

Home

This is the start page for the Appointments and Terminations application.



Home



[Supported States](#)

[New A&T Workflow](#)

[Cart](#)

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Work in Progress

Options	Description ↕	Ref. Number ↕	Status ↕	Last Modified ▾
Delete	Peachtree Cas Ins Co - 25755 Appointment	504301	In Cart	09/18/2017 09:43 AM
Continue Delete	Farm Bureau Prop & Cas Ins Co - 13773 Appointment	504300	In Progress	09/18/2017 09:42 AM
Continue Delete	Allstate Ins Co - 19232 Termination	504299	In Progress	09/18/2017 09:39 AM
Continue Delete	Peachtree Cas Ins Co - 25755 Appointment	504298	In Progress	09/18/2017 09:34 AM

Total row count: 4

From this screen, users can select the following actions:

- **Create New A&T Workflow:** To start a new appointment or termination workflow, click on the New A&T Workflow button.
- **Work with Existing Workflows:**
 - **Continue Existing Workflow:** To continue a previously created workflow, click on the "Continue" link located next to the desired item in the Work in Progress list.
 - **Delete an Existing Workflow:** To delete a previously created workflow, click on the "Delete" link located next to the desired item in the Work in Progress list.
 - **Pay for Items in Cart:** If you have an existing workflow in the cart, ready for payment, you can pay for it by clicking on the "Cart" button.
- **View Order History:** If you wish to view your order history, click on the "Order History" button.
- **View Supported States:** To view a list of the states that this application supports, click on the "Supported States" link at the bottom left of the screen.

Select Company and Product

This page is used to select the desired product (appointments or terminations) and company for this workflow.



Select Company and Product



Company

Producers

States

Lines

Review

Checkout



Please select one: Appointments Terminations

Select	Company Name ↕	CoCode ↕	FEIN ↕
<input type="radio"/>	Peachtree Cas Ins Co	25755	581548761
<input type="radio"/>	Affiliated Fm Ins Co	10014	050254496
<input type="radio"/>	Genworth Mortgage Ins Corp Of NC	16675	560729821
<input type="radio"/>	National Union Fire Ins Co Of Pitts	19445	250687550
<input type="radio"/>	Insurance Co Of The State Of PA	19429	135540698
<input type="radio"/>	Allstate Ins Co	19232	360719665
<input type="radio"/>	Farm Bureau Prop & Cas Ins Co	13773	420331872
<input type="radio"/>	Mount Vernon Fire Ins Co	26522	231575334

Total row count: 8 [Select other company](#)

<< Back Select Appointments or Terminations and an Affiliated Company. **Next Step >>**

To complete this page, please complete the following steps:

1. To select a product, click on the Appointments or Terminations radio button located above the list of available companies. You can only select one for a given workflow.
2. To select a company, click on the radio button for the desired company from the provided list of available companies. You can only select a single company for a given workflow.
 - **Please Note:** If you do not see your desired company, use the "Select Other Company" link located near the bottom right of the screen, above the "Next Step" button, to open a pop-up window to search for a company by Cocode or FEIN.
3. When you have made your selections, click the "Next Step" button to continue to the Select Producers screen.

From this screen, clicking on the "Home" icon or "Back" button will take you back to the Home page.

Select States and Jurisdictions

This page is used to select the state or states for this workflow. From the available list of states provided, you must select at least one state, and can select multiple (or all) states if desired.

The available states and jurisdictions are displayed in the Available States list. The state or states you select for this workflow will display in the Managed States list.



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Select States & Jurisdictions

Terminations for Allstate Ins Co - 19232

Select states where you plan to terminate Lines of Business.

Please note...

- The list of 'Available States' has been limited by current eligibility, or availability considerations for processing of Appointments or Terminations. For more information see the following links.
[Supported States](#)

Available States

- ALABAMA
- ARKANSAS
- CALIFORNIA
- DELAWARE
- DISTRICT OF COLUMBIA
- GEORGIA
- HAWAII
- IDAHO
- IOWA
- KANSAS

Managed State(s)

- CONNECTICUT

Ctrl + Click to select multiple states

<< Back Next Step >>

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To select a state or jurisdiction:

1. Click on the desired state/jurisdiction from the Available States list and then click the top arrow button to move the selected item to the Managed States list.
2. To select multiple states, hold down the "Cntrl" key while selecting them.
3. To select all available states, click on the second arrow button to immediately move all available states to the Managed States list.

To remove a state or jurisdiction:

1. Click on the desired state/jurisdiction from the Managed States list and then click the third arrow button (second from bottom) to move the selected item back to the Available States list.
2. To select multiple states, hold down the "Cntrl" key while selecting them.
3. To clear the Managed States list, click on the bottom arrow button to immediately move all selected states back to the Available States list.

Once you have selected the desired state or states, click the "Next Step" button to continue to the Select Lines screen. Clicking on the "Back" button will return you to the Select Producers screen.

You can review the supported states for this application by clicking on the "Supported States" link.

Select Producers

This page is used to add or remove selected producers for this workflow.



Select Producers

Terminations for Allstate Ins Co - 19232



[Company](#)

Producers

[States](#)

[Lines](#)

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+ Search for Producer(s)		- Remove Selected Producer(s)		
Remove <input type="checkbox"/>	Name ↕	DOB	NPN ↕	FEIN ↕
<input type="checkbox"/>	GREEN, FOREST R	07/07/1977	17489695	

<< Back Next Step >>

Adding/Removing Producers

Please use the following steps to add or remove a producer using this page:

- To **add a producer**, click on the "Search for Producers" link to open the Producer Search pop-up. From there, you can search for single or multiple producers.
- To **remove a producer**, mark the checkbox next to that producer and click the "Remove Selected Producers" link.

When you have added the desire producer or producers, click the "Next Step" button to continue to the Select States and Jurisdictions page. Clicking the "Back" button will return you to the Select Company page.

Single Producer Search

This pop-up is used to search for a single producer to add to the Select Producers page. To access it, click the "Search for Producers" link located on the Select Producers page.

Producer Search



Single Producer Search Multi-Producer Search

Choose the search category (individual, business, or license) that describes your available information. ?

Individual Search	Business Search	License Search
SSN: <input type="text"/> ?	FEIN: <input type="text"/> ?	License Id: <input type="text"/>
Last Name: <input type="text"/> ?	Name: <input type="text"/> ?	License State: <input type="text"/>
First Name: <input type="text"/> ?	NPN: <input type="text"/> ?	License Type: Any <input type="text"/>
Middle Name: <input type="text"/> ?	Clear Search	Clear Search
NPN: <input type="text"/> ?		
Clear Search		

[Close Search](#)

Searching for a Single Producer

To search for a producer using this window, please complete the following steps:

- **Individual Search:** To search for an individual person, enter their biographic information into the Individual Search fields.
 - If searching by SSN, a Last Name is also required.
 - If searching by First Name and/or Middle Name, a Last Name is required.
- **Business Search:** To search for a business, enter their FEIN, Name, and/or NPN into the Business Search fields.
- **License Search:** To search using an existing license, enter the License ID, License State, and License Type into the License Search fields.
 - The License ID and License State are required fields. The License Type is optional.

If your search is a success, the window will display the individual or business that matches your provided information.

Adding a Producer

To add the producer returned by your search to the Select Producers page, click the "Add Selected Producers" button, and then click the "Close Search" link to return to the Select Producers page.

Multi-Producer Search

This pop-up is used to search for a single producer to add to the Select Producers page. To access it, click the "Search for Producers" link located on the Select Producers page, and then click on the "Multi-Producer Search" tab.

Producer Search



Single Producer Search **Multi-Producer Search**

Choose the column layout that describes your data, then input your data. ?

Details

— Column/Data Layout — — Data Input —

SSN, Last Name ?

FEIN ?

State, License ID, Individual/Business Entity ?

National Producer Number ?

Upload a file Clear Search

Close Search

Searching for Multiple Producers

To search for producers using this window, please complete the following steps:

1. Select the desired criteria type you wish to use, such as SSN and Last Name, or FEIN.
2. Enter the search criteria in the Data Input box.
 1. To enter multiple items, enter them line by line (that is, enter the first item, press return, enter the second item, etc.). Putting multiple items on the same line, or using punctuation (for example, "123, ABC"), will result in an error.
 2. If desired, you can upload a document containing your data by clicking on the "Upload a file" link - you will be prompted to search for and add the desired file.
3. Click the "Search" button to execute your search.

The results of your search will display, and are organized as described below.

Viewing Results

On the results page, your results are organized into the following tabs:

- **Found on PDB:** Producers that match your search criteria and exist in the PDB are returned here. You can select these producers to be added to this workflow.
- **Not Found:** This tab lists the search data that were not found in the PDB. For example, if NPN "1234567" doesn't exist in the PDB, it would appear here.
- **Invalid:** This tab lists any search data that was not recognized by the system. For example, entering "123, ABC" as an NPN will result in the system returning this as an invalid search value.

Only the results on the "Found on the PDB" list can be added to your workflow.

Adding Producers

To add producers from the "Found on PDB" list, check the checkbox for each producer you wish to add, and then click the "Add Selected Producers" button.

Click the "Close Search" link to return to the Select Producers page.

Select Lines

This page is used to select the lines you wish to appoint or terminate for the selected producers. If multiple states were selected, these selections are done by state.



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Select Lines

Appointments for Peachtree Cas Ins Co - 25755

[Company](#) [Producers](#) [States](#) [Lines](#) [Review](#) [Checkout](#) [?](#)

< AL AR CT DC DE GA HI IA ID KS **KY** LA MN MS MT ND NE NV NY OK PA SC SD TN TX >

Producer Info	Effective Date	Casualty	Credit
GREEN, FOREST R NPN: 17489695 DOB: 07/07/1977 License Id: DOI-324465 License Class: Agent	09/18/2017	<input type="checkbox"/>	<input type="checkbox"/>

<< Back Select Lines of Business for the desired Producers and States. Next Step >>

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If multiple states are involved, this page will display a row of state tabs to allow you to navigate between states. Selected states that have no available lines to select for appointment or termination are marked with a red "no" symbol.

Selecting Lines for Appointment or Termination

To select a line, please complete the following steps:

1. Mark the checkbox associated with the relevant producer and line to include that appointment or termination in your workflow.
2. Select or edit (if allowed) the Effective Date for each selected line. Please note that, dependent on state rules, the Effective Date may be limited to the current day, or to a certain range of dates.
3. When you have finished your selections, click the "Next Step" button to continue to the Review page.

As stated, if multiple states are involved, you will need to use the state tabs to navigate to each state and make the relevant selections for that state. The checkboxes in the column headers can be used to select or de-select all eligible producers for that line.

Clicking the "Back" button will return you to the Select States and Jurisdictions screen.

Please Note: If you have multiple workflows in the system, the application will prevent duplicates by not allowing you to add a line to this workflow if that selection already exists in your cart. For example, in the screenshot above, the user is unable to select the Casualty line for this producer because this selection is in an existing workflow already in his or her cart.

Review

This page is used to review your appointment or termination selections for the current workflow.



Review Appointment(s)

Appointments for Peachtree Cas Ins Co - 25755



[Company](#)

[Producers](#)

[States](#)

[Lines](#)

[Review](#)

[Checkout](#)



Remove Selected Item(s)					
Remove		Producer Name	State	License Info	Lines
<input type="checkbox"/>		GREEN, FOREST	KY	License ID: DOI-324465 License Class: Agent	Credit

Total row count: 1

LEGEND: Producer information is complete. Additional Producer information is required. Click on image for details.

<< Back All information must be complete in order to proceed to cart. Please correct or remove producers with errors. Next Step >>

From here, you can select to remove one or more selected items, or return to the previous screens to edit your work. Clicking the "Back" button will return you to the Select Lines screen.

Remove Items

To remove a producer, mark their checkbox and then click the "Remove Selected Items" link. The system will remove the selected item or items and update your workflow accordingly.

Proceed to Checkout

When you are satisfied with your workflow, you can proceed to the checkout page by clicking the "Next" button. Be aware that once you do so, this workflow will be added to your cart, and individual items can no longer be edited (although they can still be deleted, as can the overall workflow itself as well).

Any edits, such as changing the selected lines or adding a producer, that need to be made after adding a workflow to the cart will require deleting the existing workflow and starting over with a new one.

Checkout

This page is used to view and pay for the item or items in your cart. For each item, you can view a summary of its details, and the associated state and other fees. A fee summary of your current order total is also provided.



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Cart/Checkout



Select	Appointer	Summary	License Info	State Fee	State Late Fee	State Other Fee	Fee Total
<input type="checkbox"/>	Peachtree Cas Ins Co	GREEN, FOREST R Appointment in KY	License ID: DOI-324465 License Class: Agent	\$50.00	\$0.00	\$0.00	\$50.00
<input type="checkbox"/>	Peachtree Cas Ins Co	GREEN, FOREST R Appointment in KY	License ID: DOI-324465 License Class: Agent	\$50.00	\$0.00	\$0.00	\$50.00

Save selected item(s) for later. Delete selected item(s)

Total row count: 2

Fee Summary
Total State Fees: \$100.00
Total NIPR Fees: \$6.00
Grand Total: \$106.00

Note:
• NIPR Fees are not refundable.
• Cart contents will be deleted at midnight, Central Standard Time (CST), if payment is not made.

Checkout >>

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From this page, the following actions can be performed:

- **Deleting Items:** To delete an item from your cart, mark the checkbox next to it and click the "Delete Selected Items" link. The system will remove the selected item or items, and update your fee summary.
- **Save Selected Items:** To save an item, which will keep it in your cart but not include it in the current checkout process, mark the checkbox next to it and click the "Save Selected Items for Later" link. The system will remove the selected item or items from your current order, and update your fee summary accordingly.
 - If you save an item or items, and then complete your current order, your saved items will automatically populate your cart the next time you view your cart from the home screen.
 - Saved items are automatically returned to your cart if you leave this screen before completing your order. That is, if you save an item or items, and then leave this screen without completing the order, when you return to this screen later, those items will be returned to the cart.
- **Checkout:** To begin the payment process for this order, click the "Checkout" button. You will be asked to pay by Credit Card (including PayPal), or by eCheck. After entering and processing your payment information, you will be taken to the Thank You page.

Clicking on the "Back" button before beginning the payment process will return you to the Review screen.

Thank You

After successful payment of an order, this page provides you with several options in regards to continuing your work with NIPR applications.



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APPOINTMENTS
& TERMINATIONS 

Thank You

Thank you for your purchase. We look forward to assisting you again in the near future!



[View and Print
Receipt](#)



[Download
Order Detail](#)



[View Order History](#)



[New Workflow](#)



[Go to PDB
Reports](#)



[Appointments &
Terminations Home](#)

There are no additional forms that you need to fill out.

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From this page, the following options are available:

- **View and Print Receipt:** Select this option to view a receipt of the order you've just completed, as well as if you wish to print a physical or PDF copy.
- **Download Order Detail:** Select this option to download a CSV copy of your receipt.
- **View Order History:** Select this option to view your entire order history for the Appointments and Terminations application.
- **New Workflow:** Select this option to return directly to the Select Company and Product page to start a new workflow.
- **Go to PDB Reports:** Select this option to leave Appointments and Terminations for the PDB Reports application.
- **Appointments and Terminations Home:** Select this option to return to the Appointments and Terminations home page.

Otherwise, you may close your browser window if you are finished with your Appointments and Terminations work.

Receipt

This option is used to generate a PDF copy of the selected order receipt. This PDF can be opened or saved as desired.



Receipt for Order Number: 96351
Date: 09/18/2017
Payment type(s): Credit Card

State Fee Total	\$100.00
Transaction	\$6.00
Grand Total	\$106.00

Item Description	State	NIPR Trans	Fee Description	Fee	Totals
214333 Appointment GREEN, FOREST R Appointment in KY	KY	437240280	Transaction Fee State Fee	\$3.00 \$50.00	\$53.00
214343 Appointment GREEN, FOREST R Appointment in KY	KY	437240281	Transaction Fee State Fee	\$3.00 \$50.00	\$53.00
Item	2			Grand Total	\$106.00

This charge will appear on your account statement as "NIPR Licensing Services, Kansas City, MO."

Thank you for using NIPR.com.

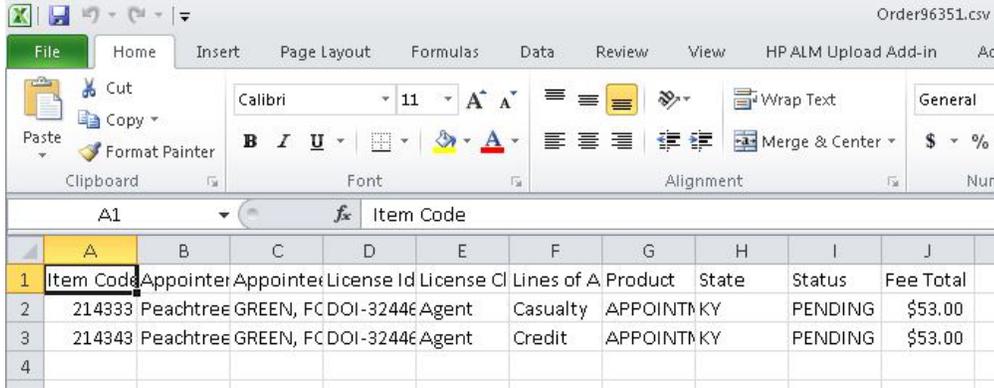
This option is available at any time by clicking on "Order History" from the Home page, and then clicking on the "Receipt" link for the order you wish to view.

It is also available from the Thank You page that is displayed whenever you complete an order payment.

Order Detail

This option is used to download and view a CSV copy of an order. You will be prompted to select whether to open the file (and with what software application to open it with), or to save the file (and the location you wish to save it to).

The following is a screenshot of an example order detail file opened using Microsoft Excel:



Item Code	Appointer	Appointer	License Id	License Cl	Lines of A	Product	State	Status	Fee Total
214333	Peachtree GREEN, FC DOI-3244	Agent			Casualty	APPOINTM	KY	PENDING	\$53.00
214343	Peachtree GREEN, FC DOI-3244	Agent			Credit	APPOINTM	KY	PENDING	\$53.00

You can view an order detail file at any time by clicking on "Order History" from the Home page, and then clicking on the "Order Detail" link for the order you wish to view.

It is also available from the Thank You page that is displayed whenever you complete an order payment.

Order History

This page allows you to view your order history, as well as to generate PDF or CSV copies of your orders using the "Receipt" or "Order Detail" links, respectively.



Order History



[New Workflow](#)



[Cart](#)



View	Order Number ↕	Order Date ▼	Quantity	Total
Order Detail Receipt	96351	09/18/2017	2	\$106.00

Total row count: 1

In addition, users with large order histories can sort their history information by Order Number or Order Date.