

Telecommunications Manual

CHAPTER VI - PRODUCER MATRIX SYSTEM

**A. GENERAL INFORMATION**

CAR's Producer Matrix file is comprised of summary and detail records relative to Representative Producers, Exclusive Representative Producers, and voluntary agents writing automobile insurance in Massachusetts. Companies designate a code (known as the Producer Code) to denote a specific agent/broker or to denote business the company wrote directly.

Both the cession record and the statistical records collect the producer code. CAR uses the Producer Matrix File to verify that the information companies report is valid and accurate. Thus, CAR's cession and statistical systems compare the producer code and CAR ID Code fields to the Producer Matrix File. Those cession and statistical records that do not match are flagged in error. CAR also uses the Producer Matrix File in the determination of automatic backdates for cession coverage.

Companies are responsible for informing CAR of any changes affecting an agency, such as new appointments, terminations, address, or code changes to the Producer Matrix File. CAR guarantees that it will complete the changes to the Producer Matrix File within 10 working days of receiving an accurate update form. If any company would like a hard copy printout of the file, please contact your company's Data Analyst.

This chapter details the procedures to access the producer code database as its own function; however, you can also access this database via the statistical correction system and the cession correction system.

Commonwealth Automobile Reinsurers

Telecommunications Manual

CHAPTER VI - PRODUCER MATRIX SYSTEM

**B. PRODUCER CODE INQUIRY**

1. Access

To access CAR's Producer Matrix File from TE100 -TELECOMMUNICATIONS MENU (exhibit VI-B-1):

- a. **Select PF5 or**
- b. **Tab to the option field, type "05" and hit ENTER**

Exhibit VI-B-1

TE100SB	COMMONWEALTH AUTOMOBILE REINSURERS	11/01/2006
TEMENUSA	TELECOMMUNICATIONS	11:15:30
C.A.R. ACCOUNTING	..... PF2	OR 02
SESSION SYSTEM	..... PF3	OR 03
STATISTICAL SYSTEM	..... PF4	OR 04
<b>PRODUCER CODE SYSTEM</b>	<b>..... PF5</b>	<b>OR 05</b>
TAXI INDEX SYSTEM	..... PF6	OR 06
AUDIT & CLAIMS SYSTEM	..... PF7	OR 07
EXPERIENCE RATING SYSTEM	..... PF8	OR 08
TERMINATE C.A.R. SESSION	..... PF12	OR 12
	: :	
DEPRESS PFKEY OR ENTER PROCESSING OPTION		

The PM600 - COMPANY PRODUCER INQUIRY screen appears (exhibit VI-B-2).

Commonwealth Automobile Reinsurers

Telecommunications Manual

CHAPTER VI - PRODUCER MATRIX SYSTEM

**B. PRODUCER CODE INQUIRY (CONTINUED)**

1. Access (continued)

Exhibit VI-B-2

```
PM600MN          COMMONWEALTH AUTOMOBILE REINSURERS          11/01/2006
PM600SA          PRODUCER INQUIRY SYSTEM                    11:15:30

                COMPANY                999

                EFFECTIVE YEAR          _____

Option 1:  PRODUCER CODE                _____
OR
Option 2:  AGENCY NAME                   _____

MEMBER COMPANIES, FILL IN THE KEY AND DEPRESS...PF2 OR 02
DIVISION OF INSURANCE ACCESS.....PF3 OR 03
RETURN TO MENU.....PF12 OR 12

                :  _  :
```

To view information for a specific producer:

- a. **Input your company code if the field is blank**
- b. **Input the effective year**
- c. **Input the specific producer code you want to review**
- d. **Hit ENTER**

The PM610SA - COMPANY PRODUCER INQUIRY screen appears (exhibit VI-B-3).

Commonwealth Automobile Reinsurers

Telecommunications Manual

CHAPTER VI - PRODUCER MATRIX SYSTEM

**B. PRODUCER CODE INQUIRY (CONTINUED)**

1. Access (continued)

Exhibit VI-B-3

```
PM610SA                COMMONWEALTH AUTOMOBILE REINSURERS                11/01/2006
                        COMPANY PRODUCER INQUIRY                        11:15:30

AGENCY NUMBER          00765
AGENCY NAME            ANY INSURANCE AGENCY

   CO      CAR  ASSIGN  CONTRACT  PROD  NEW BUS  RENEWAL  EFF
   CODE  LOB  ID  YY/MM/DD  YY/MM/DD  CODE  YY/MM/DD  YY/MM/DD  YEAR
-  999  COM  4  00/00/00  00/00/00  061092
-  999  COM  4  00/00/00  00/00/00  061092
-  999  COM  4  00/00/00  00/00/00  061092
-  999  COM  0  00/00/00  00/00/00  061092
-  999  COM  4  00/00/00  00/00/00  061092
-  999  COM  0  00/00/00  00/00/00  061092  04/03/01  04/12/01  2004
-  999  COM  4  00/00/00  00/00/00  061092  04/03/01  04/12/01  2004

ENTER 'X' BESIDE SELECTION - THEN DEPRESS PFKEY OR ENTER PROCESSING OPTION
                               :
                               :

PF3/03 - DETAIL INQUIRY      PF7/07 - PAGE BACKWARD      PF8/08 - PAGE FORWARD
PF12/12- RETURN TO MENU
```

If you entered a producer code not contained in CAR's database, then the system returns the message: "PRODUCER RECORD NOT FOUND" (exhibit VI-B-4).

Commonwealth Automobile Reinsurers

Telecommunications Manual

CHAPTER VI - PRODUCER MATRIX SYSTEM

**B. PRODUCER CODE INQUIRY (CONTINUED)**

1. Access (continued)

Exhibit VI-B-4

```
PM600MN          COMMONWEALTH AUTOMOBILE REINSURERS      11/01/2006
PM600SA          PRODUCER INQUIRY SYSTEM                  11:15:30

                COMPANY CODE          999
                EFFECTIVE YEAR        2006
OPTION 1:  PRODUCER CODE      Y65743
OR
OPTION 2:  AGENCY NAME _____

MEMBER COMPANIES, FILL IN KEY AND DEPRESS.... PF2 OR 02
DIVISION OF INSURANCE ACCESS..... PF3 OR 03
RETURN TO MENU..... PF12 OR 12

                : _ :
                PRODUCER RECORD NOT FOUND
```

In the event you entered an invalid producer code:

- a. **Re-key a valid producer code**
- b. **Hit ENTER**

2. Listing of Producer Codes

The PM610SA - COMPANY PRODUCER INQUIRY lists just the information for your company even though one agency may have contracts with other companies. The key for each record is comprised of -

- Company Number
- Producer Code
- Effective Year
- CAR ID CODE

The records are sorted and presented in this order. As a result, one producer code may have multiple corresponding records.

Telecommunications Manual

CHAPTER VI - PRODUCER MATRIX SYSTEM

**B. PRODUCER CODE INQUIRY (CONTINUED)**

2. Listing of Producer Codes (continued)

The chart below shows a description of the remaining fields.

<b>FIELD</b>	<b>DESCRIPTION</b>
ASSIGN DATE	Indicates date CAR assigned a producer to a Servicing Carrier.
CONTRACT DATE	Indicates date company actually contracted with producer.
NEW BUS TERM	Indicates termination date for new business policies (TX1 cessions) from the broker.
RENEWAL TERM	Indicates termination date for renewal policies (TX2 cessions).
LOB	Line of business the agent writes: COM = Commercial; PPO = Personal; ALL = Both

To access additional information unique to a specific record,

- a. **Tab to the line you wish to view**
- b. **Type an "X"**
- c. **Select PF3 or tab to the option field, type "03" and hit ENTER**

The PM610SB - COMPANY PRODUCER INQUIRY screen appears (exhibit VI-B-4).

Commonwealth Automobile Reinsurers

Telecommunications Manual

CHAPTER VI - PRODUCER MATRIX SYSTEM

**B. PRODUCER CODE INQUIRY (CONTINUED)**

2. Listing of Producer Codes (continued)

Exhibit VI-B-4

```
PM610SB                COMMONWEALTH AUTOMOBILE REINSURERS                11/01/2006
                        COMPANY PRODUCER INQUIRY                        11:15:30

AGENCY NUMBER          00765
AGENCY NAME            ANY INSURANCE AGENCY
COMPANY CODE           999                                CAR ID CODE           4
PRODUCER CODE          061092                            YEAR (YYYY)          2006
ASSIGN DATE (YYYYMMDD) 00000000
CONTRACT DT (YYYYMMDD) 20000101
NEW BUS TERM (YYYYMMDD)                                RENEWAL TERM (YYYYMMDD)

LINE OF BUSINESS      000          L.O.B      PPO      NNNNNNNNNNNN
LOB EFF MONTH         00          ELIG      COM      YYYYYYYYYYYY
                        PPO--COM      JFMAMJJASOND
BACKDATE OPTIONS      0  0          BACKDATE  PPO      00000000000000
BACKDATE MONTH        00          OPTIONS   COM      00000000000000
VOLUNTARY SWITCH      1
SYSTEM ADD DATE YYYYMMDD) 1997/01/01 TRANSACTION DATE (YYYYMMDD) 1997/06/01

                        DEPRESS PFKEY OR ENTER PROCESSING OPTION
                        : _ :

PF3/03 - AGENCY DETAIL                                PF12/12 - RETURN TO MENU
```

3. Detail Producer Code Information

Below you will find descriptions of the fields contained in the PM610SB - Detail Producer Code screen.

L.O.B. ELIG: the fields to the right represent the type of business and the effective months the agent may write. A value of "Y" indicates yes, and a value of "N" indicates no.

*For example: If an agent may write only commercial business, "Y"s will appear in the commercial line (as in Exhibit VI-B-6) only. Furthermore, if an agent was terminated mid-May, then the months of June through September will reflect "N"s.*

Telecommunications Manual

CHAPTER VI - PRODUCER MATRIX SYSTEM

**B. PRODUCER CODE INQUIRY (CONTINUED)**

3. Detail Producer Code Information (continued)

BACKDATE OPTIONS: the fields to the right represent the type of business and effective months eligible for session backdating.

0 = no automatic backdating

2 = new backdating

Note that backdate options can differ by line of business (i.e. PPO could be set for new business only, while COM is set for no autobackdating).

TRANSACTION DATE: Represents the date CAR last made an update to the producer code record

To access the agency detail information:

- a. **Select PF3 or**
- b. **Tab to the option field, type "03", and hit ENTER**

The PM620SA - COMPANY PRODUCER INQUIRY screen appears (exhibit VI-B-7).



Commonwealth Automobile Reinsurers

Telecommunications Manual

CHAPTER VI - PRODUCER MATRIX SYSTEM

**B. PRODUCER CODE INQUIRY (CONTINUED)**

3. Detail Producer Code Information (continued)

Exhibit VI-B-7

```
PM620PR          COMMONWEALTH AUTOMOBILE REINSURERS          11/01/2006
PM730SA          PRODUCER INQUIRY SYSTEM                    11:15:30

AGENCY NUMBER 00562   FILE EST 1995 / 04 / 28   FL TERM   /   /
                YYYY / MM / DD                YYYY / MM / DD

  AGENCY NAME ANY INSURANCE AGENCY
PRINCIPAL NAME INSURED
  STREET      999 MAIN STREET
P.O. ADDRESS
  TOWN        DORCHESTER          STATE      MA          ZIP      99999
TELEPHONE #  999 - 999 - 9999     FAX #     999 - 999 - 9999
TOWN CODE    819      TERR 21    # ACTIVE SC'S 1
AS OF 2006 / 07 # PP EXPS      488   AS OF 2006 / 07   COMM WP      $9,031
AFFIL AGCY
PPO ERP CO   ANY INSURANCE COMPANY
COM ERP CO   ANY INSURANCE COMPANY
=====

PF12/12 - RETURN TO MENU
—
```

4. Agency Information

The PM620SA - COMPANY PRODUCER INQUIRY (exhibit VI-B-7) displays general and specific information relative to the agency,

- Agency Name
- Principle Owner
- Address
- Telephone Number
- # PP EXPS - the total number of private passenger exposures (for all companies) the agency wrote.
- # ACTIVE SC'S - the agency's total number of active Servicing Carriers.
- AFFIL AGCY - any affiliated agencies.