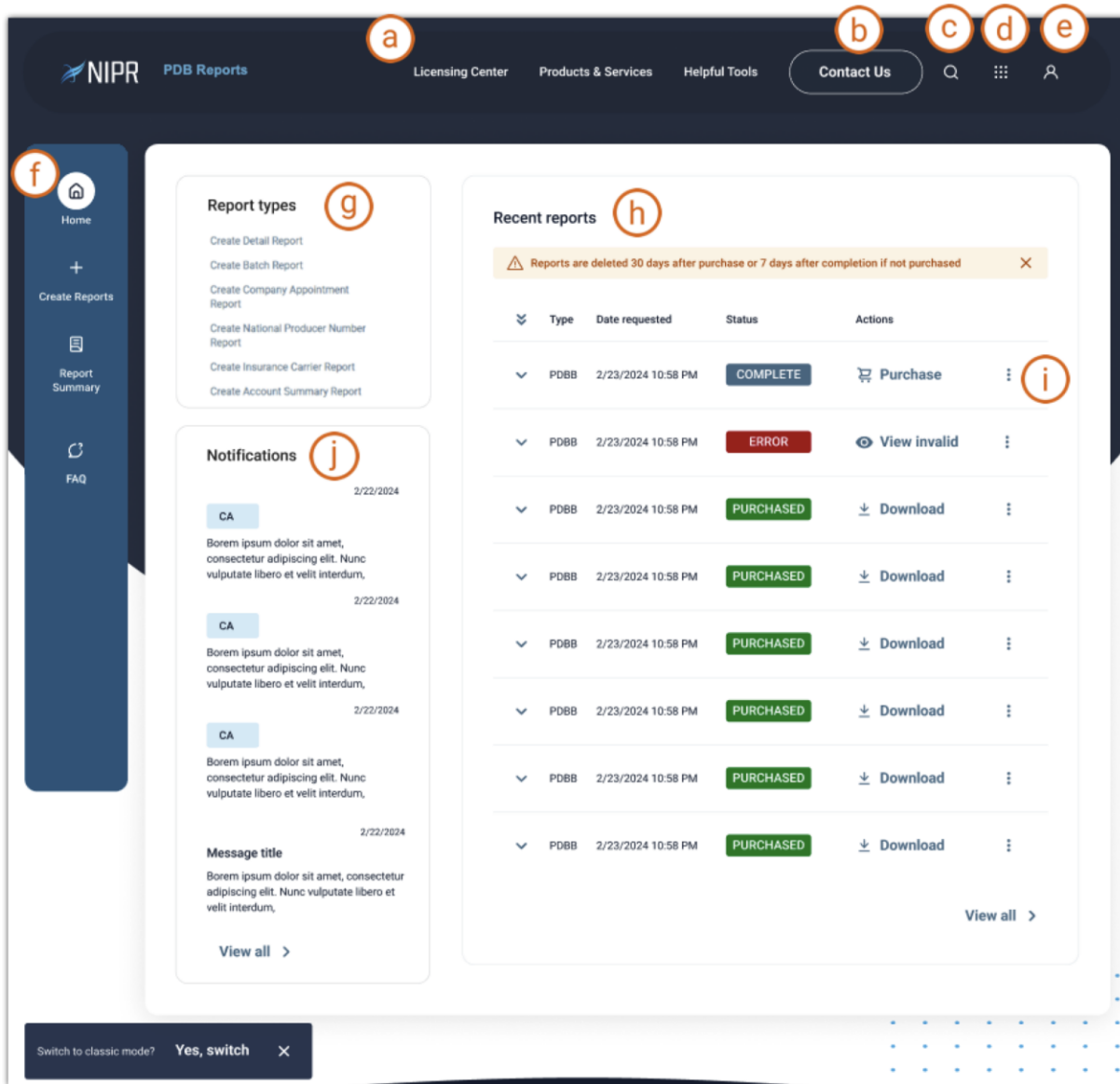
If your account has been locked, you do not know your username and password, you can't reset your password, or if you have any other trouble logging in, contact your Industry Administrator for assistance.

PDB Reports reference






Use PDB Reports to create and purchase PDB reports.

Considerations

Features shown in PDB Reports are permission dependent. There may be features shown in this guide that you do not have access to and cannot see in your view of PDB Reports. If you need access to a feature, contact your Industry Administrator.



Item	Description	Actions
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a	Nipr.com navigation	Click any of these menus to go to that section of nipr.com.
b	Contact Us	Click Contact Us to create a ticket and get NIPR support.
c	Search	Click Search  to find information on nipr.com.
d	App menu	Click the App menu  to go to another NIPR app you have access to such as: <ul style="list-style-type: none"> • Billing Account Manager • Industry Administrator • PDB Alerts
e	Profile	Click profile  to see your information, change your password, or log out of the app.
f	PDB Reports navigation	Click the following in PDB Reports navigation: <ul style="list-style-type: none"> • Home – Return to the PDB Reports home page (shown above). • Create Reports – Run a report. • Report Summary – Shows a list of the Batch, Company Appointment, and National Producer Number reports. • FAQ – See frequently asked questions about PDB Reports.
g	Report types	Shows the different types of reports you can create as well as quick links to create that report.
h	Recent reports	Shows a list of requested reports and their status. <p>Note: Reports are automatically deleted 30 days after purchase date. Reports that you don't purchase are deleted 7 days after the report was created.</p> <p>Possible report statuses:</p> <ul style="list-style-type: none"> • Pending – Report is still being generated. • Complete – Report is done and ready for purchase. • Purchased – Report has been paid for and is available for download. <p>Error – Report may not have been completed because there was no data found or because of a system error.</p>
i	Action menu 	Click the Action menu  and select from the following possible actions:

		<ul style="list-style-type: none"> • Download – Click to download a copy of the report. Option available after the report is purchased. • Delete – Remove the report from the Report summary. • View invalid – See invalid NPNs in the report that returned no data. (Only shown when there are invalid records.) • View error – See more details about an error and how to resolve it.
j	Notifications	See previews of NIPR product and state licensing updates. Click View all to see more detail.

Run a Detail report

Step 1: Search for a person, license, or business

1. Create a report by doing one of the following:
 - From the homepage in Report types, click **Create Detail Report**.
 - In the left navigation, click **Create Reports** and select **Detail Report**.
2. Select a tab to search by:
 - a. **Person** – Find an individual by Social Security Number, name, or National Producer Number (NPN).
 - b. **License** – Find an individual or business by license number, state, and license type.
 - c. **Business** – Find a business by Federal Employer Identification Number (FEIN), business name, or NPN.
3. Enter the search criteria.
4. Click **Search**.

Step 2: Pick your report type

1. Select the **Type** of information you would like to see in your report:
 - a. **All available information** - All information available in the PDB for the producer including demographics, licenses, appointments, regulatory actions, etc.
 - b. **License only** – All license information and regulatory action information available in the PDB.

- c. **Appt/Terminations only** – All appointment and termination information and regulatory action information available on the PDB.
 - d. **Regulatory actions only** – All the Regulatory Actions available in the PDB.
 - e. **All resident state data** – All information related to the producers’ resident states and all regulatory action information.
 - f. **Customized report** – Define the states, license statuses, and affiliated companies you want in your report:
 - i. **Select all** – Returns all the information available in the PDB for the producer including demographics, licenses, appointments, regulatory actions, etc.
 - ii. **Show license information** - All license information and regulatory action information available in the PDB.
 - iii. **Show demographics** – Name, address, date of birth, and regulatory action information available in the PDB.
 - iv. **Show appt/term** - All appointment and termination information and regulatory action information available on the PDB. This option allows you to select specific company appointments for any of the companies listed in Affiliated companies.
2. Select the **Format** for the report.
 3. (*Optional*) For a Customized report, select the following:
 - a. **Available states** – Select the states you would like to get a report on that appear in the PDB. **Select all** is selected by default.
 - b. **License status** – **All categories** is selected by default. Select one or more of the following:
 - i. **Active** – Approved by the state
 - ii. **Pending** – Waiting for state approval
 - iii. **Inactive** – No longer a valid license
 - c. **Affiliated companies** – Select companies that are associated with your parent company that you would like to see in the report.

Note: *This option only appears when you selected Show appt/term in the previous step. This list shows “No company available” if no affiliated companies have been added. If you need affiliated companies added, contact businessdevelopment@nipr.com.*

4. Click **Create**.
You are charged for the report.
5. Do one of the following:
 - Click **View** to access the report.
 - In the green message that appears in the bottom-left, click **Create another Detail**.
Tip: *Click the X to close the Create another Detail message.*

Change report options after viewing Detail Report

If you need to change the report options after viewing a Detail report, you won't be charged a second time.

1. Close the report you were viewing.
2. Change your options.
3. Click **Create**.
The updated report is generated.
4. Click **View** to access the report.

Run a Batch Report

Note: *Large Batch Reports may take longer to generate.*

Step 1: Name your report

1. Create a report by doing one of the following:
 - From the homepage in Report types, click **Create Batch Report**.
 - In the left navigation, click **Create Reports** and select **Batch Report**.
2. In Title, enter the name of your new report.
Tip: *You can also wait to title your report until after adding records or use the default name provided.*
3. Select the report **Format**.

Step 2: Add records

1. Click **Add records**.
The Add records window appears.
2. Pick the format of how you would like to add records to report on:
 - a. **National Producer Number** – Enter the NPNs of producers.

- b. **SSN, Last name** – Enter the Social Security Number and full last name of producers.
- c. **FEIN** – Enter the Federal Employer Identification Number for the business.
- d. **State, License ID, Agent/Agency** – Enter the state of licensure, license ID, and whether it is an agent or agency as shown on the license.
- e. **Entity ID** – Enter the ID the state has given your entity. (This ID may match the NPN number).

Tip: We recommend using the NPN or FEIN instead of Entity ID.

- 3. Select the states you want data for in your report.

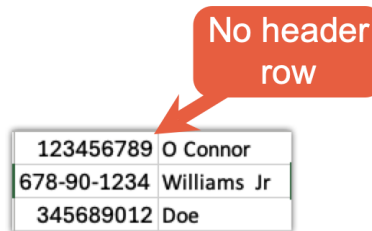
Note: It's possible that some of the selected states may not have any data for the report. In that case, the report will not include that state.

- 4. In Method, select how you would like to add the record information.

Tip: You can use multiple methods to add records within a single session.

- a. **Upload** – Upload a CSV or TXT file with producer information that matches the format you selected.

Note: CSV and TXT files must contain only data rows. No header rows are allowed. Example:



123456789	O Connor
678-90-1234	Williams Jr
345689012	Doe

Note: When uploading a CSV or TXT with names that have punctuation in them such as “O’Connor” and “Williams, Jr.,” do NOT include the punctuation. See the example above.

- b. **Single** – Enter the information for a single producer one at a time.
- c. **Multiple** – Enter each record on a separate line. Examples:
 - i. **SSN, Last name:** 123456789, Doe State
 - ii. **State, License ID, Agent/Agency:** MO, 123456, Agent

- 5. Click **Add**.

The window closes and the records are added to the report. Records are noted as Valid or Invalid.

Step 3: Correct invalid records and create report

1. Click the **Invalid records** tab to identify records that won't return any results.
Tip: If needed, you can re-enter any invalid producer information with corrections. You can also delete any valid records you no longer want to report on.
2. Click **Create**.
The report appears in the Report summary with a Pending status. After the report is complete, you can purchase the report.

Run a Company Appointment Report

The Company Appointment Report provides a listing of active appointments, terminations, or appointment / termination history for a specific company in a specific state. The report returns the:

- National Producer Number
- Last 4 digits of the Social Security Number for individuals, OR
- Entire FEIN for business entities
- Date of birth
- Line of authority (if reported)
- Effective date of the appointment
- Renewal date
- Active license number

NIPR collects payment on behalf of the states and creates electronic renewal transactions that are sent to the state for processing. See [Appointment Renewals](#) for payment options.

1. Create a report by doing one of the following:
 - From the homepage in Report types, click **Create Company Appointment Report**.
 - In the left navigation, click **Create Reports** and select **Company Appointment Report**.
2. Select the **Type** of information you would like to see in your report:
 - a. **All** – Includes both individual and agency producers.
 - b. **Individual only** – Includes individual producers only.
 - c. **Agency only** – Includes agency producers only.
3. Select the **Report type**:

- a. **Appointments only** – All appointment information and regulatory action information available on the PDB.
 - b. **Terminations only** – All terminations information and regulatory action information available on the PDB.
 - c. **All** – All appointments, terminations, and regulatory action information available in the PDB.
4. Select the **Format** for the report.
 5. Select the states you would like included in the report.
***Note:** Each state is returned and billed as a separate report.*
 6. Click **Create**.
A report for each state appears in the Report summary with a Pending status. Once the report status is Complete, you can purchase the report.

Run a National Producer Number Report

You can run a report on up to 50,000 valid producers in a single session.

Step 1: Name your report

1. Create a report by doing one of the following:
 - a. From the homepage in Report types, click **Create National Producer Number Report**.
 - b. In the left navigation, click **Create Reports** and select **National Producer Number Report**.
2. In Title, enter the name of your new report.
***Tip:** You can also wait to title your report until after adding records or use the default name provided.*
3. Select the report **Format**.

Step 2: Add records

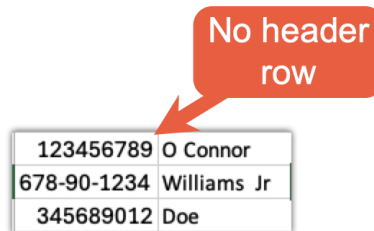
1. Click **Add records**.
The Add records window appears.
2. Pick the format of how you would like to add records to report on:
 - a. **SSN, Last name** – Enter the Social Security Number and full last name of producers.
 - b. **FEIN** – Enter the Federal Employer Identification Number for the business.

- c. **State, License ID, Agent/Agency** – Enter the state of licensure, license ID, and whether agent or agency is shown on the license.
3. In Method, select how you would like to enter the record information:

Tip: You can use multiple methods to add records within a single session.

- a. **Upload** – Upload a CSV or TXT file with producer information that matches the format you selected.

Note: CSV and TXT files must contain only data rows. No header rows are allowed. Example:



123456789	O Connor
678-90-1234	Williams Jr
345689012	Doe

Note: When uploading a CSV or TXT with names that have punctuation in them such as “O’Connor” and “Williams, Jr. ”, do NOT include the punctuation. See the example above.

- b. **Single** – Enter the information for a single producer one at a time.
 - c. **Multiple** – Enter each record on a separate line. Examples:
 - i. **SSN, Last name:** 123456789, Doe State
 - ii. **State, License ID, Agent/Agency:** MO, 123456, Agent
4. Click **Add**.
- The window closes and the records are added to the report. Records are noted as Valid or Invalid.*

Step 3: Correct invalid records and create report

1. Click the **Invalid records** tab to identify records that won’t return any results.

Tip: If needed, you can re-enter any invalid producer information with corrections. You can also delete any valid records you no longer want to report on.
2. Click **Create**.

The report appears in the Report summary with a Pending status. After the report is complete, you can purchase it for free.

Run an Insurance Carrier Report

1. Create a report by doing one of the following:
 - From the homepage in Report types, click **Create Insurance Carrier Report**.
 - In the left navigation, click **Create Reports** and select **Insurance Carrier Report**.
2. Click one of the following tabs:
 - **License** – Search by the license number.
 - **Company** – Search by CoCode, Company name, or FEIN.
3. Click **Search**.
The search results appear.
4. (Optional) If multiple results appear, click **Select** in the row of the desired insurance carrier.
Tip: *You can sort and filter the table of results to find your result more quickly.*
5. Click **Create**.
6. Click **View** to access the report.

Change report options after viewing Insurance Carrier Report

If you need to change the report options after viewing an Insurance Carrier report, you won't be charged a second time.

1. Close the report you were viewing.
2. Change your options.
3. Click **Create**.
The updated report is generated.
4. Click **View** to access the report.

Purchase a completed report

Once a report is completed, you have 7 days to purchase it before it is automatically deleted.

1. In the row of the report you would like to download, click **Purchase**.
A confirmation dialog appears.
2. Click **Yes, purchase**.
The report is now available for download.

Download a report

Download a report when you want to save a copy of the report outside of PDB Reports.

Tip: *If a report is about to be automatically deleted, you can download a copy of the report and keep it on your computer instead.*

To download a purchased report:

1. Locate the report you would like to download in the report summary.

Note: *You must purchase the report before you can download it.*

2. Click the Action menu ☰.
3. Select **Download**.

A copy of the report is downloaded to your computer.

Delete a report

To manually delete a report from the Report summary list:

1. In the Report summary, click the **Action** menu ☰ of a pending report.
2. Select **Delete**.
3. In the confirmation dialog that appears, click **Yes, delete**.

The report is deleted and no longer appears in the report summary.

Use wildcards in search

Wildcards are asterisks (*) that can stand in for unknown letters in your search terms. They can be helpful when you search for terms that may vary in spelling.

Note: *You cannot use wildcards when searching by SSN.*

Example

Type "Ab*" to find all individuals with a last name that starts with "Ab" such as Abbot or Abernathy.

Wildcards are allowed in the PDB app search in the following instances:

- In either the first or last name fields, but not both.
 - Enter at least 2 characters (including spaces) before using a wildcard.
- In the middle name.
 - Enter at least 1 character before using a wildcard.

- In a company or agency name.
 - Enter at least 4 characters (including spaces) before using a wildcard.

See report history

The Account Summary allows you to search reports your company ran in the past 2 years.

Note: *If you are an Administrator, you can view any account under your associated customers.*

1. Create a report by doing one of the following:
 - a. From the homepage in Report types, click **Create Account Summary Report**.
 - b. In the left navigation, click **Create Reports** and select **Account Summary Report**.
2. In Select criteria:
 - a. **From and To** – Pick date range from within the past 2 years.
 - b. **Select account IDs** – In the drop down that appears, select the account IDs you would like to search.
3. Select the type of report.
4. Click **View**.

The reports for that time period are listed. Reports are grouped by Account ID.
5. (Optional) For each Account ID row, click the drop-down on the far left to see each ID's report details.
6. (Optional) Click **Download (CSV)** to export a copy of this list to your computer.