

## **Producer Licensing Bureau Company Appointment Data Extract Information**

### **Supplied Data**

The California Department of Insurance will not supply data such as phone numbers, social security numbers, residence addresses or e-mail addresses. This information is classified as sensitive data and is not furnished on these listings. Information on these lists will include zip codes, city and state in addition to the individual/agency/qualification information requested. The entire listing must be ordered for each qualification selected since the department is unable to supply these lists in part or extract a certain volume of data from these lists. It is the Requester's responsibility to extract, sort and format this information for the data's intended use. These extracts/sorts will not be performed by the CDI. A record layout will be e-mailed with each list for your review. Please review all record layouts that are furnished for each listing. The data that is contained on these lists is identified by the record layout. This is the only data that will be appearing on each listing. If the record layout does not reflect the data, the listing will not contain it.

### **Data Format/System Requirements**

The data will be supplied via a zipped e-mail file, and the format for all listings is an ASCII flat text file. Data will be supplied on a CD-Rom as a special request only. There is no program associated with the file and it will not be formatted for the Requester's requirements. It is the Requester's responsibility to format the data for compatibility with their database.

It is the responsibility of the Requester to meet the minimum system requirements to import the data into their database. Some of these listings are very large and require a significant amount of hard disk space. To avoid system problems, it is strongly recommended that the Requester verify the available disk space on their system before importing the data. The CDI cannot furnish technical support for non-departmental computer systems. Responsibility for technical support on the Requester's computer system lies solely with the Requester.

### **Order Forms/Payment Process**

The order form must be completed and sent to the contact listed on the bottom of the order form. The payment process is also listed on the bottom of the order form. The CDI does not bill for this service and does not accept credit cards. A check must be included with the completed order form in the amount of the entire order with the applicable sales tax included. All checks must be made payable to the California Department of Insurance. Failure to comply with the payment requirements will delay the delivery process.

### **Order Form Coding**

Each list will require the following information, NAIC number, and Company Name and License type code. The most common requested codes are:

**LX** = Life, Accident and Health Agent

**PR/CA** = Property & Casualty Broker-Agent

**INDV APPT** = Individual appointments only

**AGY APPT** = Agency appointments only

**INDV APPT/TERM** = Individual appointments with terminations

**AGY APPT/TERM** = Agency appointments with terminations

**ALL** = All agencies and individuals.

### **Pricing/List Generation**

Appointment prices are set by the CDI and are subject to change. A count for each appointment listing will be furnished upon request. The total volume for these lists may range from 1 to 15,000 names.

Currently the price for these lists are \$330 per NAIC number (CA residents must add sales tax.). Each appointment list is as current as the date and time the appointment list is produced. These are queried files and are updated daily.

### **Delivery Process**

Data will be e-mailed to the e-mail address supplied on the order form only after the payment process has been satisfied. This process may take between two to three weeks. Express delivery may be used for the CD-Rom, and it is required that a prepaid return express delivery label be provided. Requester's are responsible for expenses that are incurred by the express delivery process.

**Note:** Currently our technical staff and our programming staff support this process and have priority assignments. At times this may prevent a prompt response to these inquiries, but are unavoidable. We apologize in advance for any inconvenience this may cause.

**For further listing information, email your inquiry to the Producer Mailing List Technician at [listings@insurance.ca.gov](mailto:listings@insurance.ca.gov) or leave a message on the voice mail box at (916) 492-3063 at the California Department of Insurance Producer Licensing Bureau.**