

Oracle Insurance Insight

**Oracle Insurance Insight
User Guide**

version 7.0

Part number: E22075-01

December 2010

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Preface

Welcome to the *OII User Guide Version 7.0*. This manual provides detailed instructions for using Oracle Insight 7.0 to access information. Using the step-by-step instructions and examples pictured for each task, this book will demonstrate the capability to generate, view, distribute, store, and retrieve reports electronically.

VERSION

This manual corresponds to Oracle Insurance Insight (OII) version 7.0.

INTENDED AUDIENCE

This manual is intended for users with advanced knowledge of the insurance industry. OII leverages Oracle Business Intelligence Enterprise Edition (OBIEE) as its front end interface. It is strongly recommended that users have familiarity with this application in order to use OII to its fullest potential.

RELATED DOCUMENTS

For more information, refer to the following documents:

- *Oracle Insurance Insight Release Notes*
- *Oracle Insurance Insight Installation Guide*
- *Oracle Insurance Insight Warehouse Palette User Guide*
- *Oracle Insurance Insight Implementation Guide*
- *Oracle Insurance Insight Administration Guide*

OII DOCUMENTATION ON THE ORACLE TECHNOLOGY NETWORK (OTN)

The OII documentation set is packaged with the product release. You can also obtain these guides online through the Oracle Technology Network (OTN) at this address:

<http://www.oracle.com/technology/documentation/insurance.html>

RELEVANT ORACLE DOCUMENTATION

This manual describes how to perform tasks in OBIEE using OII components. As such, it is not a complete user guide for OBIEE. For complete documentation on OBIEE Intelligence Server, please go to the documentation section of the Oracle website to consult the following manual:

Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4.

The entire documentation set for the Oracle Business Intelligence Suite Enterprise Edition can be found on the Oracle Documentation page on the Oracle Technology Network at:

<http://www.oracle.com/technology/documentation/index.html>

CONTENTS OF THIS GUIDE

This manual contains the following chapters and appendices:

Chapter 1: Introduction to Oracle Insurance Insight - This chapter briefly describes the function of the OII application.

Chapter 2: Accessing OII - This chapter describes how to log into OII.

Chapter 3: Navigating OII - This chapter describes how to use the buttons and links on the OII GUI to move about the application.

Chapter 4: Scorecard Dashboard - This chapter describes how to setup and run the Scorecard dashboard reports.

Chapter 5: Analysis Dashboard - This chapter describes how to setup and run the Analysis dashboard reports.

Chapter 6: Reports Dashboard - This chapter describes how to setup and run the reports on the Reports dashboard.

Chapter 7: Answers - This chapter describes how to build queries, or requests, on the Answers page using the filters and metrics delivered with the OII.

Appendix A: OII Filters - This appendix lists the filters for each OII mart.

Appendix B: OII Metrics - This appendix lists the OII metrics and their definitions.

Appendix C: Glossary - A glossary of OII terms.

CUSTOMER SUPPORT

If you need assistance with OII, please log a Service Request using My Oracle Support at <https://support.oracle.com>.

Address any additional inquiries to:

Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Worldwide Inquiries:
Phone: +1.650.506.7000
Fax: +1.650.506.7200
oracle.com

Chapter 1

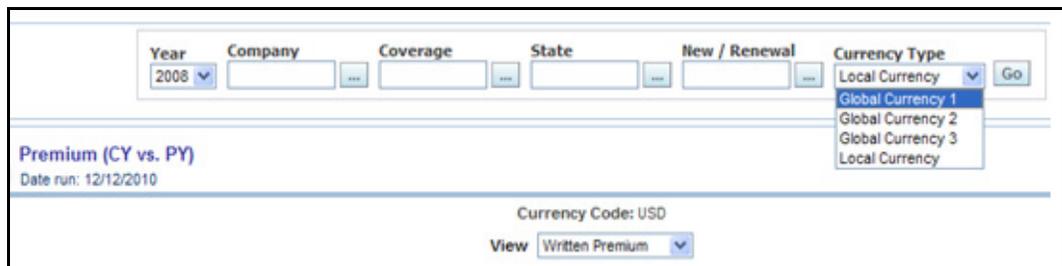
Introduction to Oracle Insurance Insight

Oracle Insurance Insight (OII) is a comprehensive business intelligence system created exclusively for the Property and Casualty (P&C) insurance industry. OII provides a complete set of Web-based analytical and reporting components that enable users to generate, view, distribute, electronically store and retrieve critical reports. OII provides the following capabilities:

- Consolidates data from multiple, disparate source systems to provide a strategic enterprise-wide view across operating units.
- Provides an underlying data model constructed specifically for the P&C insurance industry.
- Delivers information management, reporting and advanced analytics to end-users through an easy-to-use Web application.
- Accommodates all P&C lines of business and all states/provinces in the U.S. and Canada.

WHAT'S NEW IN OII 7.0?

Multi-Currency Support - OII now supports multiple currencies in release v7.0. In certain Dashboard and OII Reports users can select a currency as part of the report input. The available choices will consist of one **local currency** (i.e. USD) and up to three **global currencies** (i.e. Euro). Only one currency can be selected for a report at one time.



The screenshot displays a web-based report input form. At the top, there are several input fields: 'Year' (set to 2008), 'Company', 'Coverage', 'State', and 'New / Renewal'. To the right of these fields is a 'Currency Type' dropdown menu, which is currently open, showing four options: 'Local Currency', 'Global Currency 1', 'Global Currency 2', and 'Global Currency 3'. Below the input fields, the report title 'Premium (CY vs. PY)' is visible, along with the date 'Date run: 12/12/2010'. At the bottom of the form, the 'Currency Code' is set to 'USD', and there is a 'View' dropdown menu currently set to 'Written Premium'.

Figure 1: Users can Select Currency Type as a Report Input

All currencies must be configured during the OII data load process. Once configured, these currencies cannot be changed again to avoid inconsistencies in data generation.

New Subject Areas in Answers - The following new Subject Areas are available in the Answers tool:

- Corporate Detail (Policy and Claim Monthly Snapshot for all lines of business)
- Claim Monthly Snapshot (all lines of business)
- Claim Transaction (all lines of business)
- Policy Transaction (all lines of business)
- Commercial Auto (Policy & Claim Monthly Snapshot)
- Commercial Property (Policy & Claim Monthly Snapshot)
- Dwelling Fire (Policy & Claim Monthly Snapshot)
- Homeowners (Policy & Claim Monthly Snapshot)
- Personal Auto (Policy & Claim Monthly Snapshot)
- Personal Umbrella (Policy & Claim Monthly Snapshot)

OII INTERFACE

OII uses Oracle Business Intelligence Enterprise Edition (OBIEE) 10.1.3.4 for its front end interface. OBIEE offers an easy-to-follow, point-and-click interface using built-in insurance metrics, common industry terms, quantitative measurements and industry-standard naming conventions.

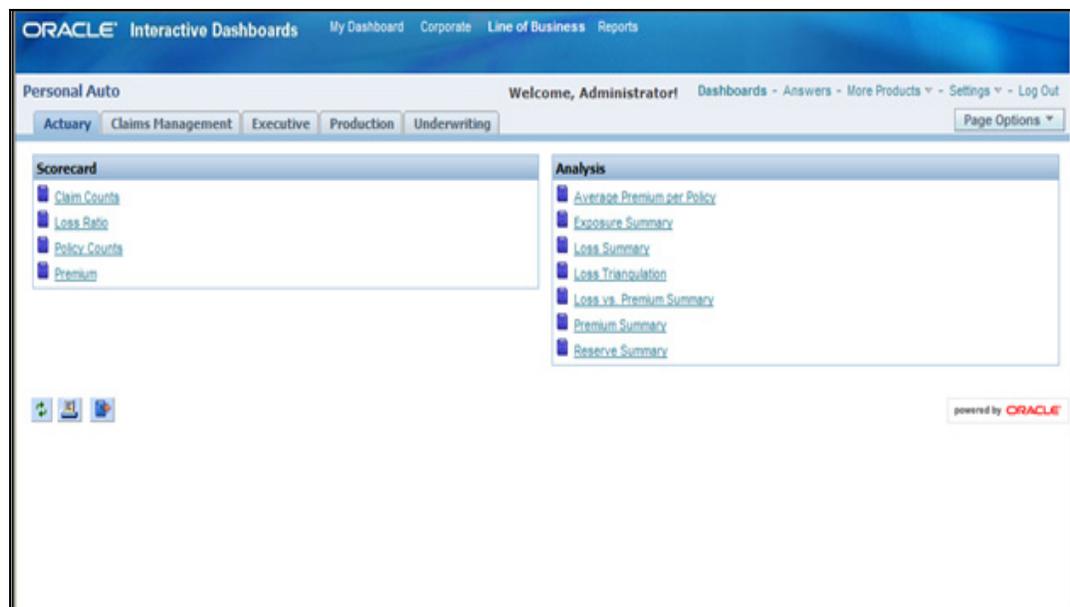


Figure 2: OII Landing Page

The OII interface is comprised of four main application components.

- Scorecard dashboard
- Analysis dashboard

- Reports dashboard
- Answers tool

SCORECARD AND ANALYSIS DASHBOARDS

The Scorecard and Analysis dashboards contain a set of reports that allow users to select, analyze, and view mart-specific data.

Scorecard

The Scorecard dashboard features four separate reports which show changes for a specific previous and prior year time period for the following high-level metrics:

- Claim Counts
- Loss Rate
- Policy Counts
- Premium

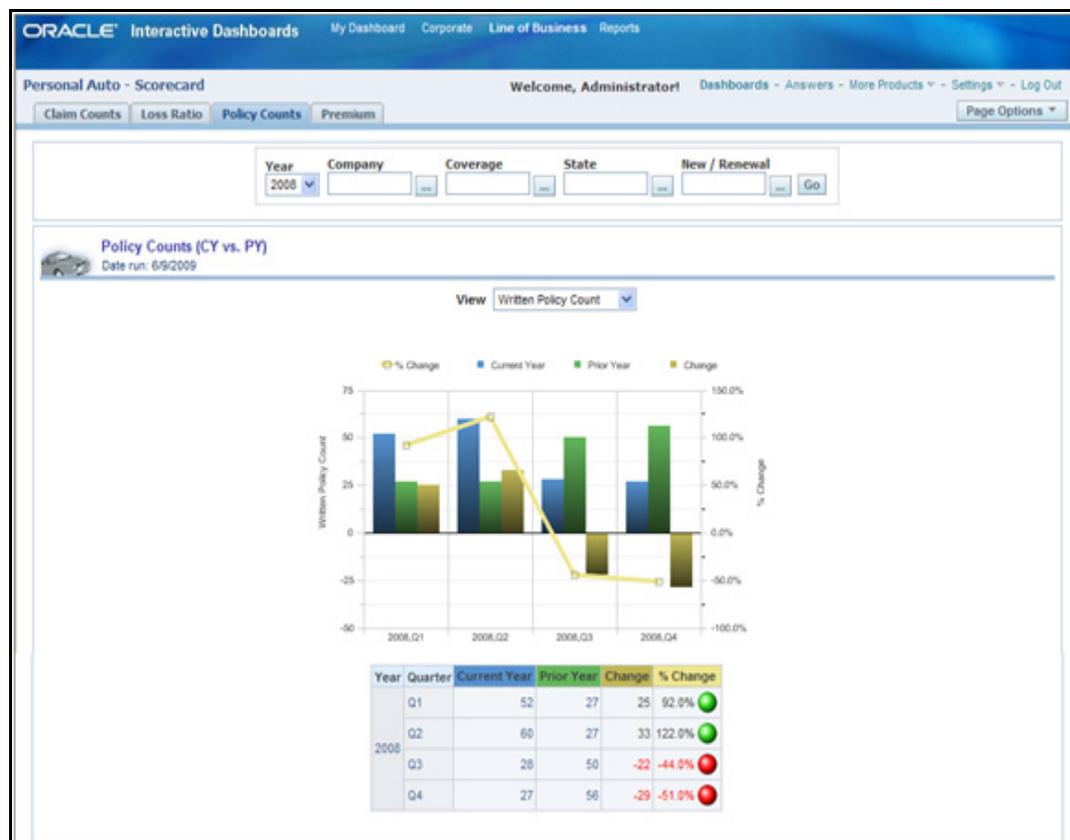


Figure 3: Scorecard - Policy Counts Analysis

Analysis

The Analysis dashboard contains a set of high-level insurance analyses. The reports that are available on this dashboard are determined by the role(s) assigned to the user (Actuary, Claims Management, Executive, Production, and Underwriting) as well as the selected mart category (Corporate or Line of Business).

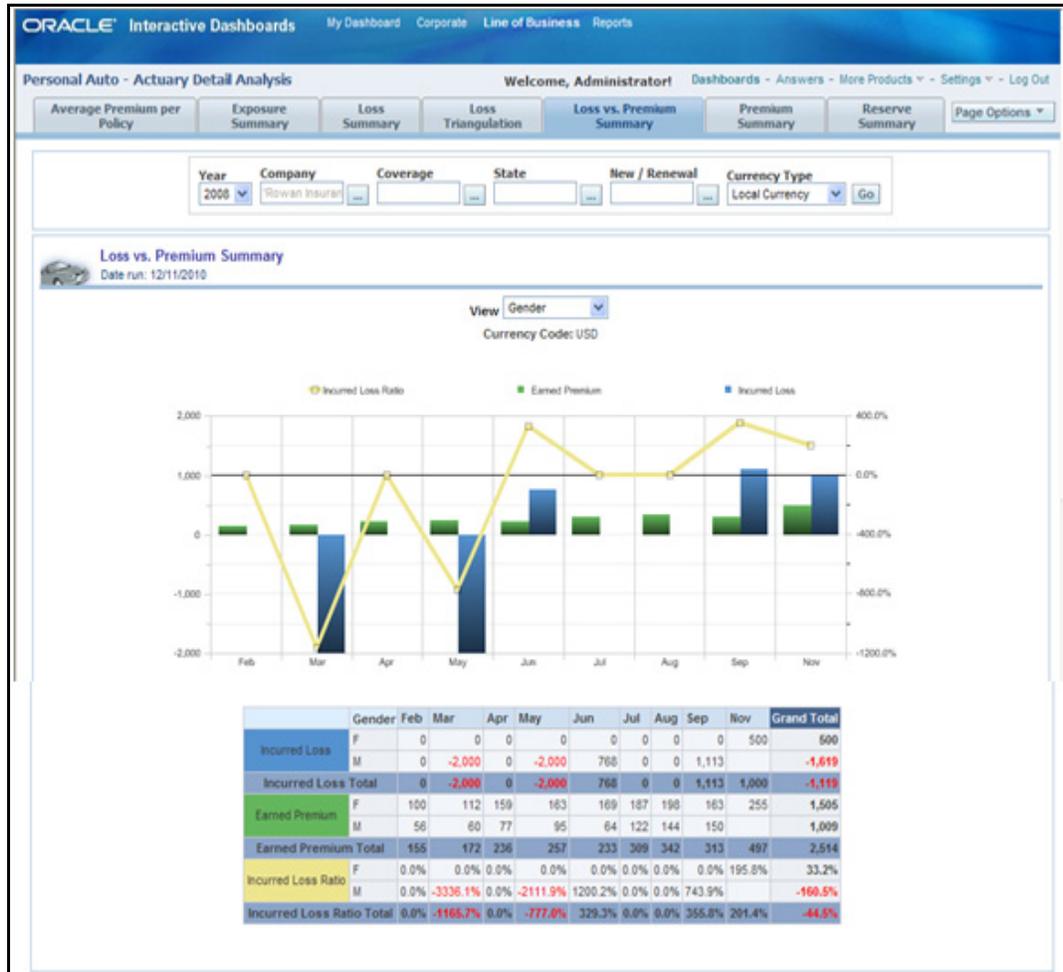


Figure 4: Analysis – Loss vs. Premium Summary Analysis

The Scorecard Dashboard and Analysis Dashboard reports share the following features:

- Users select a time period and filters for the report.
- Filters are unique to a selected mart category (Corporate or Line of Business). The filters represent elements by which the metrics can be analyzed, such as by line of business, agency, program, adjuster, class code and postal code.
- Results are displayed in table and chart format.
- Reports allow users to drill down on certain areas in a table and/or chart to view data by time periods or geographical area (i.e. state, city, etc.).

REPORTS DASHBOARD

OII includes a collection of standard reports that provide a “snapshot” of premium and loss data as of the end of a particular month. The static data is organized between summary-level reports that provide top-level analyses across all lines of business and reports that provide analyses specific to separate lines of business.

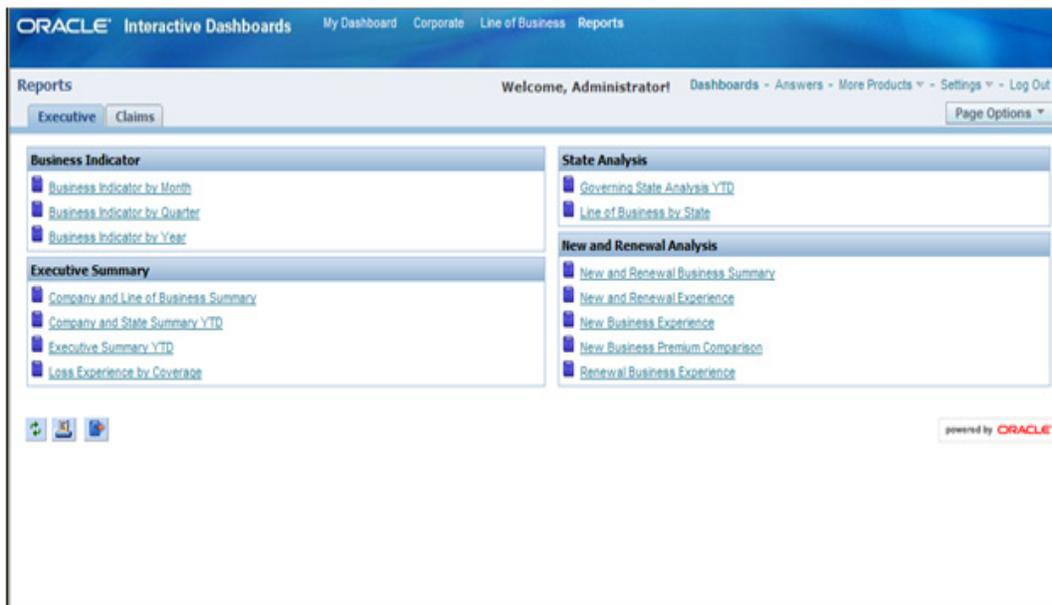


Figure 5: Reports Dashboard

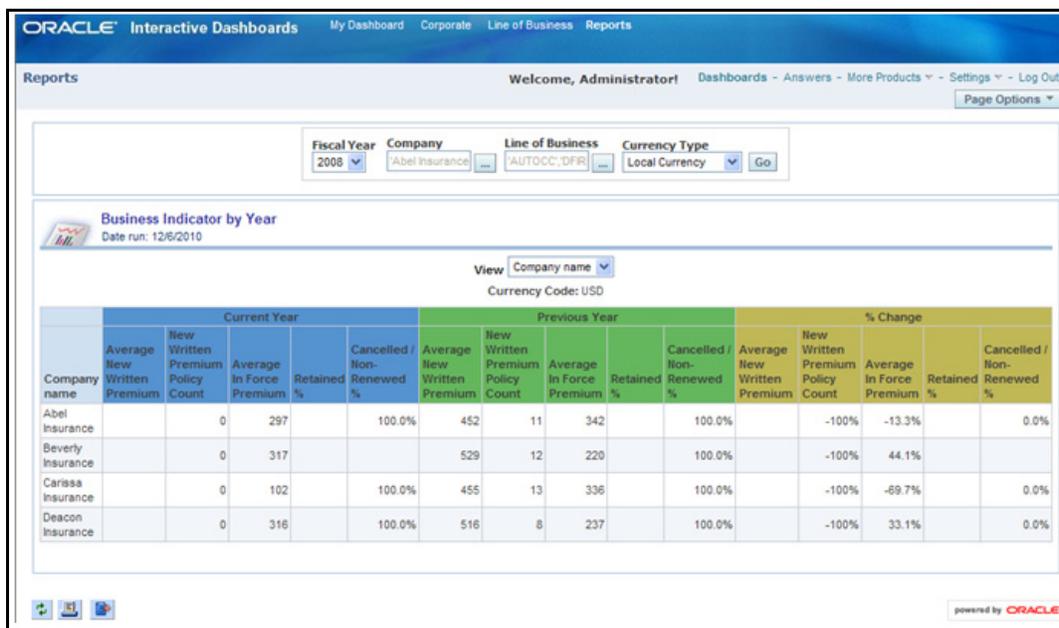


Figure 6: Sample Business Indicator by Year Report

ANSWERS

OBIEE Answers is an ad-hoc query tool that allows users to build queries and reports, also called requests, using data elements from OII. When setting-up requests in Answers, a user selects two types of data components:

- **Metrics** – Represent calculated values, including premiums, losses, exposures, ratios, averages and counts.
- **Filters** – Represent elements by which the metrics can be analyzed, such as by line of business, agency, program, adjuster, class code and postal code. Filters are organized in a Who, What, When, Where format to facilitate ease of navigation.

The metrics and filters are organized by mart category. Each mart is a set of "query ready" tables designed to support specific analytical requirements. Marts contain fact (metric) and dimension (filter) tables and are segmented by line of business.

Using a mart's metrics and filters as building blocks, users can design their own requests and use the Answer's formatting features to customize the look and feel of the results. Results can appear in various styles such as charts, pivot tables, and reports. The results can be saved for personal reference or shared with others to be integrated into any OII home page or dashboard.

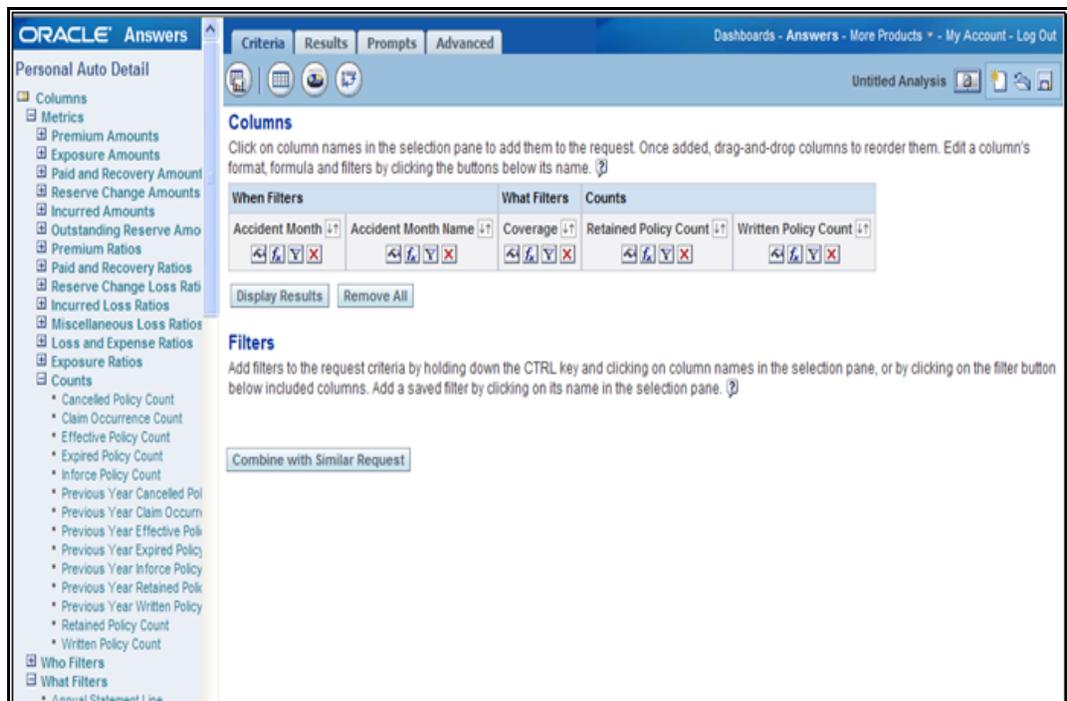


Figure 7: Answers Interface for Personal Auto

Chapter 2

Accessing OII

To access OII, your system administrator needs to supply you with the URL where the application resides, a User Name, and a Password.

1. Open a new browser window and enter the following URL:

```
http://<hostname>:<port>/analytics
```

Note In the above URL, <hostname> can be the server name or IP address where you installed OBIEE (i.e., <http://<hostname>:7001/analytics>)

2. A login screen similar to this one will appear.



The screenshot shows the Oracle Business Intelligence login interface. At the top, there is a banner with the Oracle Business Intelligence logo and a header image featuring a globe and several people. Below the header, the text reads: "Please enter your User ID and Password below, and then press the Log In button." The login form consists of two input fields: "User ID" and "Password", followed by a "Log In" button. Below the form is a "Select a Language" dropdown menu currently set to "English". At the bottom of the page, the version number "Oracle Business Intelligence 10.1.3.4.1" and a copyright notice are displayed.

Figure 8: Oracle Business Intelligence Login Screen

3. Type in your User ID and Password.

4. Click the **Log In** button.

The OII landing page, similar to the one on the following page, appears.

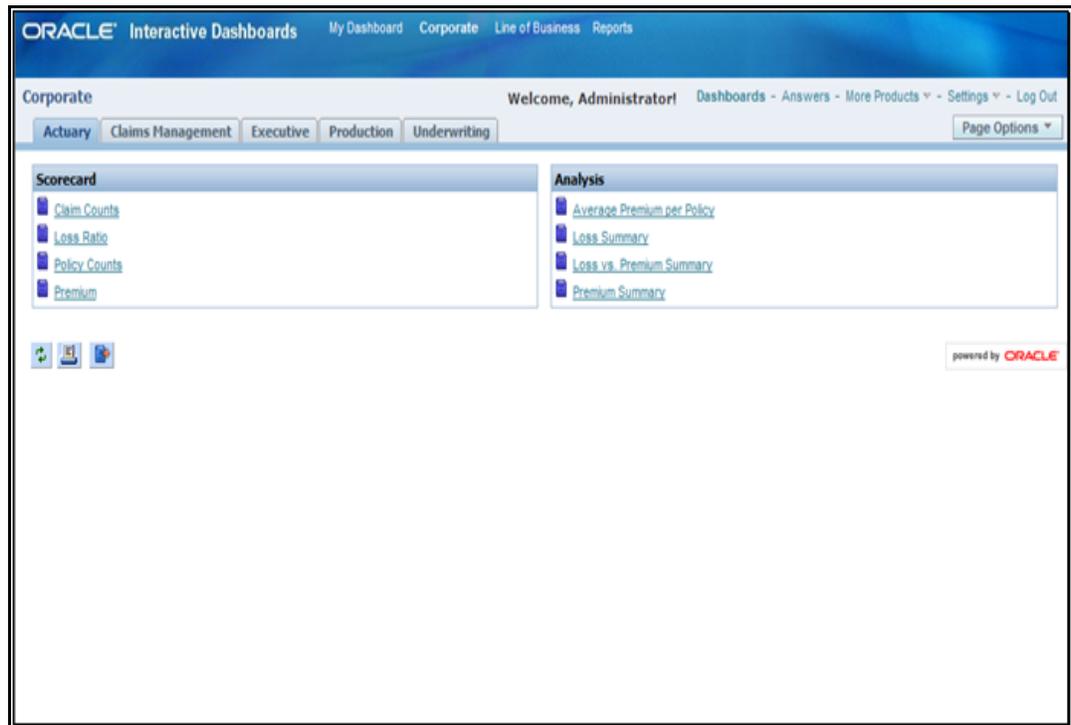


Figure 9: OII Landing Page

Note The exact number of tabs that you will see on this page depends upon the role(s) that were assigned to you by the system administrator.

OII roles are discussed in *OII User Roles and Analysis Dashboard Reports* on page 13.

Chapter 3

Navigating OII

This chapter will familiarize you with the layout of the OBIEE interface as it applies to OII.

USING THE OII DASHBOARD LINKS

When you first access OII you will notice two lines of links on the landing page. The first set of links are centered at the top of the page. The second line of links are below and to the right of the “Welcome, {User}!” label. The exact links that are available when you log in are determined by your privilege and security settings. The figure below shows the links available for a user with full administrator privilege. Users without administrator privileges will not see all of the links in this figure.

Some of these links are standard links for OBIEE. The other links are those that are specific to OII. A brief description of each type of link appears on the following pages.

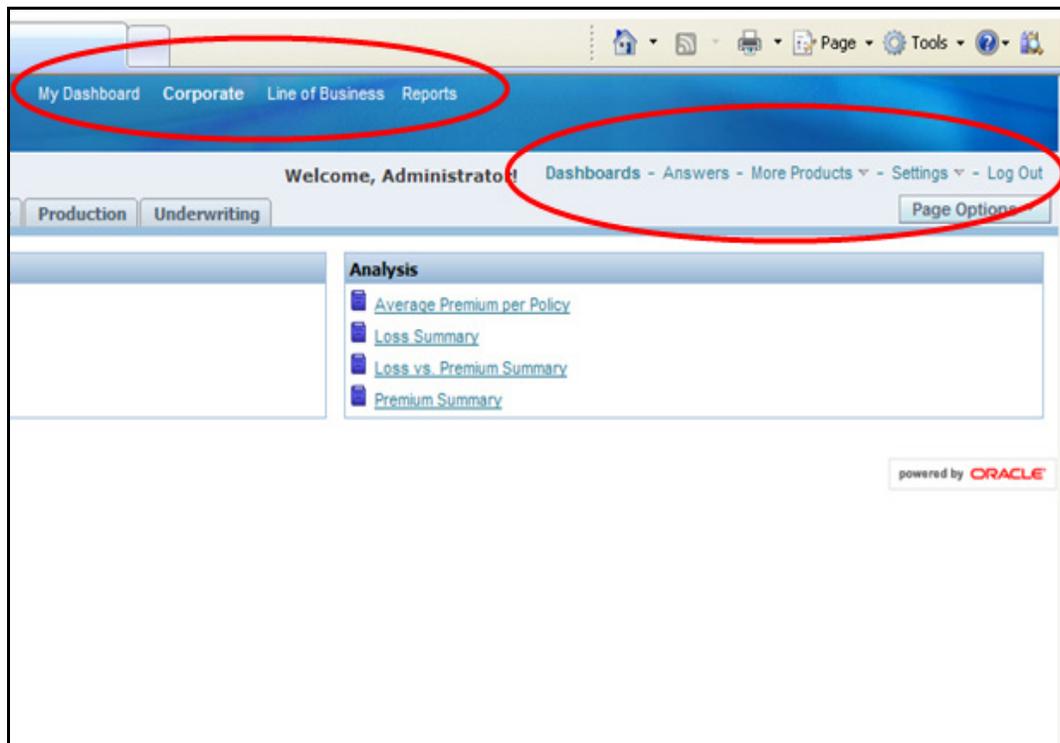


Figure 10: Active Links on the OII Landing Page

OII LINKS



Figure 11: OII Links

Table 1: OII Links

Link	Description
Corporate	<p>This link selects the Corporate mart as the active mart to use in all Scorecard and Analysis dashboard. When you are on the Scorecard or Analysis dashboard all available filters and metrics appearing in these dashboards will be specific to the Corporate mart.</p> <p>This is the default mart which is selected when you first log into OII. The name of the selected mart appears in the left hand side of whatever page you are on while in the Scorecard and Analysis Dashboards.</p> <p>See page 18 for a further explanation of Marts.</p>
Line of Business	<p>This link displays a drop-down list that allows you to select one of the six Lines of Business marts to use for reports on the Scorecard and Analysis dashboards:</p> <ul style="list-style-type: none"> • Commercial Auto • Commercial Property • Dwelling Fire • Homeowners • Personal Auto • Personal Umbrella <p>When you are in either the Scorecard or Analysis dashboard the available filters will be specific to the selected Line of Business. The name of the selected mart appears in the left hand side of whatever page you are on while in the Scorecard and Analysis Dashboards.</p> <p>See page 18 for a further explanation of Marts.</p>
Reports	<p>This link opens the Reports dashboard where you can run the suite of pre-configured OII reports.</p> <p>The OII reports are described in <i>Chapter 6: Reports Dashboard</i>.</p>

OBIEE LINKS



Figure 12: OBIEE Links

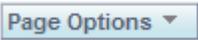
Table 2: OBIEE Links

Link	Description
My Dashboard	The My Dashboard link opens your personal dashboard. Personal dashboards are customized dashboards that hold reports and components relevant to the individual user. It is only available to users with administrator privileges or advanced security privileges. For a complete discussion of this feature, please refer to the <i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4</i> .
Dashboards	Accesses the Interactive Dashboard page, from which you can view the dashboards to which you have access.
Answers	This link opens Answers, OBIEE's query and report building tool. You can use the features in Answers to create your own customized reports from the OII data elements. The Answers tool is described in <i>Chapter 7: Answers</i> .
More Products	This link opens a drop-down list from which you can select other Oracle product in the Oracle Business Intelligence Enterprise Edition (OBIEE) application suite. The discussion of these products is beyond the scope of this manual. For more information, please consult the <i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4</i> .
Settings/My Account	The Settings link only appears to users with administrator privileges. If you do not have administrator privileges then you will only see the My Account link. When selected, the Settings link will display a drop-down list with two links: <i>Administration</i> and <i>My Account</i> . The Administration link accesses the OBIEE Presentation Services Administration page where you can perform various administrative functions such as managing users and groups. The My Account link opens the My Account page where you may view your general account information and set your preferences. The discussion of the functions under Settings and My Account are beyond the scope of this manual. Please refer to the following manuals for complete information: For OII: <ul style="list-style-type: none"> • <i>OII Administration Guide V7.0</i> For OBIEE: <ul style="list-style-type: none"> • <i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4</i>.
Log Out	Exits OII.

USING THE OII DASHBOARD BUTTONS

All pages in the Analysis, Scorecard, and Reports dashboards feature three buttons on the bottom left of the page as well as a Page Options button on the upper right.

Table 3: OII Dashboard Buttons

Buttons	Description
	<p>The Refresh button refreshes the information on the current dashboard page.</p>
	<p>The Print button allows you to print the current dashboard page in an HTML or PDF format.</p>
	<p>The Briefing Book button allows you to add the current dashboard page to a Briefing Book.</p> <p>The discussion of Briefing Books is beyond the scope of this manual. For a comprehensive description of Briefing Books, please refer to <i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4</i>.</p>
	<p>The Page Options button includes features for editing a dashboard and saving selections and appears only for users with administrative privileges.</p> <p>The discussion of these topics is beyond the scope of this manual. For a comprehensive description of editing a dashboard, please refer to <i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4</i>.</p>

OII USER ROLES AND ANALYSIS DASHBOARD REPORTS

The number and type of tabs that appear on the main OII landing page when you first log in is determined by the role(s) assigned to you as a user. There are five roles in OII:

- Actuary
- Claims Management
- Executive
- Production
- Underwriting

Users can be assigned to more than one role. Your role(s), along with the selected mart category (Corporate or Line of Business), also determines which reports you can access in the Analysis Dashboard. The Analysis Dashboard contains a set of specialized reports which are tailored to the specific insurance industry roles. The following sample screens show the Analysis Dashboards under each role for both a Corporate and Line of Business mart. The available reports are the same across all lines of business.

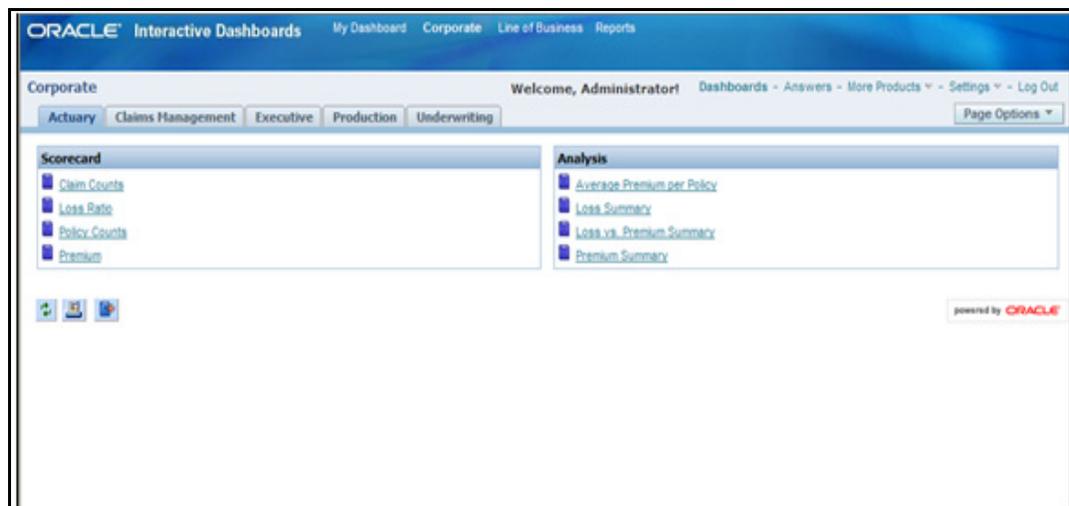


Figure 13: Actuary – Corporate

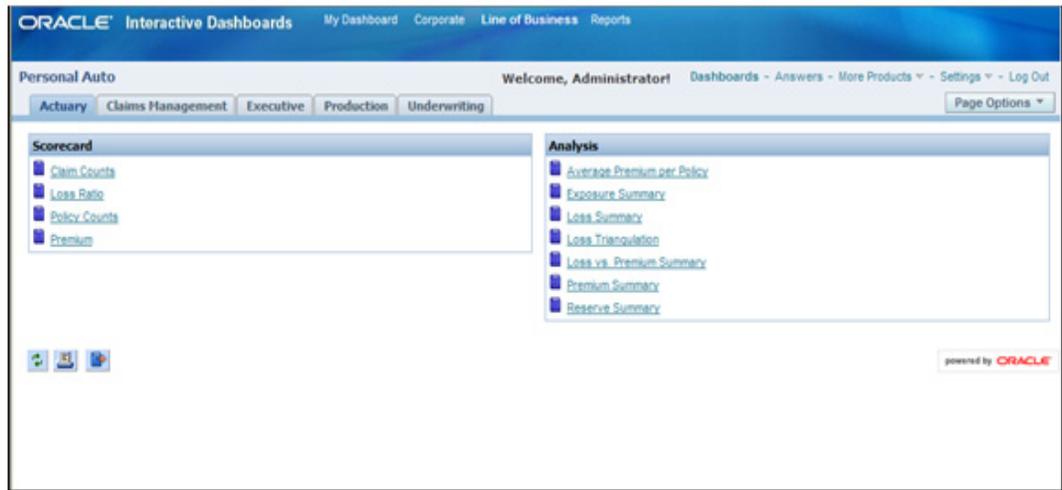


Figure 14: Actuary – Line of Business

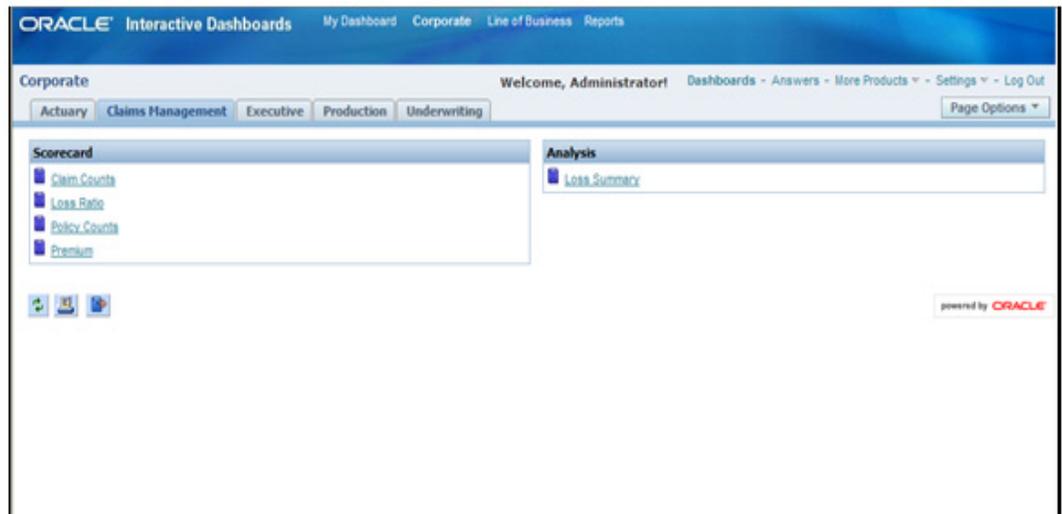


Figure 15: Claims Management – Corporate

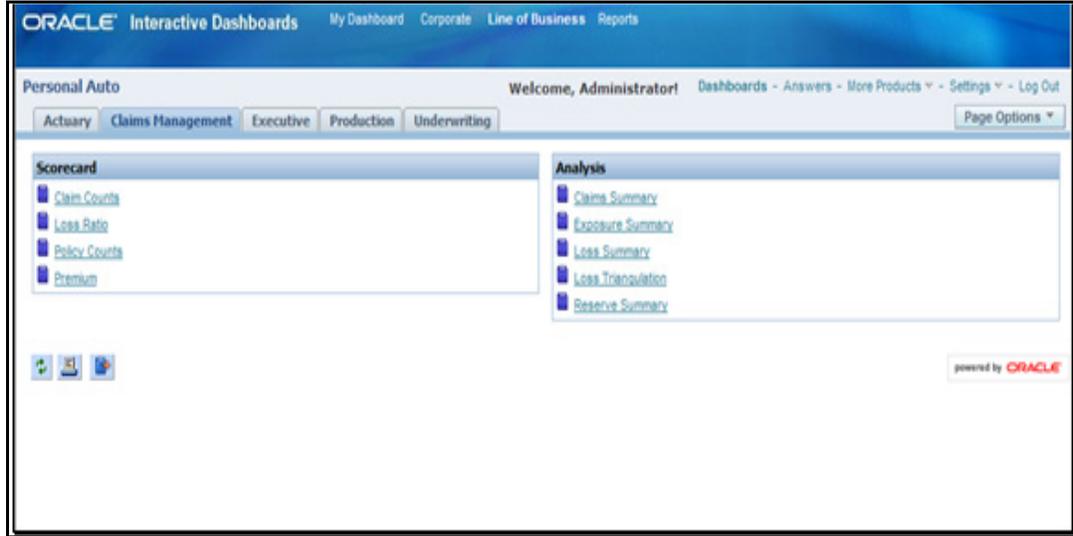


Figure 16: Claims Management – Line of Business

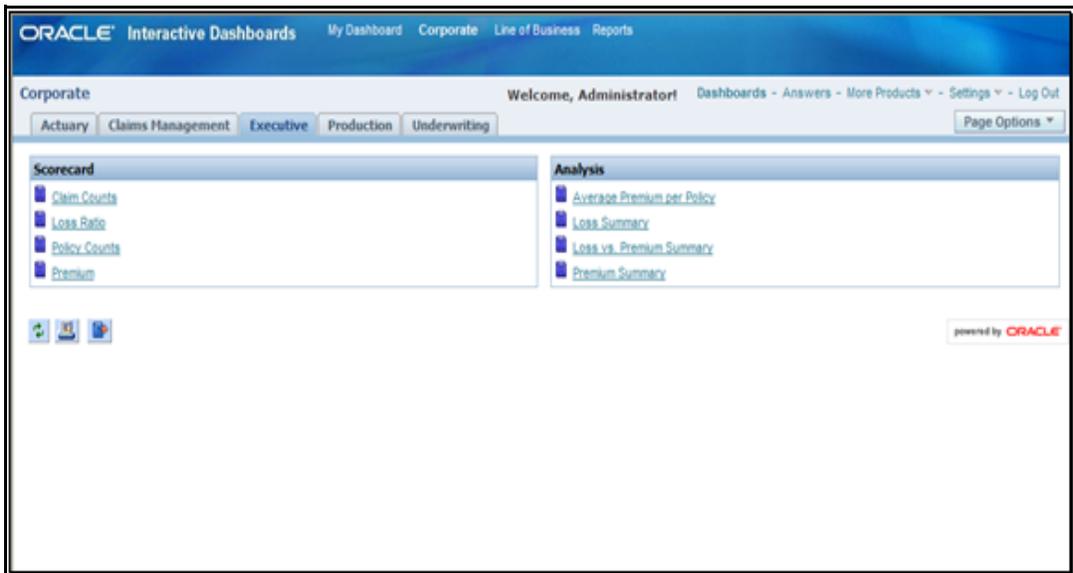


Figure 17: Executive – Corporate

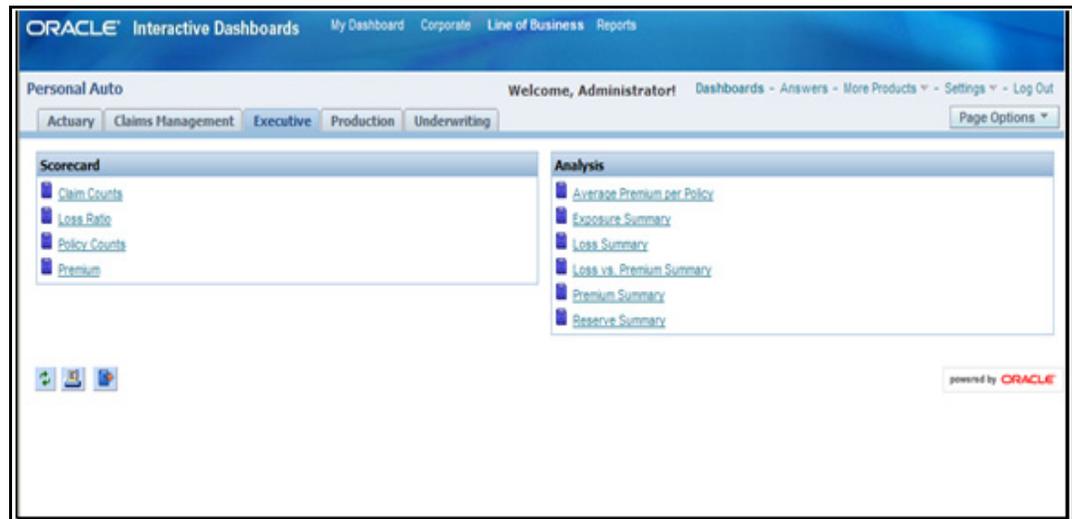


Figure 18: Executive – Line of Business

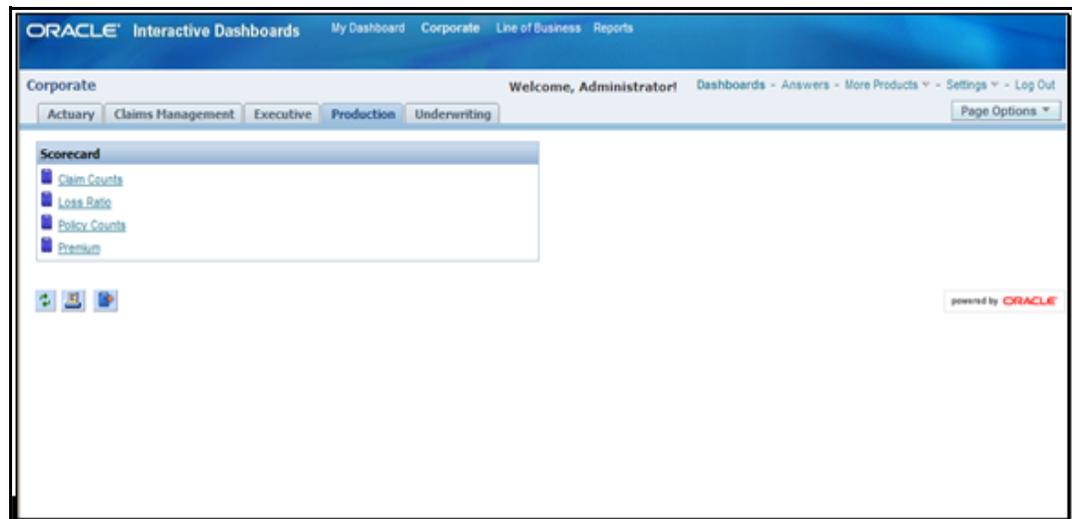


Figure 19: Production – Corporate

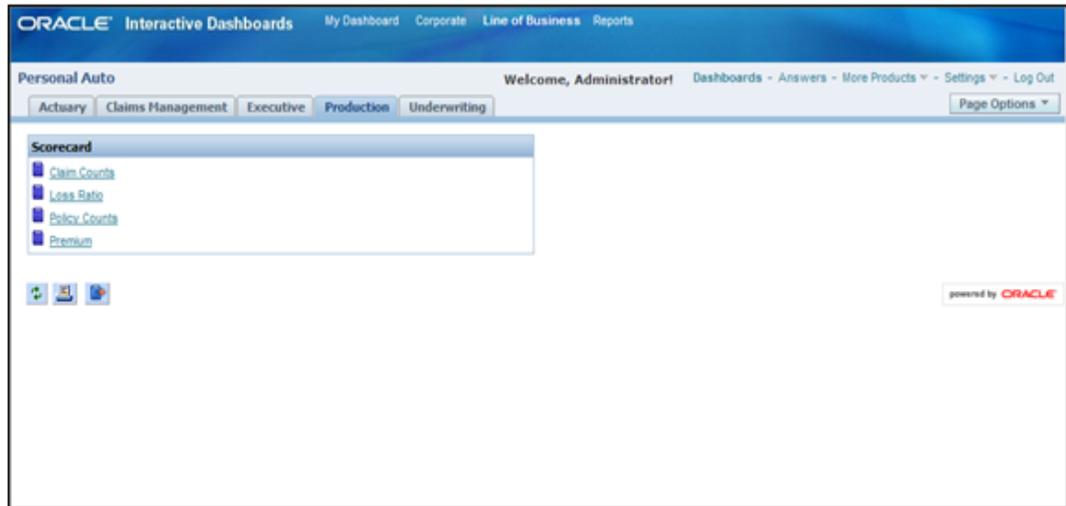


Figure 20: Production – Line of Business

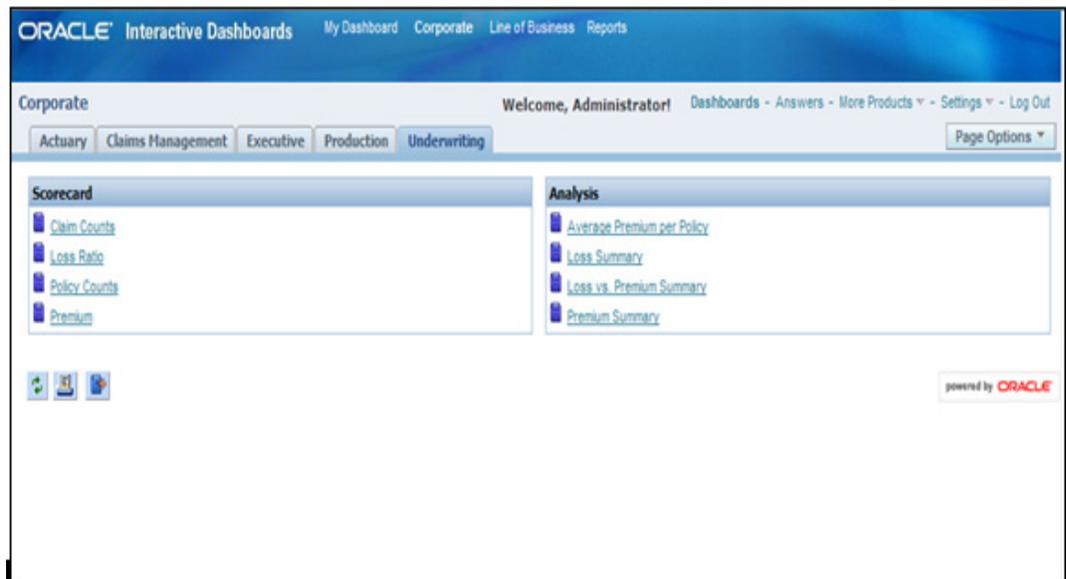


Figure 21: Underwriting - Corporate

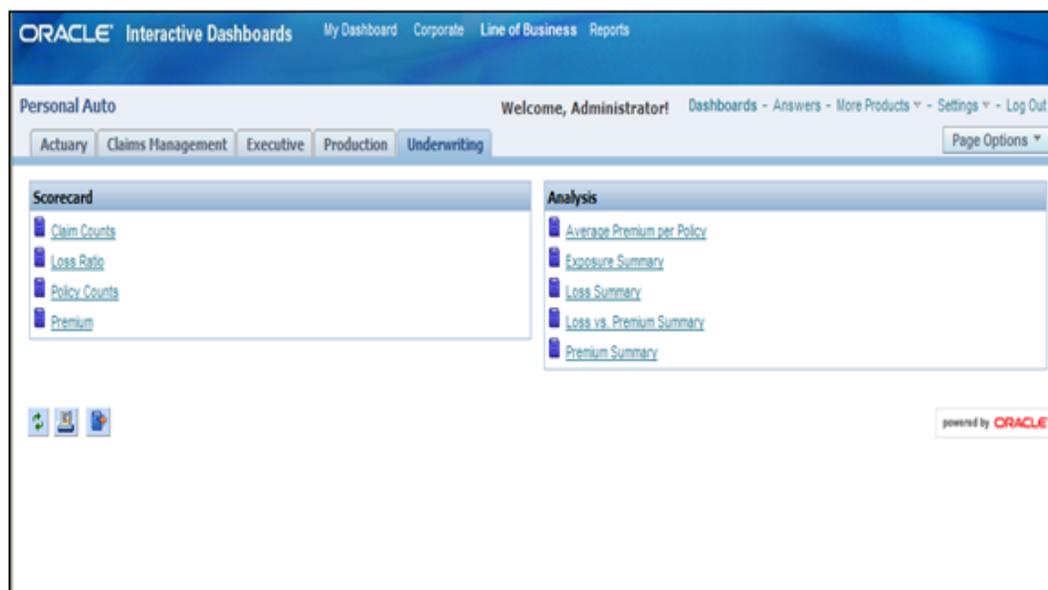


Figure 22: Underwriting – Line of Business

SELECTING A CORPORATE OR LINE OF BUSINESS MART

The OII marts are a set of "Query Ready" tables designed to support specific analytical requirements. Marts contact fact (metric) and dimension (filter) tables and are segmented by application and by line of business. The mart category you select determines not only what reports will be available on the Analysis dashboard but also what filters and metrics you will be working with in the Scorecard and Analysis reports.

The **Corporate** link and **Line of Business** drop-down list are located at the menu at the top of the screen. Corporate is the default mart. This is the mart which is selected when you first log into the system. The name of the selected mart appears in the left hand side of whatever page you are on while in the Scorecard and Analysis Dashboards.

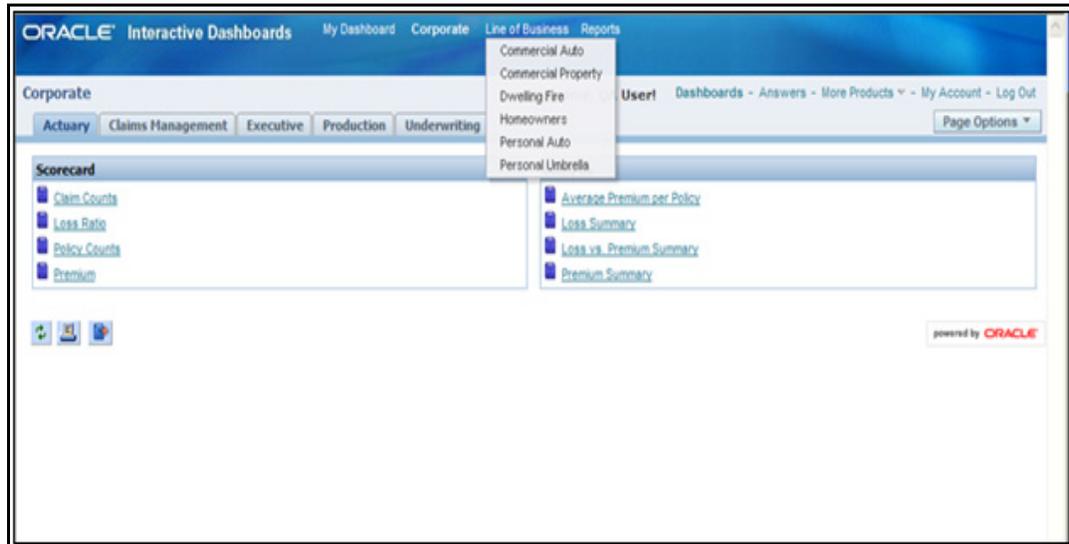


Figure 23: Line of Business Drop-Down List

Each mart is presented to you as a category. There are various mart categories provided within OII.

- **Corporate** – Corporate groups data by underwriter, agent, company, or line of business with the ability to drill down to a policy coverage level. Corporate provides data across all lines of business.
- **Line of Business** – The Line of Business list lets you filter on data specific to the line of business. These attributes can be selected individually or in combination to analyze data at very deep levels of detail.

Lines of Business include:

- Commercial Auto
- Commercial Property
- Dwelling Fire
- Homeowners
- Personal Auto
- Personal Umbrella

Note Only one mart category can be selected at any given time.

REPORT SETUP IN THE SCORECARD AND ANALYSIS DASHBOARDS

Report setup in the Scorecard and Analysis dashboards involves selecting a year and other filter information at a set of prompts on the top of the page. The results appear on the lower portion of the screen in a chart and/or table format.

The filter prompts contain attributes that are specific to the selected Corporate or Line of Business mart. Filters represent elements by which the metrics in a report can be analyzed.

The exact prompts and their contents will vary depending on the report as well as the type of mart that is currently selected. Not making any selections at a prompt means that all available data for that filter will be included in the data analysis.

Note Refer to “Appendix A: Filters” for a list of filters, organized by filter category, for each supported mart in OII. Also, Answers displays all filters along with their descriptions for each supported mart.

SELECTING FILTER INFORMATION AT THE PROMPTS

The following example shows how to select filter information for a Personal Auto’s Loss Ratio report on the Scorecard dashboard.

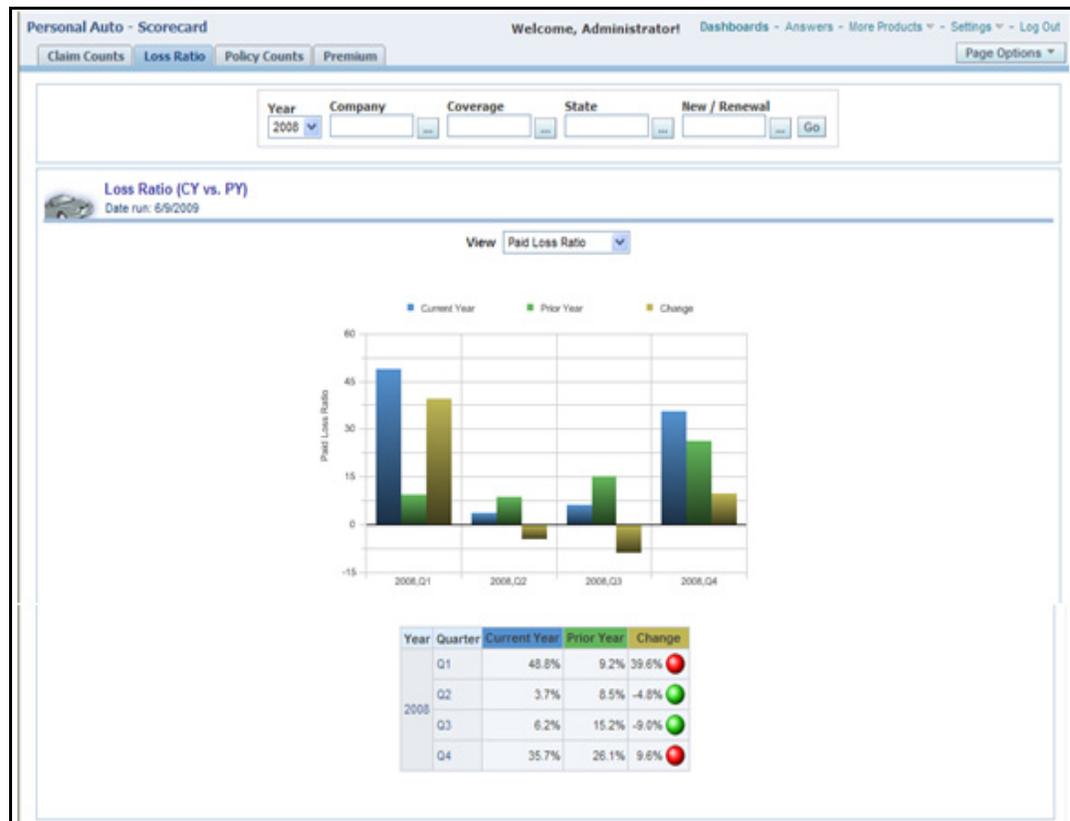


Figure 24: Selecting Filters for a Loss Ratio Scorecard Report (Personal Auto)

To specify the filters for a Loss Ratio report:

1. Select the appropriate year from the **Year** drop-down list or accept the default time range, which is the current year.
2. Click on the  button at the Company field. A box containing available companies will open:

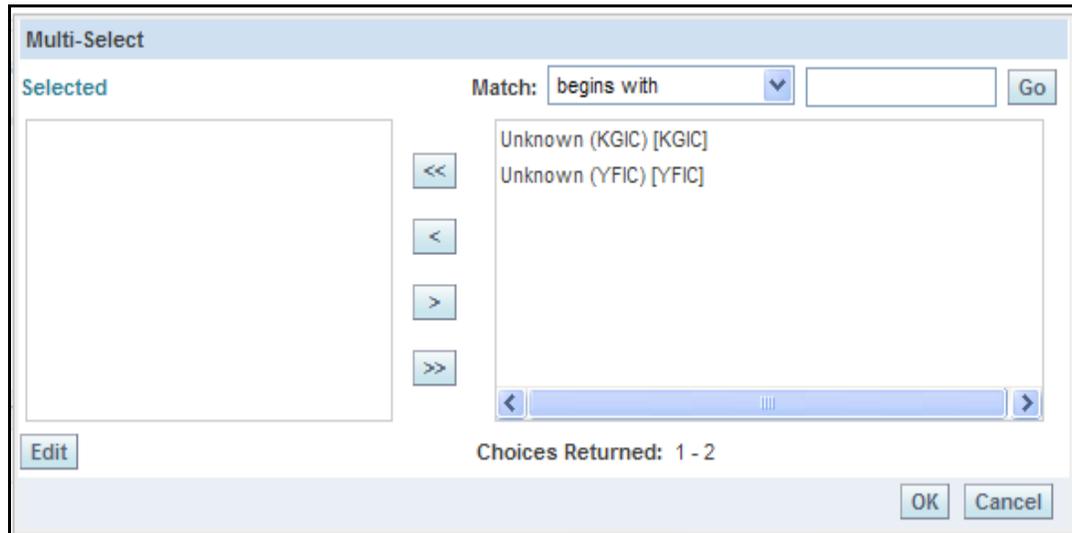


Figure 25: Select Company Fields

Note If none of the filters in a filter category are selected, such as “Company”, then data for all companies will be selected.

To include or remove items listed:

- Click the  button to move all items in the right list box to the **Selected** box.
- Double-click a name in the list box on the right or highlight a name in the right list box and click the  button to move it into the **Selected** box.
- Click the  button to move all items in the **Selected** box to the right list box.
- Double-click a name in the **Selected** box or highlight a name and click the  button to move it into the right list box.

To search for an item in a list:

- Enter part of or the whole name in the text box above the right list box, select the corresponding filter from the Match: drop-down list, and select the **Go** button.

To edit an item in the Selected list:

- Highlight a name in the Selected list and press the **Edit** button. A text box containing the selected item will appear on the screen. Edit the item and click **OK** to close the text box and save your changes.

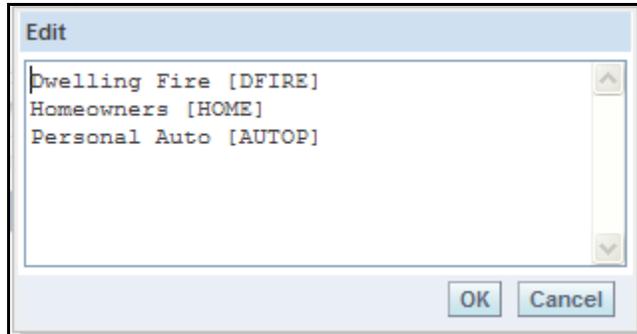


Figure 26: Edit an Item in a Selected List

3. Select as many items as necessary to setup the report.
4. Once all choices are made, click the **OK** button to save the selections and close the dialog box.
5. Repeat steps 1-4 to select the rest of the filters as needed.
6. When all items are selected select the **Go** button. The following indicator will appear:

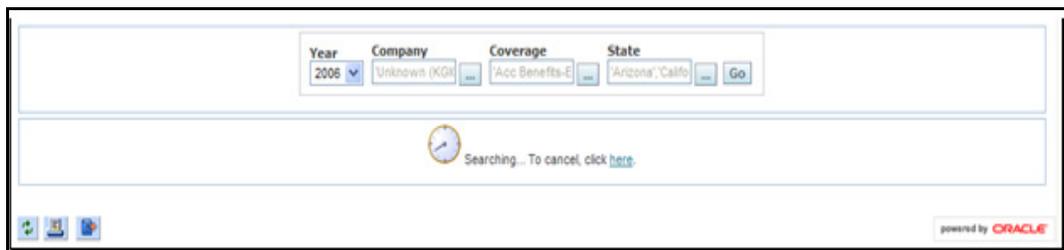


Figure 27: Generating a Report

- Click the **here** link at any time to terminate the function.
- The results will appear in the lower half of the page.

Refer to *Chapter 4: Scorecard Dashboard* for a complete description of each individual report on these dashboards.

Chapter 4

Scorecard Dashboard

The Scorecard Dashboard allows users to run four separate reports which show changes for previous and prior year data for a specific high level metric. The reports available on the Scorecard dashboard are the same for all roles and mart categories:

- Claim Counts
- Loss Ratio
- Policy Counts
- Premium

Click on a report name on the Scorecard dashboard to open a report.

The layout of a report is essentially the same for each report. The tabs on top allow you to easily move from one report to another. Information for the analysis is entered at the prompts at the top of the page. These prompts will be different depending upon the report as well as the selected mart (Corporate or Line of Business).

The results for a Scorecard report are displayed in the lower portion of the screen in a chart and table format. The exact layout of the table and chart for each Scorecard report will be different depending on the selected mart (Corporate vs. Line of Business). A Line of Business report displays results specific to the selected Line of Business.

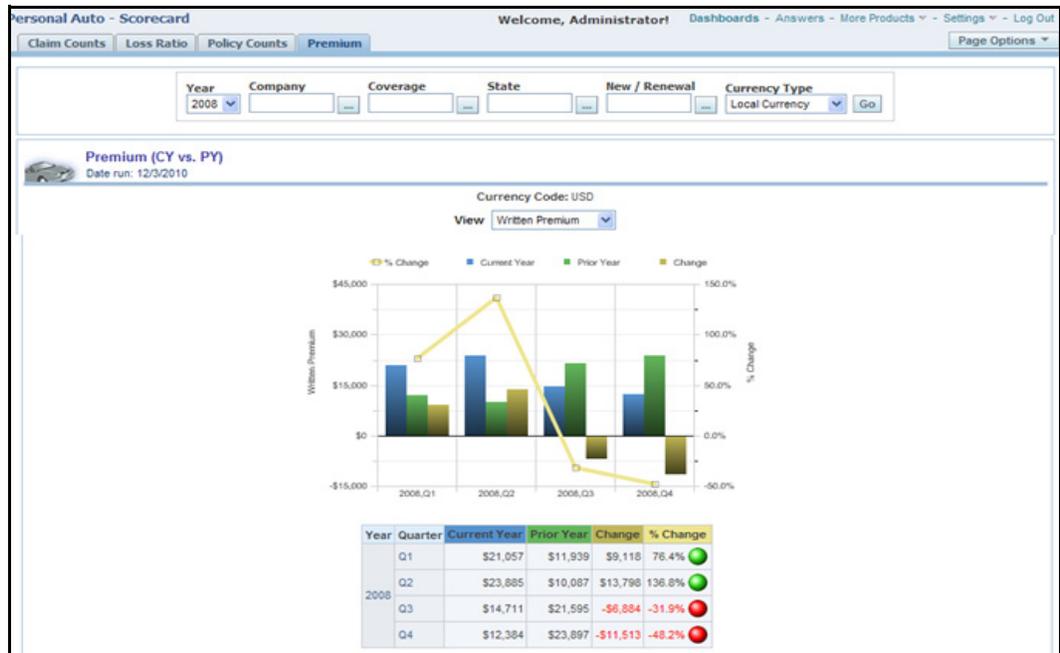


Figure 28: Premium Results for Personal Auto

A Corporate report shows data across all lines of business.



Figure 29: Premium Results for Corporate

RUNNING A SCORECARD DASHBOARD REPORT

The Scorecard reports are different for the Corporate and Line of Business marts. This section describes how to setup and run each type of reports for both marts.

LINE OF BUSINESS

The steps for setting up and running the Scorecard reports are the same for all Lines of Business. The sample Line of Business used in this section is Personal Auto.

Claim Counts

Claim Counts shows changes in claim counts over a current and prior year period.

Step 1 Select the **Year** from the Year drop-down list.

Step 2: Select the filters for the analysis from the appropriate choice list boxes:

- a. **Company** – the name(s) of the company.
- b. **Coverage** – the type(s) of coverage unique to this Line of Business.
- c. **State** – the state or geopolitical area.

Step 3: Select the **Go** button. The results will appear on the lower half of the page.

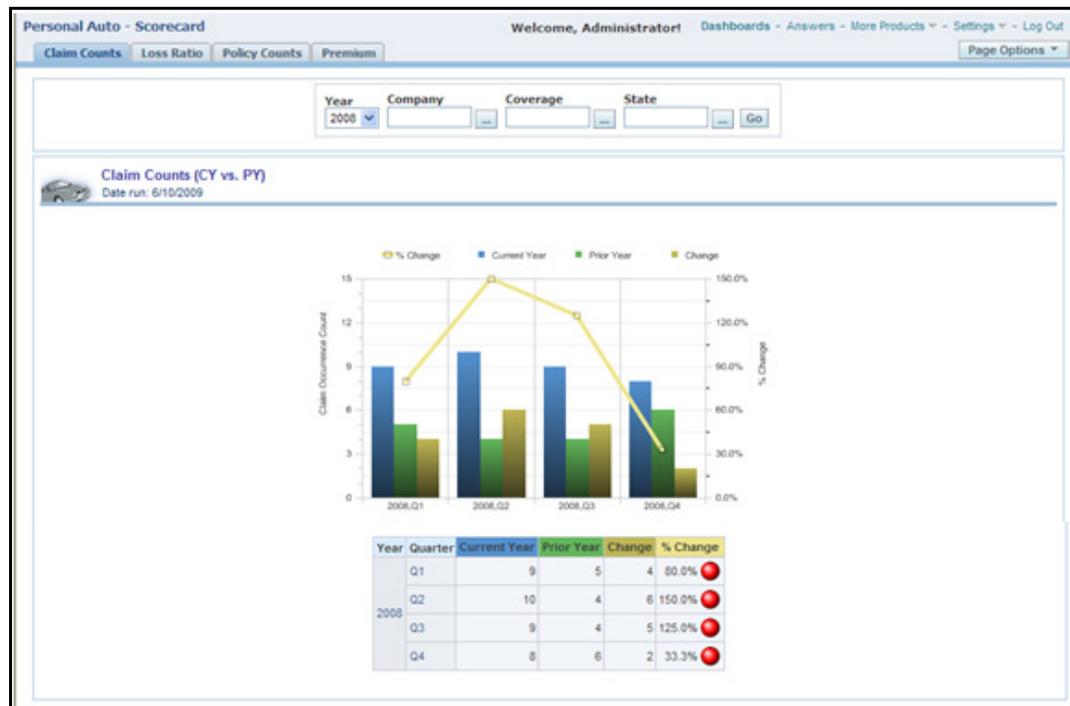


Figure 30: Claim Counts (Personal Auto)

Loss Ratio

Loss Ratio shows changes for a selected loss ratios metric for a current and prior year period.

Step 1: Select the **Year** from the Year drop-down list.

Step 2: Select the filters for the analysis from the appropriate choice list boxes:

- a. **Company** – the name(s) of the company.
- b. **Coverage** – the type(s) of coverage unique to this Line of Business.
- c. **State** – the state or geopolitical area.
- d. **New/Renewal** – indicator that this is a new or renewal policy.
- e. **Currency Type** - the type of currency.

Step 3: Select the **Go** button. The results will appear on the lower half of the page.

Step 4: View the results for a specific loss ratio metric by selecting it from the drop-down list. The choices are:

- Incurred Loss Ratio
- Paid Loss Ratio

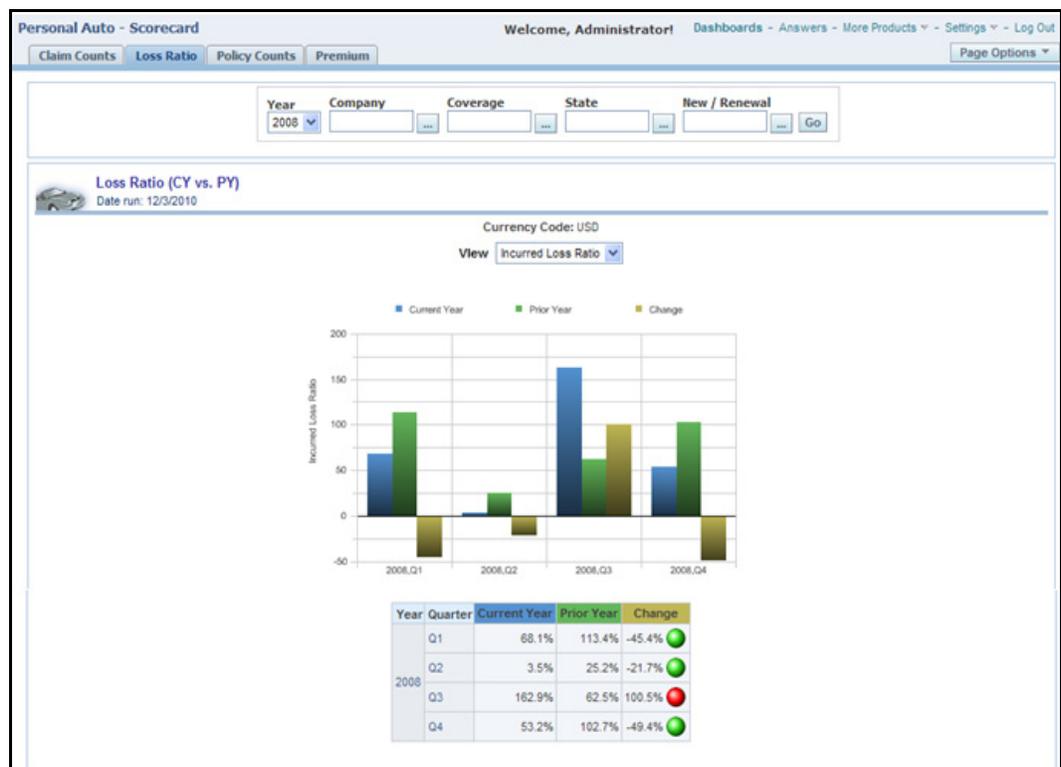


Figure 31: Loss Ratio (Personal Auto)

Policy Counts

Policy Counts shows changes for a selected policy count metric for a current and prior year time period.

Step 1: Select the **Year** from the Year drop-down list.

Step 2: Select the filters for the analysis from the appropriate choice list boxes:

a. Company – the name(s) of the company.

b. Coverage – the type(s) of coverage unique to this Line of Business.

c. State – the state or geopolitical area.

d. New/Renewal - the code indicating whether it is a New or Renewal policy.

Step 3: Select the **Go** button. The results will appear on the lower half of the page.

Step 4: View the results for a specific policy count metric by selecting it from the drop-down list. The choices are:

- Written Policy Count
- Expired Policy Count
- Retained Policy Count
- Cancelled Policy Count

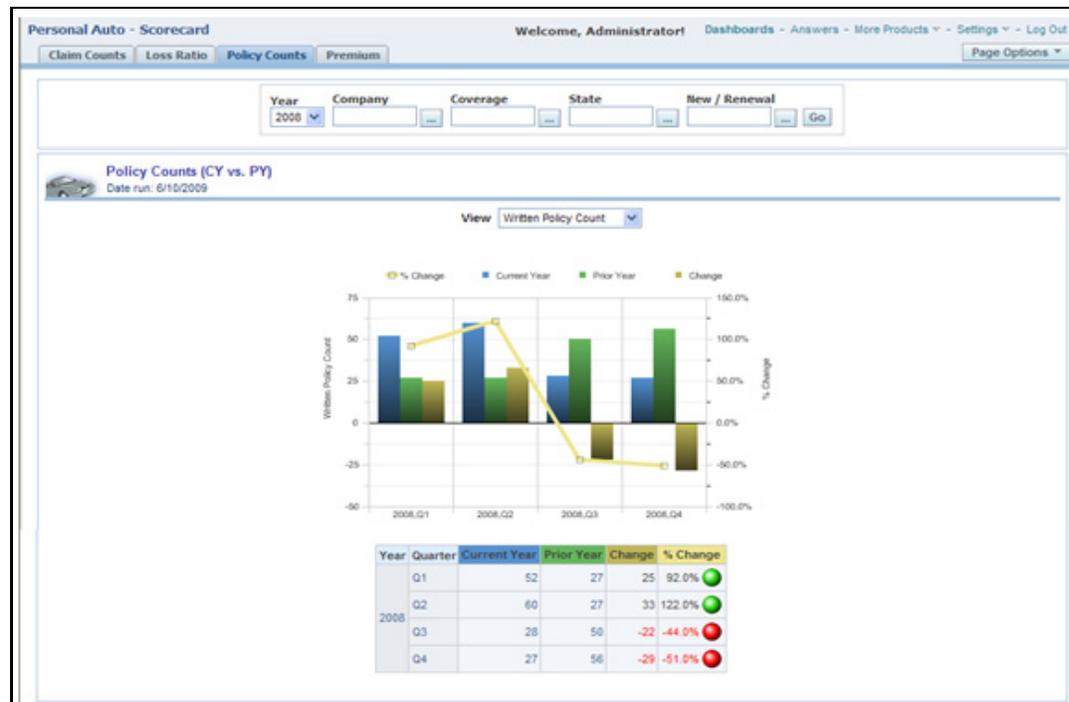


Figure 32: Policy Counts (Personal Auto)

Premium

Premium shows changes in a specific premium metric between a current year and prior year time period.

Step 1 Select the **Year** from the Year drop-down list.

Step 2: Select the filters for the analysis from the appropriate choice list boxes:

- a. **Company** – the name(s) of the company.
- b. **Coverage** – the type(s) of coverage unique to this Line of Business.
- c. **State** – the state or geopolitical area.
- d. **New/Renewal** - the code indicating whether it is a New or Renewal policy.
- e. **Currency Type** - the type of currency.

Step 3: Select the **Go** button. The results will appear on the lower half of the page.

Step 4: View the results for a specific premium metric by selecting it from the drop-down list. The choices are:

- Written Premium
- Earned Premium
- Cancelled Premium

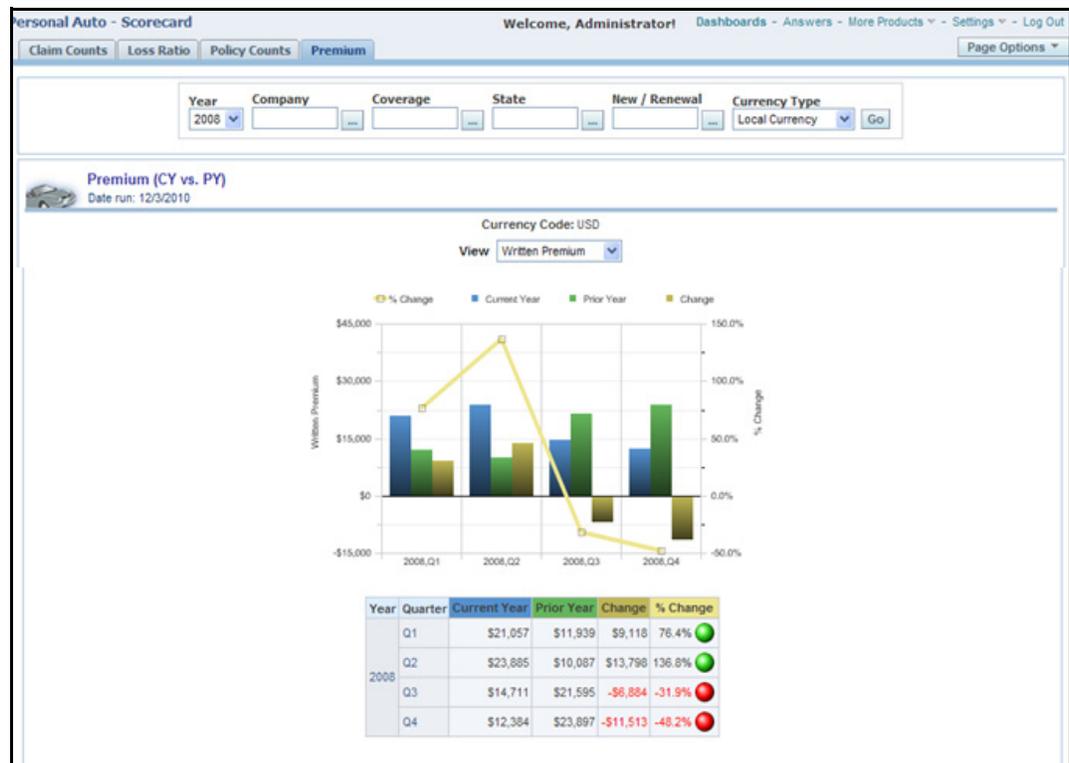


Figure 33: Premium (Personal Auto)

CORPORATE

This section describes how to setup and run the Scorecard reports for Corporate.

Claim Counts

The Claim Counts for Corporate shows changes in a selected Claim Count metric for a current and prior year period for one or more selected lines of business.

Step 1 Select the **Year** from the Year drop-down list.

Step 2: Select the filters for the analysis from the appropriate choice list boxes:

a. Line of Business – the name(s) of the Line of Business.

b. Company – the name(s) of the company.

c. State – the state or geopolitical area.

Step 3: Select the **Go** button. The results will appear on the lower half of the page.

Step 4: View the results for a specific claim count metric by selecting it from the drop-down list. The choices are:

- Claim Occurrence Count
- Claimant Count

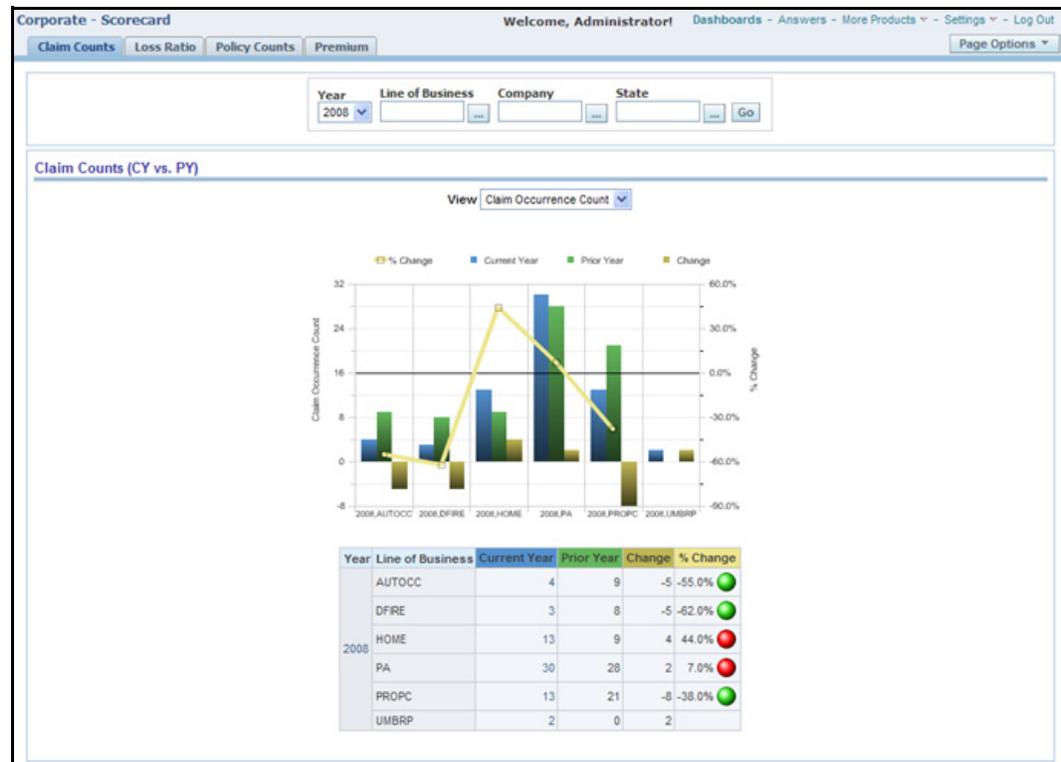


Figure 34: Claim Counts (Corporate)

Loss Ratio

The Loss Ratio for Corporate shows changes for a Loss Ratio metric between a current and prior year period for one or more selected lines of business.

- Step 1** Select the **Year** from the Year drop-down list.
- Step 2:** Select the filters for the analysis from the appropriate choice list boxes:
- a. **Line of Business** – the name(s) of the Line of Business.
 - b. **Company** – the name(s) of the company.
 - c. **State** – the state or geopolitical area.
 - d. **New/Renewal** – indicator that this is a new or renewal policy.
 - e. **Currency Type** - the type of currency.
- Step 3:** Select the **Go** button. The results will appear on the lower half of the page.
- Step 4:** View the results for a specific loss ratio metric by selecting it from the drop-down list. The choices are:
- Paid Loss Ratio
 - Incurred Loss Ratio

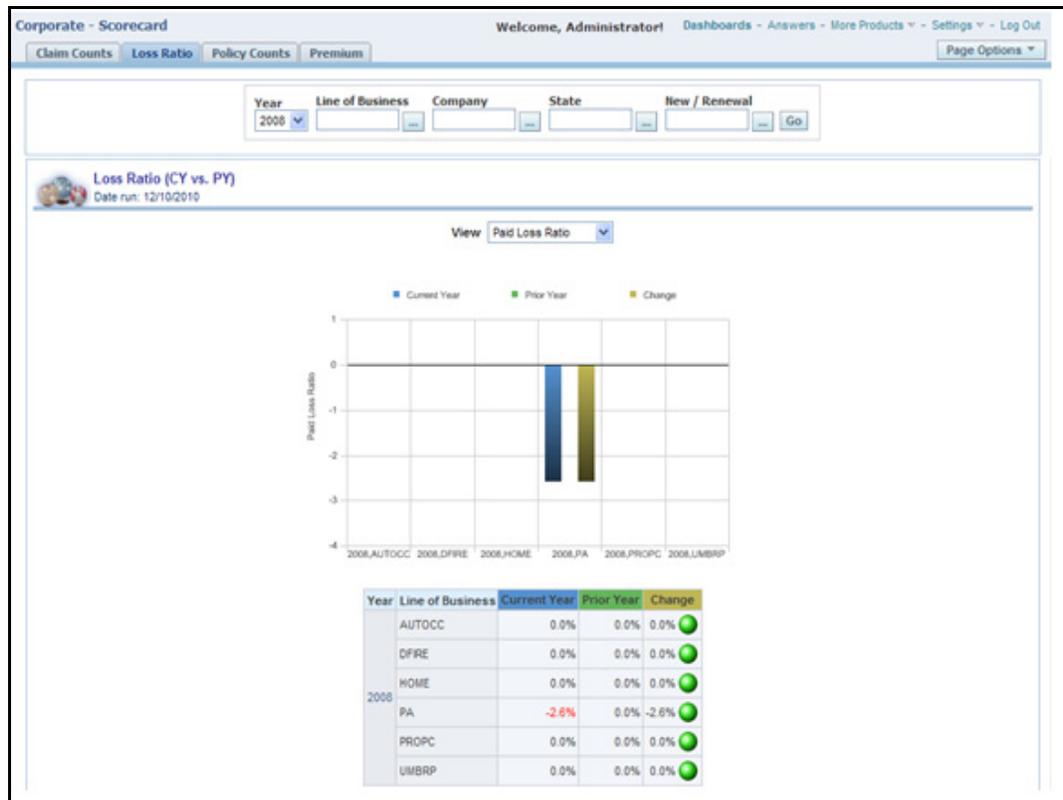


Figure 35: Loss Ratio (Corporate)

Policy Counts

Policy Counts shows changes for policy counts between a current and prior year time period for one or more selected lines of business.

Step 1 Select the **Year** from the Year drop-down list.

Step 2: Select the filters for the analysis from the appropriate choice list boxes:

a. Line of Business – the name(s) of the Line of Business.

b. Company – the name(s) of the company.

c. State – the state or geopolitical area.

d. New/Renewal - the code indicating whether it is a New or Renewal policy.

Step 3: Select the **Go** button. The results will appear on the lower half of the page.

Step 4: View the results for a specific policy count metric by selecting it from the drop-down list. The choices are:

- Written Policy Count
- Expired Policy Count
- Retained Policy Count
- Cancelled Policy Count



Figure 36: Policy Counts (Corporate)

Premium

Premium shows changes in Premiums for a current year and prior year time period for one or more selected lines of business.

- Step 1** Select the **Year** from the Year drop-down list.
- Step 2:** Select the filters for the analysis from the appropriate choice list boxes:
 - a. Line of Business** – the name(s) of the Line of Business.
 - b. Company** – the name(s) of the company.
 - c. State** – the state or geopolitical area.
 - d. New/Renewal** -the code indicating whether it is a New or Renewal policy.
 - e. Currency Type** - the type of currency.
- Step 3:** Select the **Go** button. The results will appear on the lower half of the page.
- Step 4:** View the results for a specific premium metric by selecting it from the drop-down list. The choices are:
 - Written Premium
 - Earned Premium
 - Cancelled Premium

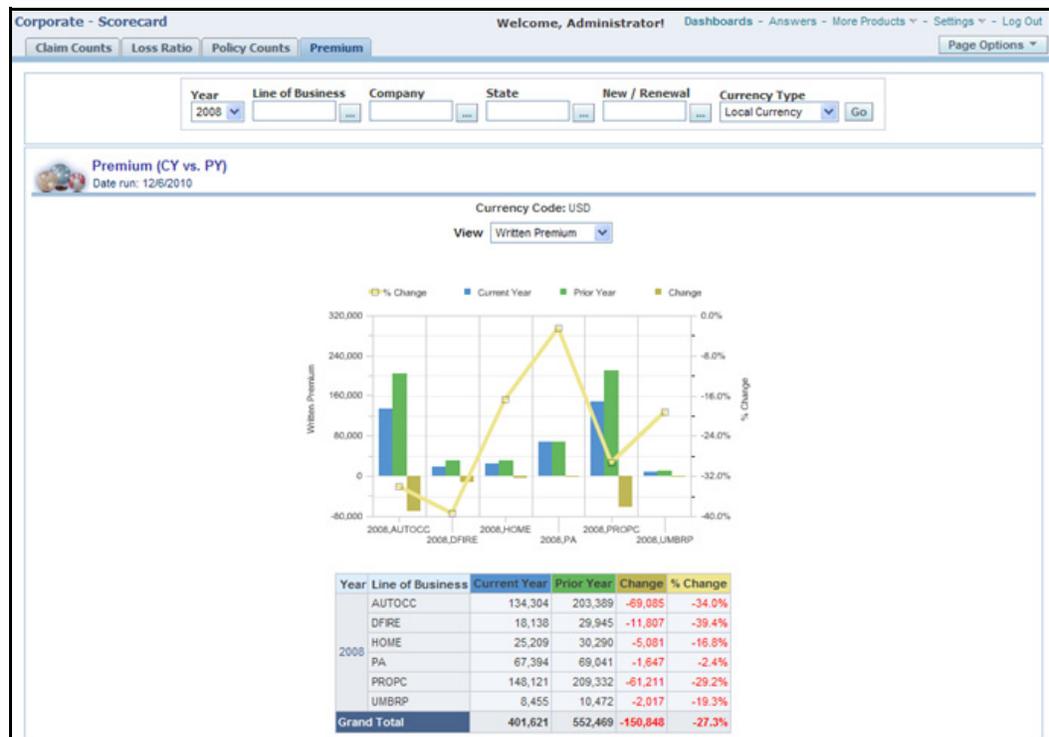


Figure 37: Premium (Corporate)

VIEWING THE RESULTS

The features listed below are available for various Scorecard reports. Note that some of these features are only available for certain types of reports or for certain types of marts (Line of Business vs. Corporate).

- Color coded charts and tables
- Ability to view results by metric
- Positive and negative change indicators in tables
- Rollover feature in charts
- Drill down capabilities in charts and tables
- Display records in the Policy Count report

The following sections describe which features are available for the reports and marts.

COLOR CODED CHARTS AND TABLES

All Scorecard reports use standard colors for all columns and bars in the tables and charts to provide quick interpretation.

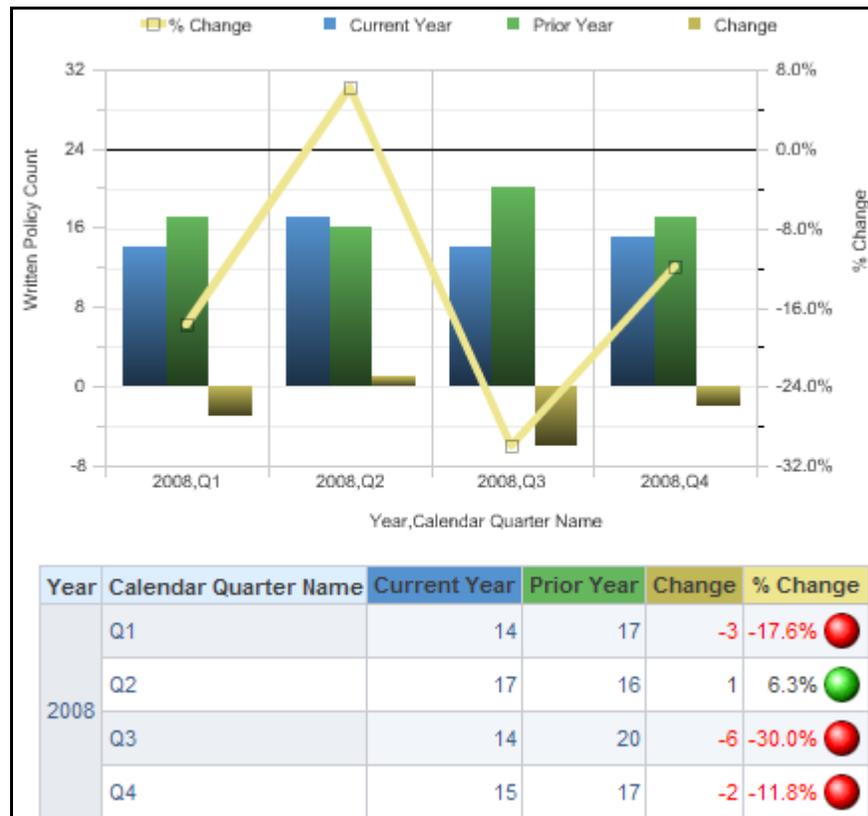


Figure 38: Color Coded Columns and Tables

VIEW THE RESULTS BY METRIC

The Loss Ratio, Policy Counts, and Premium Scorecard reports for Corporate and all Lines of Business allow you to view results by a metric selected from a drop-down list in the Results section of the page. The exact metrics available will vary from report to report.



Figure 39: Policy Counts Results Sorted by Written Policy Count

When you select a metric from the drop-down list the screen will automatically refresh and the new results will appear in the table and chart.



Figure 40: Policy Counts Results Sorted by Expired Policy Count

POSITIVE AND NEGATIVE CHANGE INDICATORS IN TABLES

The red and green spheres in a table indicate positive or negative change for a metric for the time period being measured.

 - Indicates positive change in a specific metric.

 - Indicates negative change in a specific metric.

Keep in mind that these indicators have to be taken in context to the specific metric that is being measured.

For example, the table below is from a Premium report and measures changes in Written Premium between a current and prior year time period. At a glance the results seem fairly obvious. The *increase* in Written Premium for the first and second quarters between the current and prior year is indicated by a green sphere while a *decrease* in Written Premium in the third and fourth quarters are marked by red spheres.

Year	Quarter	Current Year	Prior Year	Change	% Change	
2008	Q1	22,814	11,715	11,099	94.7	
	Q2	21,569	10,321	11,248	109.0	
	Q3	14,538	24,171	-9,633	-39.9	
	Q4	8,473	22,834	-14,361	-62.9	

Figure 41: Changes in Written Premium

However, if we select Cancelled Premium from the drop-down list the following results appear.

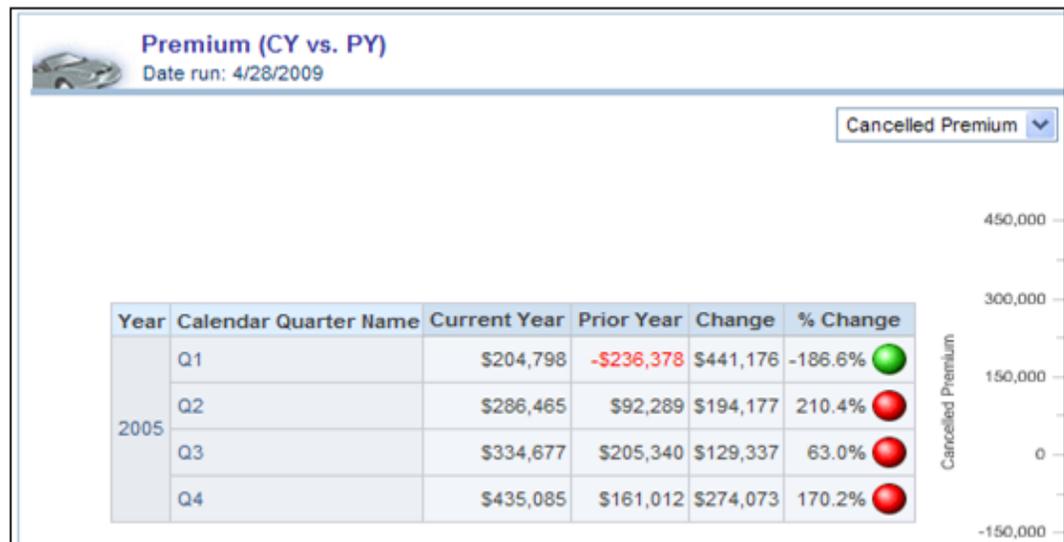


Figure 42: Changes in Cancelled Premium

In the first quarter a *decrease* in the number of Cancelled Premiums is indicated by a green sphere. The *increase* in Cancelled Premiums in the subsequent quarters is marked by a red sphere.

These icons have nothing to do with the actual amount or percentage in the table being positive or negative. They are entirely relative to the metric being measured.

ROLLOVER FEATURE IN CHARTS

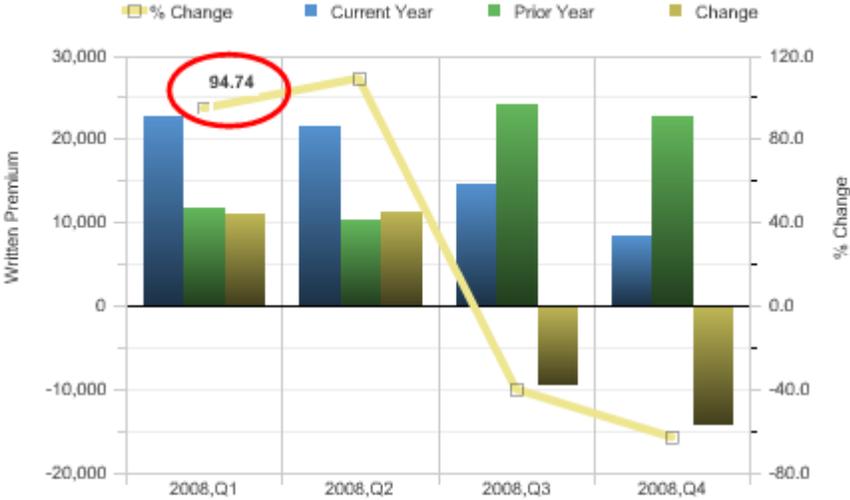
Sections of the chart have rollover capability that will show corresponding data from the table. In the chart below, if you move the cursor over the bar for the Current Year the number of claim counts in the Current Year column appears at the top of the bar.



Year	Quarter	Current Year	Prior Year	Change	% Change
2008	Q1	22,814	11,715	11,099	94.7 ●
	Q2	21,569	10,321	11,248	109.0 ●
	Q3	14,538	24,171	-9,633	-39.9 ●
	Q4	8,473	22,834	-14,361	-62.9 ●

Figure 43: Rollover Capabilities in Charts

If you hover over any point in the line above the chart it will show the percentage from the applicable % Change column.



Year	Quarter	Current Year	Prior Year	Change	% Change
2008	Q1	22,814	11,715	11,099	94.7
	Q2	21,569	10,321	11,248	109.0
	Q3	14,538	24,171	-9,633	-39.9
	Q4	8,473	22,834	-14,361	-62.9

Figure 44: Rollover Capabilities in Charts - Change by Percentage

DRILL DOWN CAPABILITY IN TABLES AND CHARTS

The drill down feature in the Scorecard reports allows you to click on an active portion of a graph or table and expand the data view to a lower level.

- All Scorecard reports have the ability to drill down on a time period in a chart or table.
- The Policy Count report for all lines of business allows you to drill down on the amounts in a table's Current Year column.

The figure below shows the Claim Counts report results for Personal Auto and the drill down links in the chart and table.

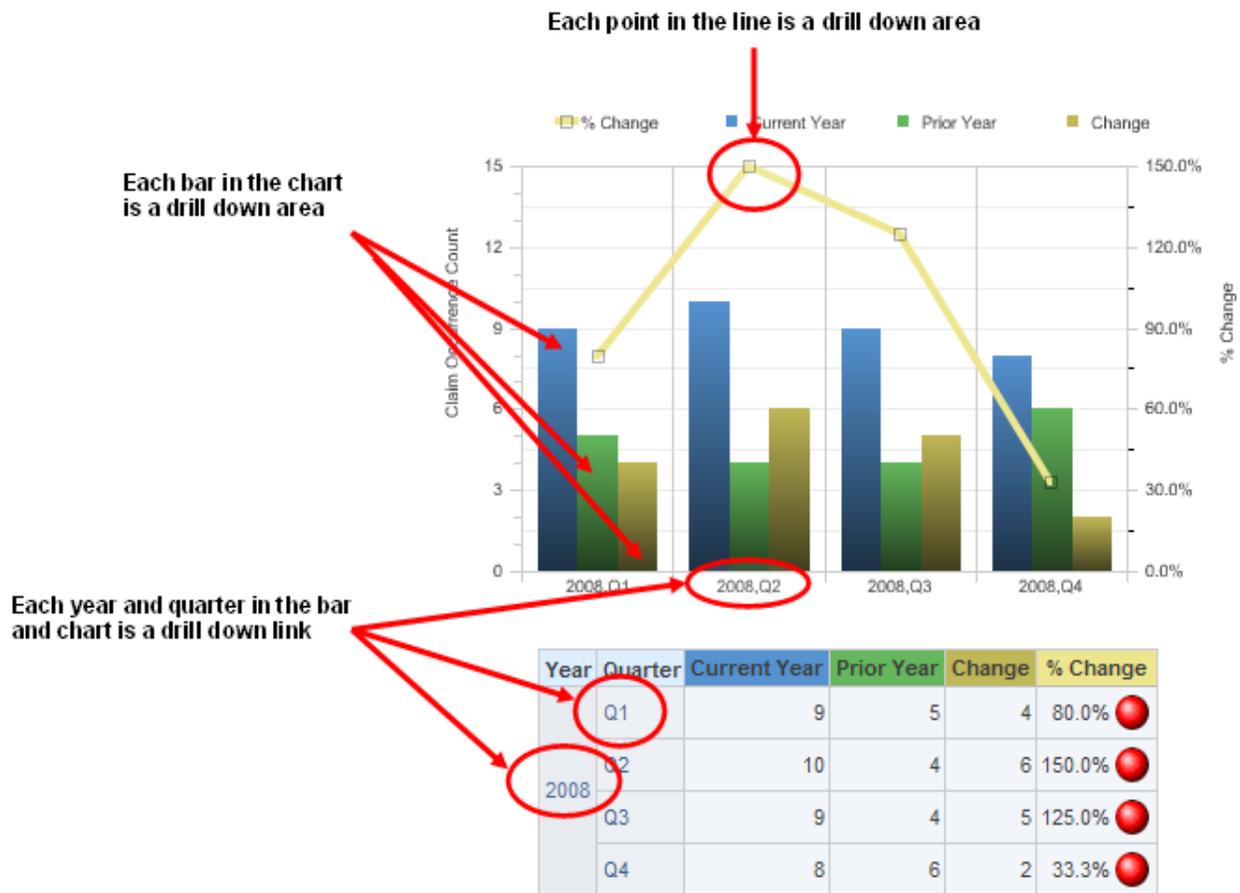


Figure 45: Drill Down Areas in the Table and Chart

To preserve data as you move up and down the drill down path, do not use the Back button on your browser. Instead, use the Return and Back links below the results.

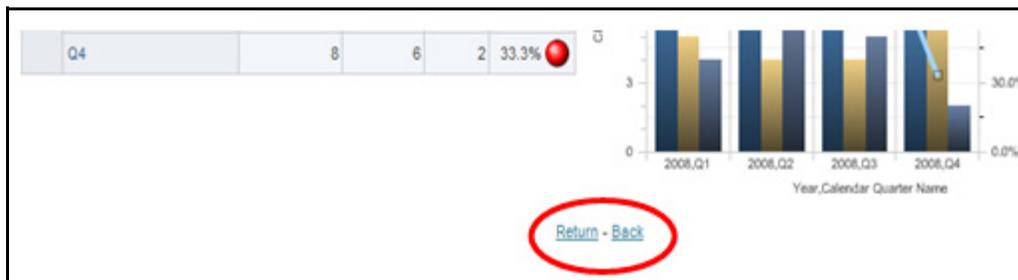


Figure 46: Return and Back Links

Return - returns you to the original page of results.

Back - drills up to the previous level of results.

The figures on the following pages illustrate the separate drill down paths for a Claim Counts report.

Example 1 – Drill Down by Quarter in a Table

The following example shows the drill down paths in a table in a Claim Counts report.

- (1) The initial results show the current and prior year claim counts by year and quarter.
- (2) The next level shows the results in the chart/table by month for a selected quarter.

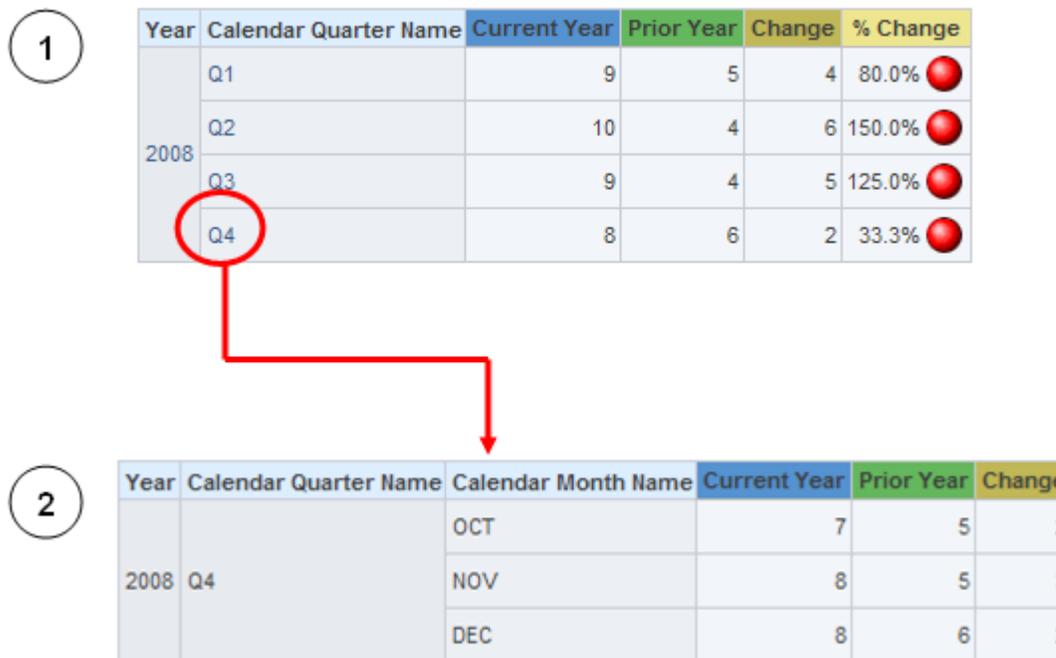


Figure 47: Drill Down by Quarter-Month in a Table

Example 2 – Drill Down by Quarter in a Chart

The following example shows the drill down paths in a chart in a Claim Counts report.

(1) The initial results show the current and prior year claim counts by year and quarter.

Click on any of these areas in the chart to drill down to the next level:

- A point in the line
- Any bar in the chart
- The caption beneath one of the four quarters

(2) The next level shows the results in the chart/table by month for a selected quarter.

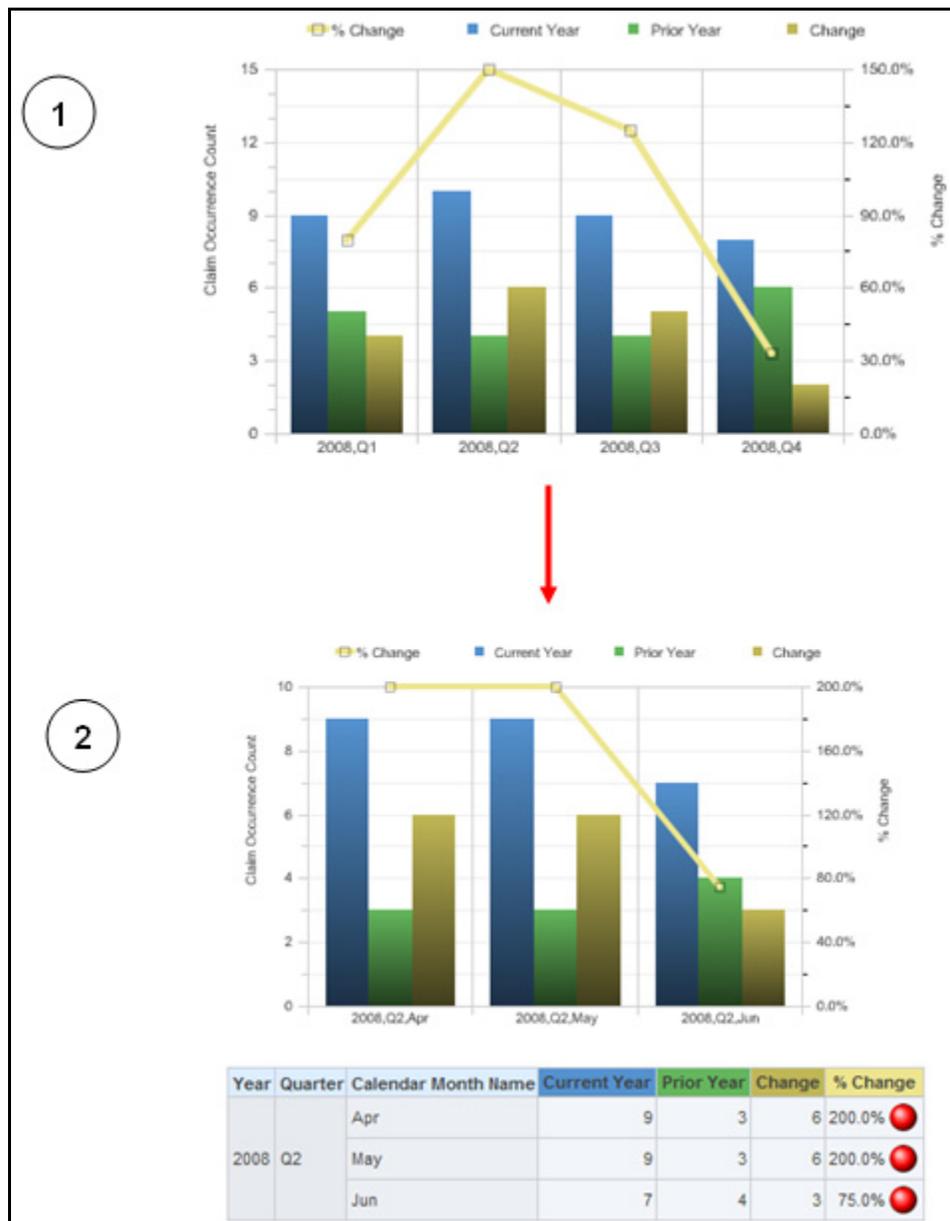


Figure 48: Drill Down by Quarter-Month in a Chart

Example 3 – Drill Down by Year in a Table

The following figure depicts an alternate drill down path for Example 1 in which you can select the year to drill down to month-quarter.

Note This level of drill down is not available in the chart.

- (1) The initial results show the current and prior year claim counts by year and quarter. Instead of drilling down on a quarter, click on the year in the Year column:
- (2) The results display data by month and quarter for the entire year.

Year	Calendar Quarter Name	Current Year	Prior Year	Change	% Change
2008	Q1	9	5	4	80.0%
	Q2	10	4	6	150.0%
	Q3	9	4	5	125.0%
	Q4	8	6	2	33.3%

Year	Calendar Month Name	Calendar Quarter Name	Current Year	Prior Year	Change	% Change
2008	JAN	Q1	6	4	2	50.0
	FEB	Q1	6	3	3	100.0
	MAR	Q1	9	3	6	200.0
	APR	Q2	9	3	6	200.0
	MAY	Q2	9	3	6	200.0
	JUN	Q2	7	4	3	75.0
	JUL	Q3	7	3	4	133.3
	AUG	Q3	7	4	3	75.0
	SEP	Q3	8	3	5	166.7
	OCT	Q4	7	5	2	40.0
	NOV	Q4	8	5	3	60.0
	DEC	Q4	8	6	2	33.3

Figure 49: Drill Down by Year-Month-Quarter

DRILL DOWN IN THE POLICY COUNT REPORT

The Policy Count report allows users to drill down on policy count amounts in a table's Current Year column to display records for all policies in the selected time period.

The example below shows a Policy Count table sorted by written policy counts for 2008. The policy counts under the Current Year column are active drill down links. When you click on a policy count a table of records will open on a new page.

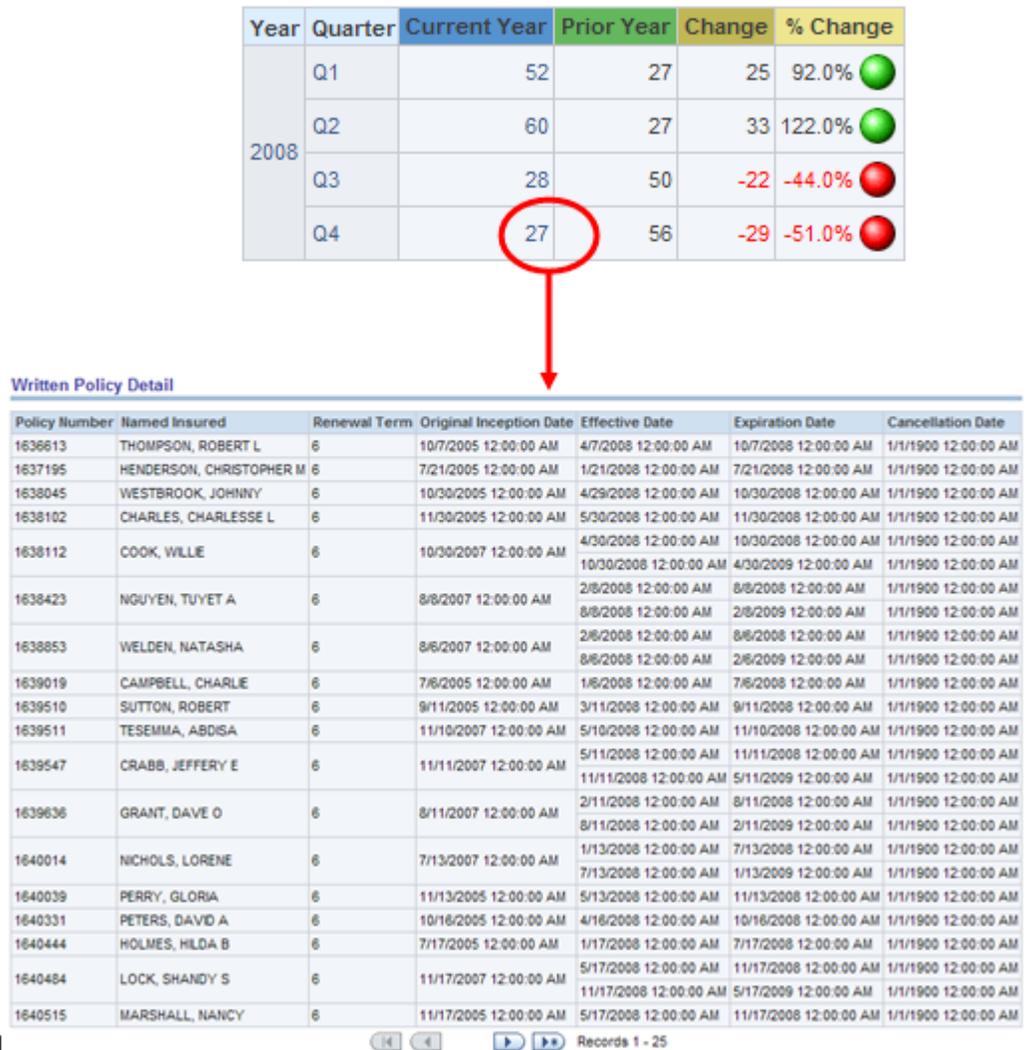


Figure 50: Drill Down by Current Year Policies

- This feature only applies to Policy Count reports for the Lines of Business. It is not available in the Policy Count report for the Corporate mart.
- This level of drill down ability is only supported in the table. It is not available in the chart.

Chapter 5

Analysis Dashboard

The Analysis Dashboard allows users to run a series of high level business reports:

- Average Premium Per Policy
- Exposure Summary
- Loss Summary
- Loss Triangulation
- Loss vs. Premium Summary
- Premium Summary
- Reserve Summary

When selected, each report opens on a separate page. The available reports are based on the role(s) of the current user as well as the selected mart. The tables below show which analysis is assigned to which role for Corporate and Lines of Business.

Corporate

Corporate has the following four reports assigned across the five OII roles:

Table 4: Corporate- Reports by Role

Report	Actuary	Claims Management	Executive	Production	Underwriting
Average Premium per Policy	X		X		X
Loss Summary	X	X	X		X
Loss vs. Premium Summary	X		X		X
Premium Summary	X		X		X

Lines of Business

The Lines of Business have the following available reports assigned across these roles:

Table 5: Line of Business - Reports by Role

Report	Actuary	Claims Management	Executive	Production	Underwriting
Average Premium per Policy	X		X		X
Claims Summary		X			
Exposure Summary	X	X	X		X
Loss Summary	X	X	X		X
Loss Triangulation	X	X			
Loss vs. Premium Summary	X		X		X
Premium Summary	X		X		X
Reserve Summary	X	X	X		

NAVIGATING AN ANALYSIS REPORT

A typical Analysis report has the same layout as a Scorecard report. The tabbed page allows users to move from one page to another with ease. Users can select filters for the report using a combination of drop-down lists and choice list boxes in the prompts at the top of the page. The exact prompts will vary from report to report.

Figure 51: Analysis Report Prompts

The Analysis report results are displayed in a standard chart and table format. The top section presents the results in a chart format while the bottom half shows the data in a table format.

The Analysis reports have the following features:

- Color coded charts and tables
- Rollover feature in charts
- Sort results by different views
- Drill down capabilities

COLOR CODED CHARTS AND TABLES

Like the Scorecard reports, the Analysis reports have color coded sections in their charts and tables to provide quick interpretation.

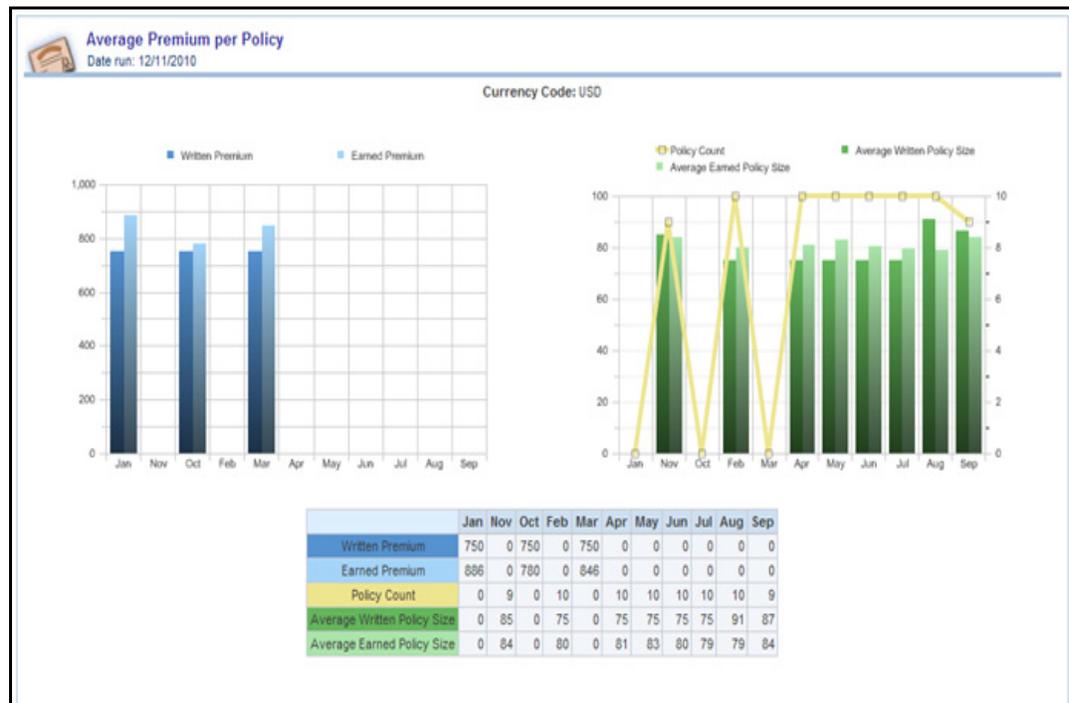


Figure 52: Color Coded Charts and Tables

ROLLOVER IN CHARTS

If you move your cursor over a bar or a point on a line in the chart then the corresponding amount in the table will appear.



Figure 53: Rollover Feature in Chart

SORTING RESULTS BY DIFFERENT VIEWS

Various Analysis reports have drop-down lists which allow you to organize the results in the report by specific fields. These fields will be unique to the selected Line of Business or Corporate mart.

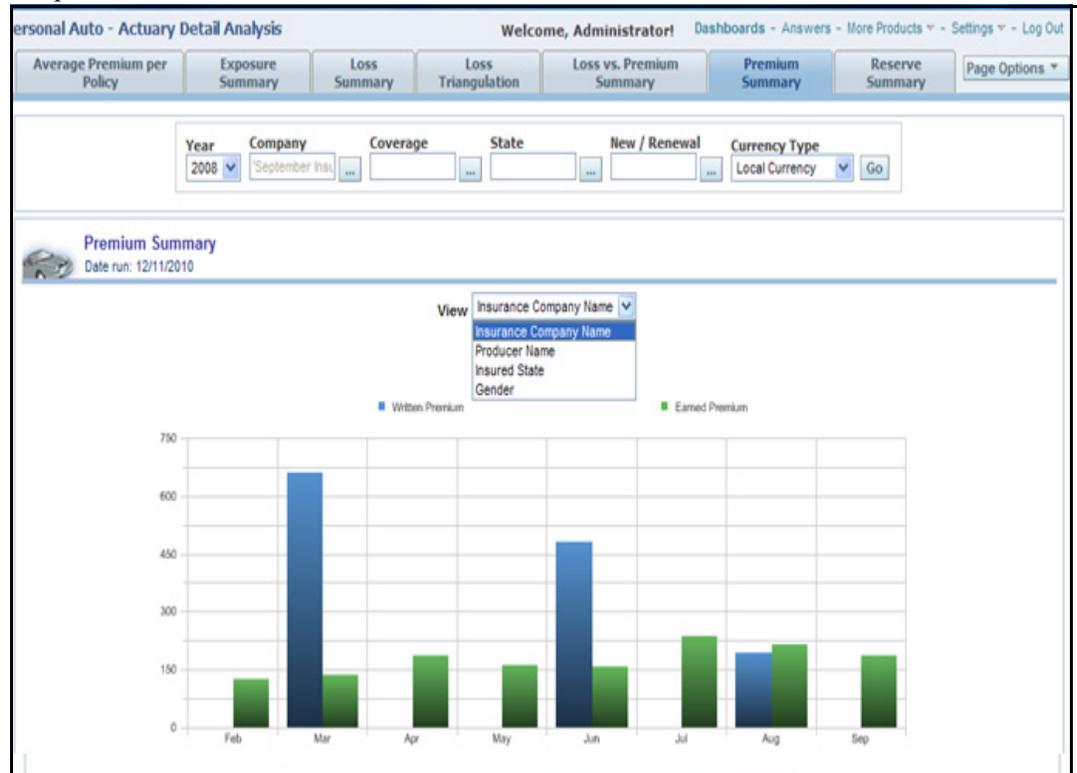


Figure 54: View Drop-Down List

When a user selects a new field from the View list the table will refresh and the data results, which were previously organized, for example, by *Company*...

	Company	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Grand Total
Written Premium	September Insurance	0	662	0	0	482	0	194	0	1,603
Written Premium Total		0	662	0	0	482	0	194	0	1,603
Earned Premium	September Insurance	124	137	187	162	160	236	215	188	1,712
Earned Premium Total		124	137	187	162	160	236	215	188	1,712

...will now be organized by *Gender*:

	Gender	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Grand Total
Written Premium	M	0	0	92	0	0	370	0	194	0	656
	F		0	570	0	0	112	0	0	0	947
Written Premium Total		265	0	662	0	0	482	0	194	0	1,603
Earned Premium	M	151	23	25	36	35	34	96	100	106	607
	F		101	112	151	127	126	139	115	82	1,105
Earned Premium Total		302	124	137	187	162	160	236	215	188	1,712

DRILL DOWN CAPABILITIES IN THE ANALYSIS REPORTS

The Analysis reports allow you to drill down on the state name in a report. The complete drill down path is as follows:

1. The initial results are organized by state name.
2. The next level shows the data by county.
3. The next level shows the data by city.
4. The next level shows the data by district.
5. The last level shows the data organized by Zip Code.

	Insured State	Insured City	Insured County	Feb	Mar	Apr	May	Jun	Jul
Written Premium	TX	Santa Rosa		77	225	30	217	369	11
Written Premium Total				77	225	30	217	369	11
Earned Premium	TX	Santa Rosa		198	178	214	190	158	23
Earned Premium Total				198	178	214	190	158	23

Figure 55: Drill Down Links

RUNNING AN ANALYSIS REPORT

The Analysis reports are different for the Corporate and Line of Business marts. This section describes how to setup and run each type of analysis reports for both marts.

LINE OF BUSINESS

Each Analysis report is the same for all Lines of Business. The sample Line of Business used in this section is Personal Auto.

Average Premium per Policy

The Average Premium per Policy analysis shows a monthly breakdown of written premium, earned premium, policy count, average written policy size, and average earned policy size for a selected year.

Step 1: Select a **Year** from the drop-down menu.

Step 2: Select the filters for the analysis from the appropriate choice list boxes:

- a. **Company** – the name(s) of the company.
- b. **Coverage** – the type(s) of coverage unique to this Line of Business.
- c. **State** – the state or geopolitical area.
- d. **New/Renewal** – the code indicating whether it is a New or Renewal policy.
- e. **Currency Type** - the type of currency.

Step 3: Select the **Go** button. The results will appear on the lower half of the page.



Figure 56: Average Premium per Policy (Personal Auto)

Exposure Summary

The Exposure Summary analysis shows written and earned exposures and their totals across twelve months of a specific year with the results organized according to a selected View.

- Step 1:** Select a **Year** from the drop-down menu.
- Step 2:** Select the filters for the analysis from the appropriate choice list boxes:
 - a. **Company** – the name(s) of the company.
 - b. **Coverage** – the type(s) of coverage unique to this Line of Business.
 - c. **State** – the state or geopolitical area.
 - d. **Currency Type** - the type of currency.
- Step 3:** Select the **Go** button. The results will appear on the lower half of the page.
- Step 4:** Select a **View** from the drop-down list to organize the data in the table. The available Views will be unique to the particular Line of Business you are using.

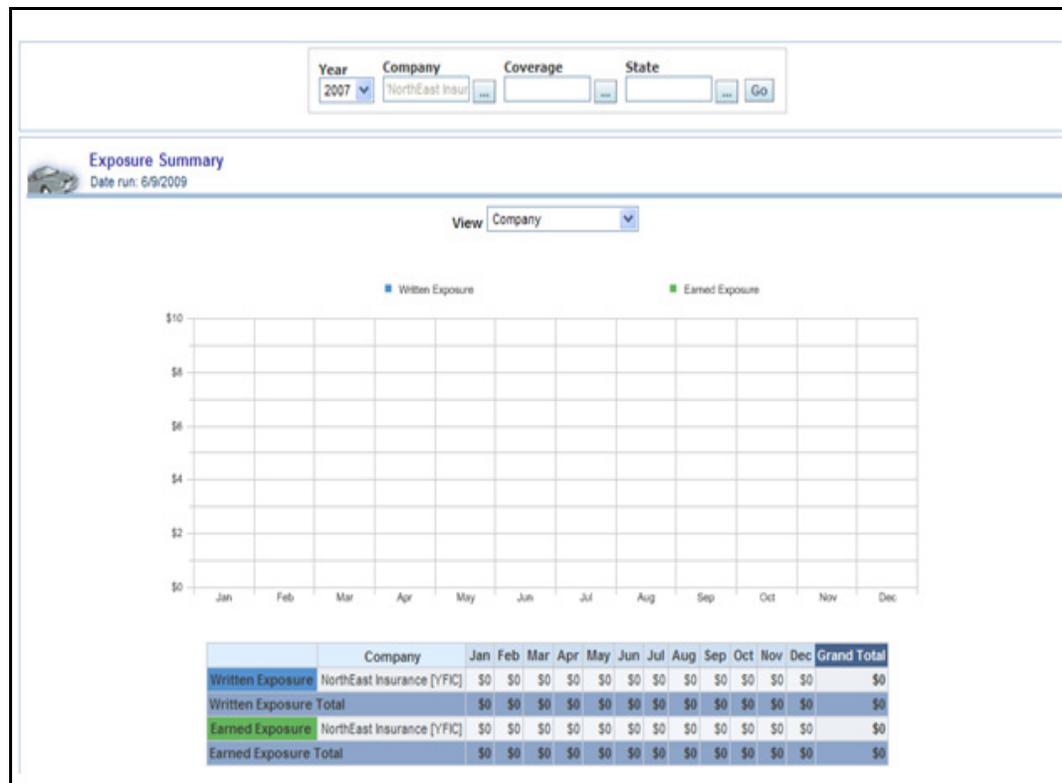


Figure 57: Exposure Summary (Personal Auto)

Loss Summary

The Loss Summary analysis shows a monthly breakdown of loss amounts and loss ratios for a specific year.

- Step 1:** Select a **Year** from the drop-down menu.
- Step 2:** Select the filters for the analysis from the appropriate choice list boxes:
 - a. **Company** – the name(s) of the company.
 - b. **Coverage** – the type(s) of coverage unique to this Line of Business.
 - c. **State** – the state or geopolitical area.
 - d. **New/Renewal** – the code indicating whether it is a New or Renewal policy.
 - e. **Currency Type** - the type of currency.
- Step 3:** Select the **Go** button. The results will appear on the lower half of the page.
- Step 4:** Select a **View** from the drop-down list to organize the data in the table. The available Views will be unique to the particular Line of Business you are using.

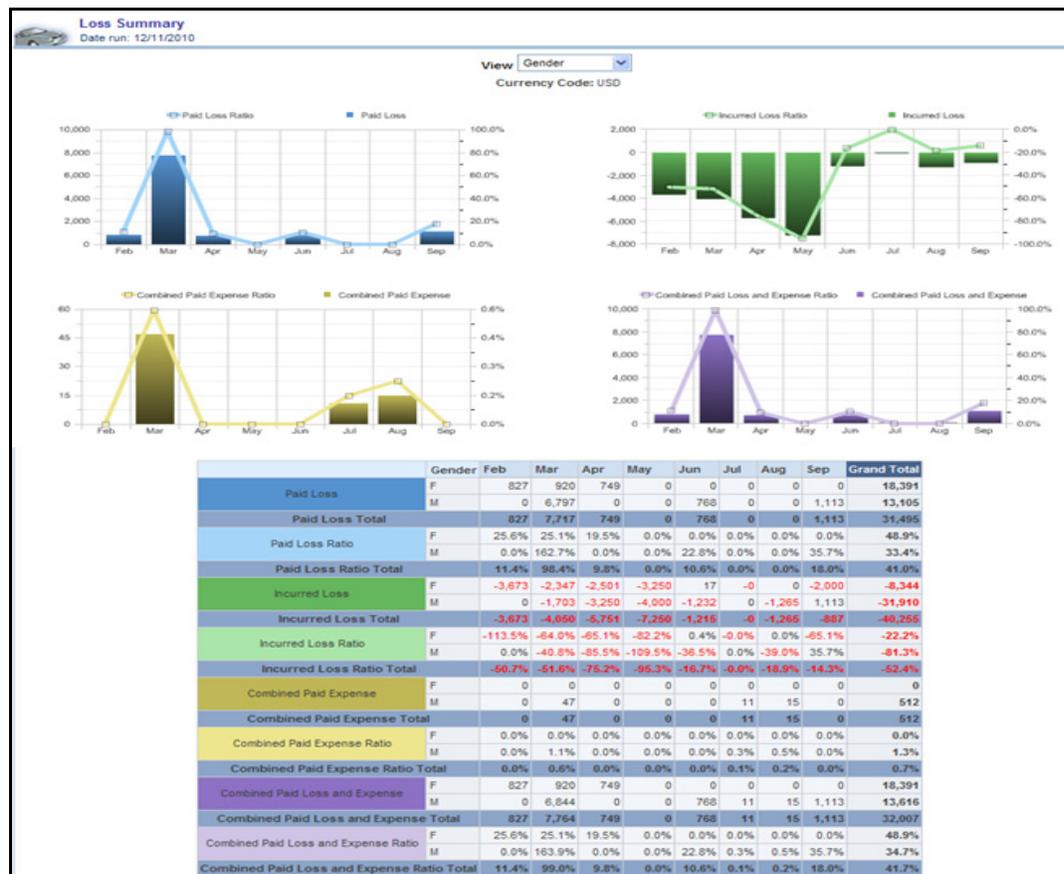


Figure 58: Loss Summary (Personal Auto)

Loss Triangulation

The Loss Triangulation analysis shows a quarterly breakdown of Paid Loss and Incurred Loss amounts and their totals for a specific year.

Step 1: Select a **Year** from the drop-down menu.

Step 2: Select the filters for the analysis from the appropriate choice list boxes:

- a. **Company** – the name(s) of the company.
- b. **Coverage** – the type(s) of coverage unique to this Line of Business.
- c. **State** – the state or geopolitical area.
- d. **New/Renewal** – the code indicating whether it is a New or Renewal policy.
- e. **Currency Type** - the type of currency.

Step 3: Select the **Go** button. The results will appear on the lower half of the page.



Figure 59: Loss Triangulation (Personal Auto)

Loss vs. Premium Summary

The Loss vs. Premium Summary analysis shows a monthly breakdown of incurred loss Ratio, Earned Premium amounts, Incurred Loss amounts and their totals for a specific year.

- Step 1:** Select a **Year** from the drop-down menu.
- Step 2:** Select the filters for the analysis from the appropriate choice list boxes:
- Company** – the name(s) of the company.
 - Coverage** – the type(s) of coverage unique to this Line of Business.
 - State** – the state or geopolitical area.
 - New/Renewal** – the code indicating whether it is a New or Renewal policy.
 - Currency Type** - the type of currency.
- Step 3:** Select the **Go** button. The results will appear on the lower half of the page.
- Step 4:** Select a **View** from the drop-down list to organize the data in the table. The available Views will be unique to the particular Line of Business you are using.



Figure 60: Loss vs. Premium Summary (Personal Auto)

Premium Summary

The Premium Summary analysis shows a monthly breakdown of written and earned premiums and their totals for a specific year.

- Step 1:** Select a **Year** from the drop-down menu.
- Step 2:** Select the filters for the analysis from the appropriate choice list boxes:
 - a. Company** – the name(s) of the company.
 - b. Coverage** – the type(s) of coverage unique to this Line of Business.
 - c. State** – the state or geopolitical area.
 - d. New/Renewal** – the code indicating whether it is a New or Renewal policy.
 - e. Currency Type** - the type of currency.
- Step 3:** Select the **Go** button. The results will appear on the lower half of the page.
- Step 4:** Select a **View** from the drop-down list to organize the data in the table. The available Views will be unique to the particular Line of Business you are using.

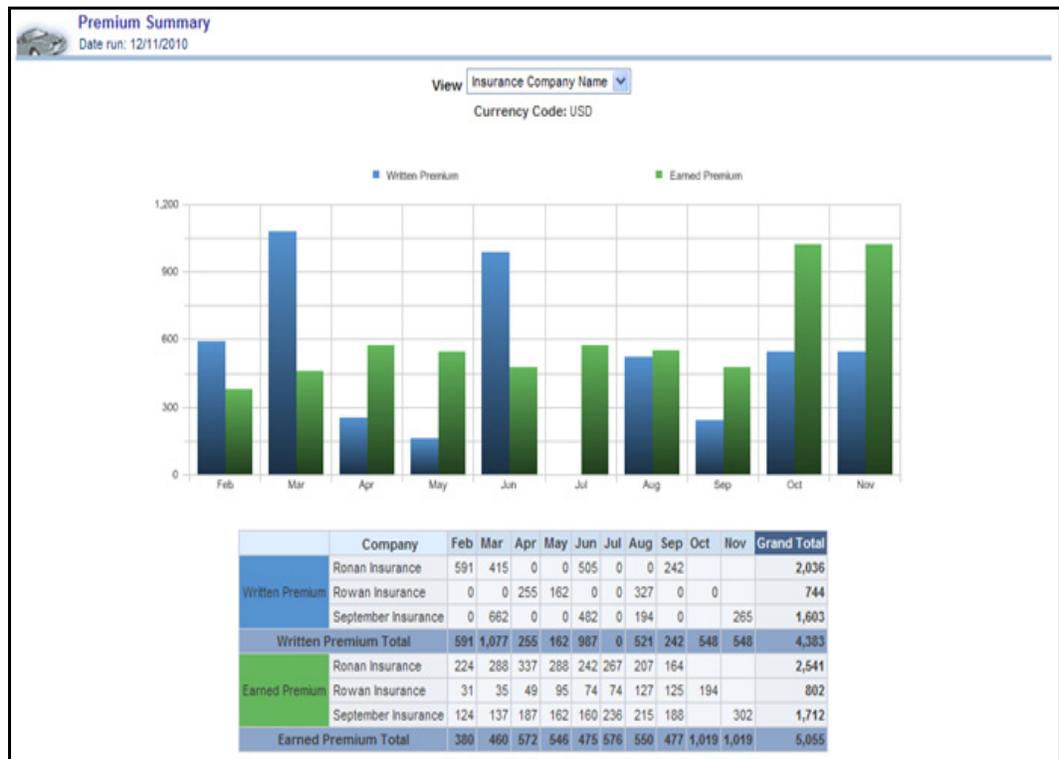


Figure 61: Premium Summary (Personal Auto)

Reserve Summary

The Reserve Summary analysis shows a monthly breakdown of the Outstanding Loss Reserve and Combined Outstanding Expense Reserve amounts and their totals for a specific year.

- Step 1:** Select a **Year** from the drop-down menu.
- Step 2:** Select the filters for the analysis from the appropriate choice list boxes:
- Company** – the name(s) of the company.
 - Coverage** – the type(s) of coverage unique to this Line of Business.
 - State** – the state or geopolitical area.
 - New/Renewal** – the code indicating whether it is a New or Renewal policy.
 - Currency Type** - the type of currency.
- Step 3:** Select the **Go** button. The results will appear on the lower half of the page.
- Step 4:** Select a **View** from the drop-down list to organize the data in the table. The available Views will be unique to the particular Line of Business you are using.

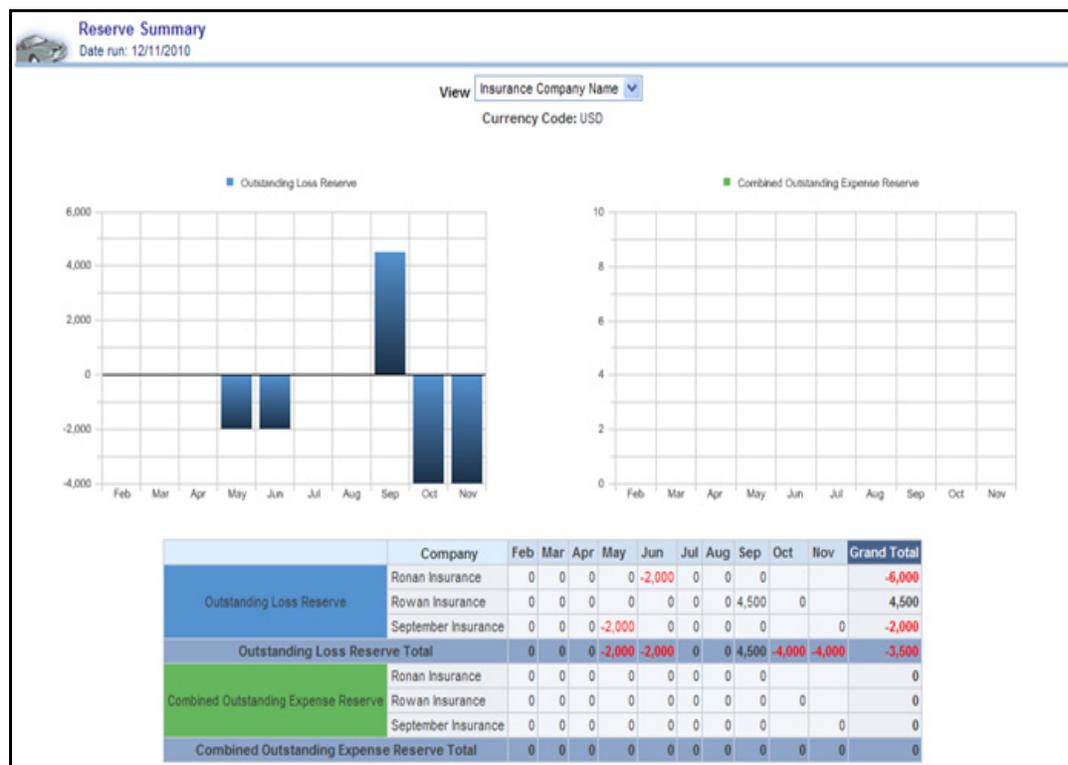


Figure 62: Reserve Summary (Personal Auto)

CORPORATE

This section describes how to setup and run the Analysis reports for the Corporate mart.

Average Premium per Policy

The Average Premium per Policy analysis shows the written premium, earned premium, policy count average written policy size, and average earned policy size across twelve months of a specific year.

- Step 1:** Select a **Year** from the drop-down menu.
- Step 2:** Select the filters for the analysis from the appropriate choice list boxes:
 - a. Line of Business** – the name(s) of the Line of Business.
 - b. Company** – the name(s) of the company.
 - c. Coverage** – the type(s) of coverage unique to this Line of Business.
 - d. State** – the state or geopolitical area.
 - e. New/Renewal** – the code indicating whether it is a New or Renewal policy.
- Step 3:** Select the **Go** button. The results will appear on the lower half of the page.

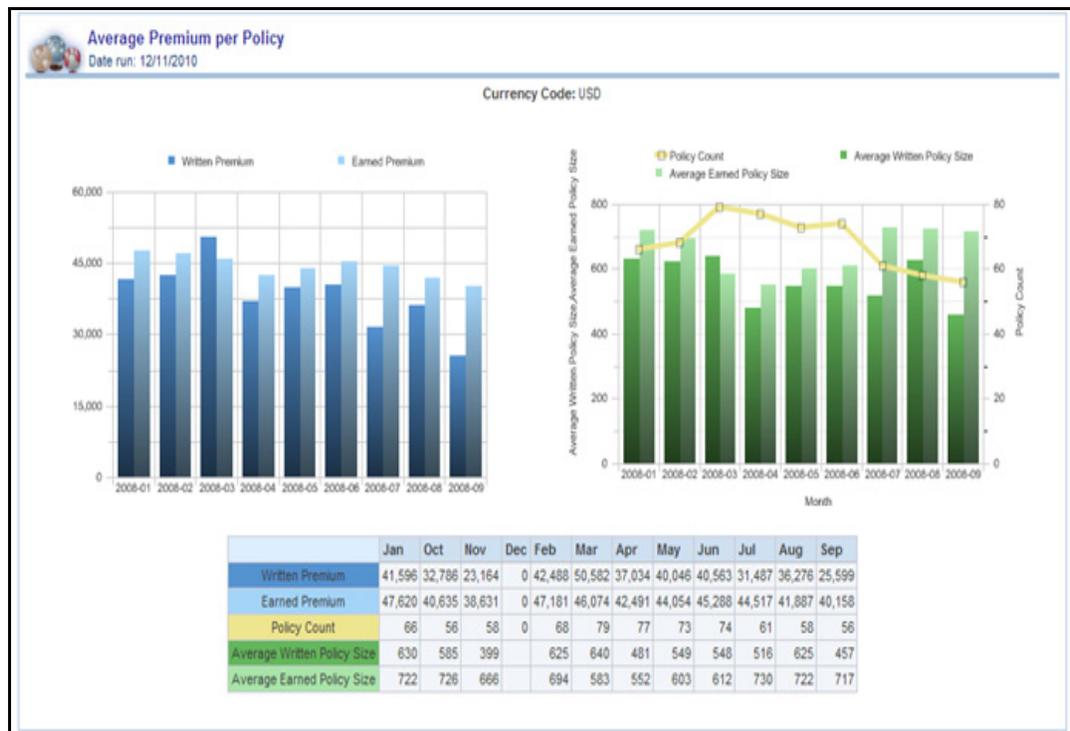


Figure 63: Average Premium per Policy (Corporate)

Loss Summary

The Loss Summary analysis shows a monthly breakdown of loss amounts and loss ratios for a specific year.

Step 1: Select a **Year** from the drop-down menu.

Step 2: Select the filters for the analysis from the appropriate choice list boxes:

- a. **Line of Business** – the name(s) of the Line of Business.
- b. **Company** – the name(s) of the company.
- c. **Coverage** – the type(s) of coverage unique to this Line of Business.
- d. **State** – the state or geopolitical area.
- e. **New/Renewal** – the code indicating whether it is a New or Renewal policy.

Step 3: Select the **Go** button. The results will appear on the lower half of the page.

Step 4: Select a **View** from the drop-down list to organize the data in the table. The available Views will be unique to the particular Line of Business you are using.

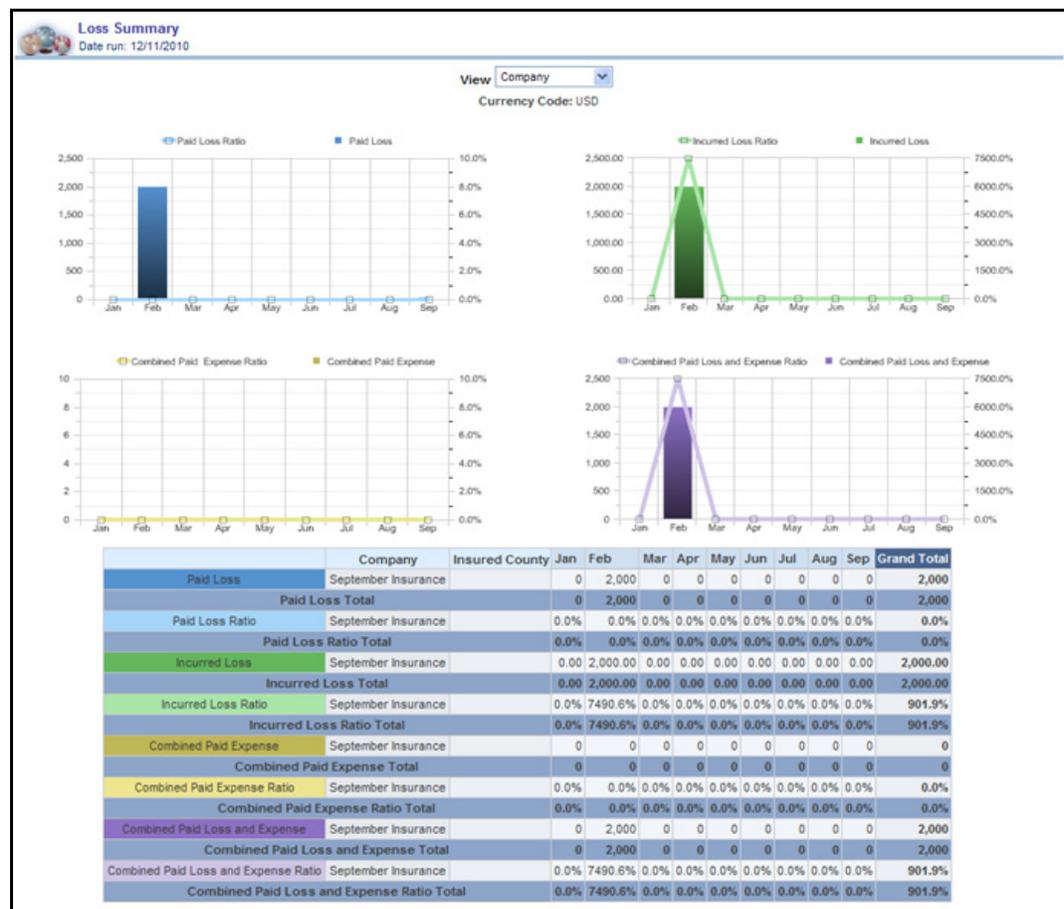


Figure 64: Loss Summary (Corporate)

Loss vs. Premium Summary

The Loss vs. Premium Summary analysis shows a monthly breakdown of incurred loss Ratio, Earned Premium amounts, Incurred Loss amounts and their totals for a specific year.

- Step 1:** Select a **Year** from the drop-down menu.
- Step 2:** Select the filters for the analysis from the appropriate choice list boxes:
 - a. Line of Business** – the name(s) of the Line of Business.
 - b. Company** – the name(s) of the company.
 - c. State** – the state or geopolitical area.
 - d. New/Renewal** – the code indicating whether it is a New or Renewal policy.
- Step 3:** Select the **Go** button. The results will appear on the lower half of the page.
- Step 4:** Select a **View** from the drop-down list to organize the data in the table. The available Views will be unique to the particular Line of Business you are using.



Figure 65: Loss vs. Premium Summary (Corporate)

Premium Summary

The Premium Summary analysis shows a monthly breakdown of written and earned premiums and their totals for a specific year.

- Step 1:** Select a **Year** from the drop-down menu.
- Step 2:** Select the filters for the analysis from the appropriate choice list boxes:
- Line of Business** – the name(s) of the Line of Business.
 - Company** – the name(s) of the company.
 - State** – the state or geopolitical area.
 - New/Renewal** – the code indicating whether it is a New or Renewal policy.
- Step 3:** Select the **Go** button. The results will appear on the lower half of the page.
- Step 4:** Select a **View** from the drop-down list to organize the data in the table. The available Views will be unique to the particular Line of Business you are using.

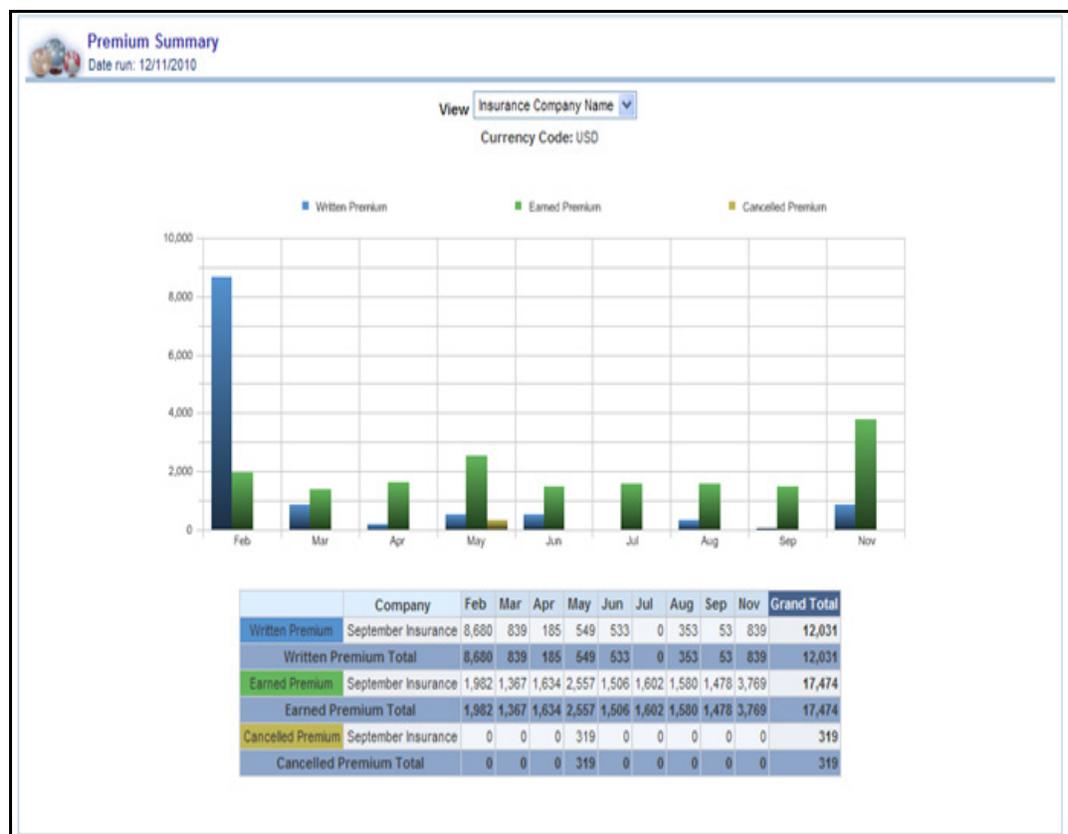


Figure 66: Premium Summary (Corporate)

Chapter 6

Reports Dashboard

The Reports Dashboard can be accessed by clicking on the Reports link on the menu at the top of the page. There are 24 reports spread over two tabbed pages: **Executive** and **Claims**. The reports appearing on these pages are the same for all roles and Lines of Business.

Executive Reports

The Executive reports are broken down into four subcategories:

- Business Indicator
- Executive Summary
- State Analysis
- New and Renewal Analysis



Figure 67: Executive Reports

Claims Reports

The claims reports are divided into the following categories:

- Claim Activity
- Claims by Adjuster
- Salvage and Subrogation Analysis
- Catastrophe and Reinsurance



Figure 68: Claims Reports

NAVIGATING THE REPORTS SCREEN

The OII reports will vary in content and look but they do have some common features in terms of inputting data and displaying results. Much of their functionality is the same as in the Scorecard and Analysis reports.

ENTERING INFORMATION AT THE REPORT PROMPTS

All of the reports require you to select filters from prompts at the top of the screen. Those reports that make comparisons between a current and prior time period also require you to select the time frame from a pull-down list. The number of prompts and required input depends upon the report.



Figure 69: Report Prompts

VIEWING THE REPORTS

The OII reports share the following common features.

Report Layout

All reports display results in a table format. The layout of these tables will be different depending upon which report you are viewing.

The exception is the New and Renewal Business Summary report on the Claims page which also displays the results in graphs.



Figure 70: New and Renewal Business Summary Report

Color Coded Report Columns

Reports that perform comparisons between current and previous time periods or new and renewal business use different colored columns to provide quick interpretation. The Business Indicator by Month report shown below shows the **Current Month** section of the report in green, the **Previous Month** in blue, and the **%Change** in yellow.

Business Indicator by Month
Date run: 12/11/2010

View
Currency Code: USD

Company name	Current Month					Previous Month					% Change					
	Average New Written Premium	New Written Policy Count	Average Inforce Premium	Retained %	Cancelled / Non-Renewed %	Average New Written Premium	New Written Policy Count	Average Inforce Premium	Retained %	Cancelled / Non-Renewed %	Average New Written Premium	New Written Policy Count	Average Inforce Premium	Retained %	Cancelled / Non-Renewed %	
Rowan Insurance		0	125				0	164								-23.9%
September Insurance		0	53				0	118								-55.0%
Tobias Insurance		0	59				0	57								3.5%

Figure 71: Business Indicator by Month Report

A similar color scheme is used in the New and Renewal Experience report to distinguish between the New Business and Renewal Business portions of the report.

New and Renewal Experience
Date run: 12/11/2010

New Business Renewal Business
Currency Code: USD

Company name	Line of Business	New Business				Renewal Business					
		Written Premium	Written Premium Policy Count	Average Written Premium	Claims Opened	Incurred Loss Ratio	Written Premium	Written Premium Policy Count	Average Written Premium	Claims Opened	Incurred Loss Ratio
September Insurance	AUTOCC	0	0		0	0.0%	242	3	81	0	0.0%
	DFRE			0	0		949	11	86	0	0.0%
	HOME			0	0		84	5	17	0	0.0%
	PA	0	0		0	0.0%	1,803	11	146	0	0.0%
	PROPC			0	0		8,680	4	2,170	0	0.0%
	UMBRP			0	0		473	9	53	0	0.0%

[Modify](#)

Figure 72: New and Renewal Experience Report

Sort Results by Different Views

Certain reports allow the user to sort the results by specific View categories selected from drop-down lists. When a new View item is selected the screen will automatically refresh to display the results by that item.

Company and State Summary YTD
Date run: 12/11/2010
Currency Code: USD

View: Company

Company name	Year	Written Premium	Earned Premium	Paid Loss	Loss Ch	Inced Loss and Inse Incurred	Incurred Loss Ratio	Combined Loss and Expense Incurred Ratio
Rowan Insurance	2008	498	890	1,113		1,113	125.1%	125.1%
September Insurance	2008	53	1,478	0	0	0	0.0%	0.0%
Grand Total		551	2,367	1,113	4,500	1,113	47.0%	47.0%

Figure 73: Sort Results by View

Drill Down Capabilities

Certain reports allow you to drill down on data by selecting either an item in a table or a column title. For example, the Executive Summary YTD report allows you to drill down on the year to view the data by quarter.

Executive Summary YTD
Date run: 12/11/2010
Currency Code: USD

View: Company

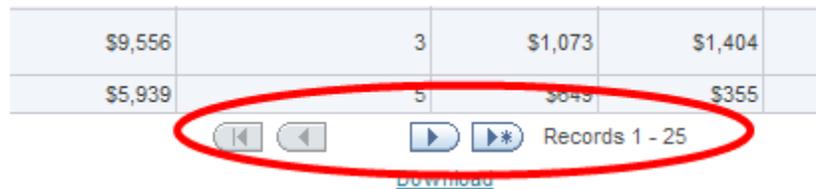
Year	Company name	Written Premium	Earned Premium	Paid Loss	Loss Reserve Change	Incurred Loss	Incurred Loss Ratio	Combined Incurred Expense	Combin Expen
2008	Rowan Insurance	498	890	1,113	4,500	1,113	125.1%	0	
	September Insurance	53	1,478	0	0	0	0.0%	0	
Grand Total		551	2,367	1,113	4,500	1,113	47.0%	0	

Year	Fiscal Quarter Name	Company name	Written Premium	Earned Premium	Paid Loss	Loss Reserve Change	Incurred Loss	Incurred Loss Ratio	Combined Incurred Expense	Co Ex
2008	Q3	Rowan Insurance	498	890	1,113	4,500	1,113	125.1%	0	
		September Insurance	53	1,478	0	0	0	0.0%	0	
Grand Total			551	2,367	1,113	4,500	1,113	47.0%	0	

Figure 74: Drill Down on Year

Navigating a Report

Reports that span multiple pages will have navigation buttons on the bottom of the page to allow you to move through the report.



The image shows a table with two rows of data. The first row contains values: \$9,556, 3, \$1,073, and \$1,404. The second row contains values: \$5,939, 5, \$849, and \$355. Below the table, there are navigation buttons: a double left arrow, a single left arrow, a single right arrow, and a double right arrow. To the right of these buttons is the text "Records 1 - 25". A red oval highlights the navigation buttons and the "Records 1 - 25" text. Below the navigation buttons is a blue "Download" link.

\$9,556	3	\$1,073	\$1,404
\$5,939	5	\$849	\$355

Figure 75: Navigate a Report

Downloading a Report

The **Download** link at the bottom of a report page allows you to easily open or save the report in several different formats.

When you click on the **Download** link a menu will appear containing the formats.

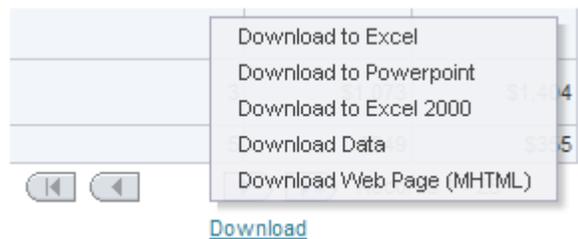


Figure 76: Download Report Menu

The formats in this menu are:

- **Download to Excel** – Saves the report to an Excel spreadsheet.
- **Download to PowerPoint** – Saves the report to a PowerPoint slide.
- **Download to Excel 2000** – Save the report to an Excel 2000 spreadsheet.
- **Download Data** – Saves the report to a .csv format.
- **Download Web Page (MHTML)** – Saves the report as a web page in a MHTML format.

To download a report:

1. Click on the **Download** link. The **Download** menu will open.
2. Click on the format that you wish to use. A **File Download** dialog box will open:

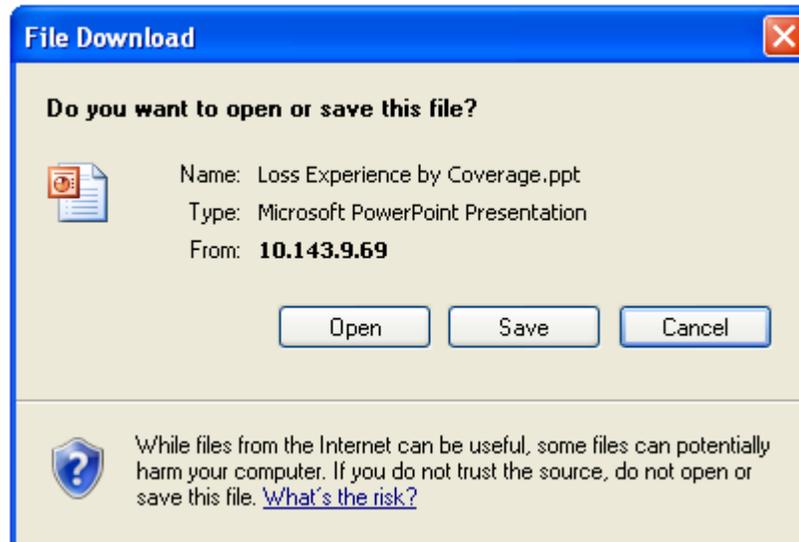


Figure 77: File Download Dialog Box

3. Click the **Save** button. A **Save As** dialog box will open:

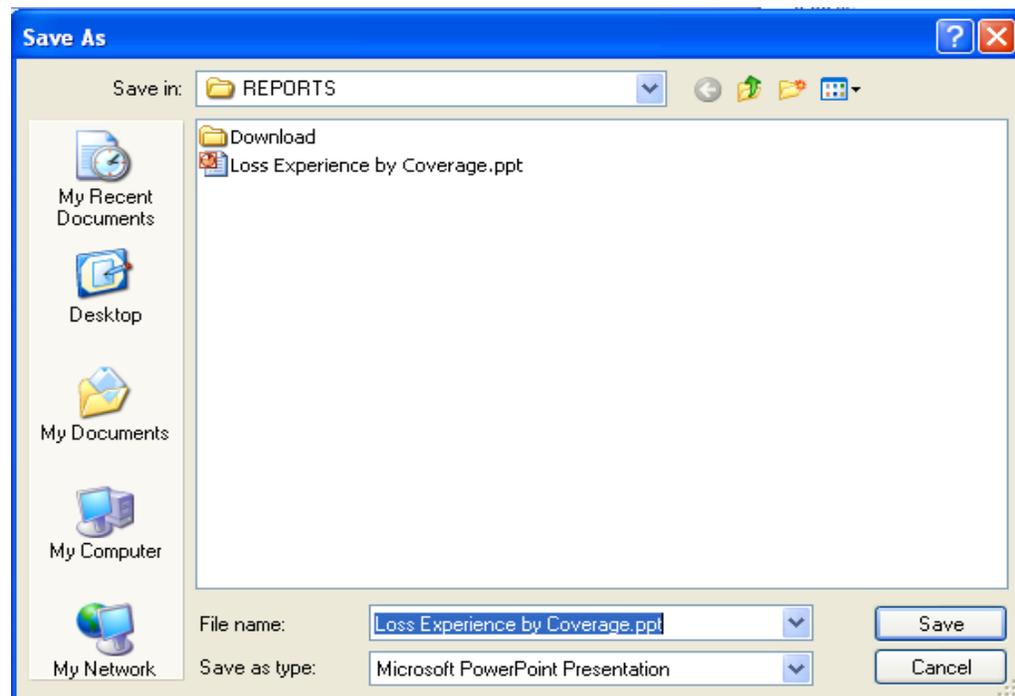


Figure 78: Save As Dialog Box

4. Navigate to the destination where you want to save the report and select the **Save** button.

If you wish to open the report to see what it looks like you could have selected the **Open** button in step 2. The report would have open in the appropriate application for the selected format. For example, a report saved in PowerPoint would look like this:

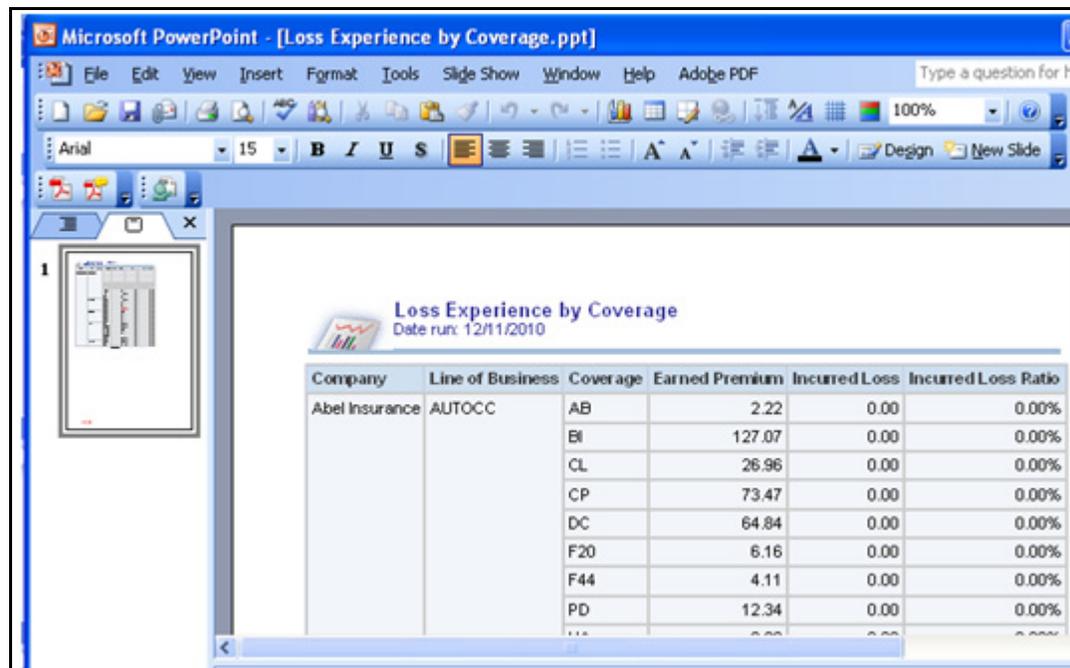


Figure 79: A Report Saved in PowerPoint

USING THE EXECUTIVE REPORTS

This section describes each of the reports on the Executive tab by category.

BUSINESS INDICATOR REPORTS

The Business Indicator reports allow users to compare and measure changes in key statistics between current and prior month, quarter, or year time periods.

Business Indicator by Month

Description: This report determines the trend of **Current Month** statistics for significant business indicators measuring size and growth of a book of business.

Purpose: This report provides Underwriting, Marketing, Agency and Product Managers with the ability to compare and measure New Business, In Force and Retention statistics for current and previous time periods.

Business Indicator by Quarter

Description: This report determines the trend of **Current Quarter** statistics for significant business indicators measuring size and growth of a book of business.

Purpose: This report provides Underwriting, Marketing, Agency and Product Managers with the ability to compare and measure New Business, In Force and Retention statistics for current and previous time periods.

Business Indicator by Year

Description: This report determines the trend of **Current Year** statistics for significant business indicators measuring size and growth of a book of business using this report.

Purpose: This report provides Underwriting, Marketing, Agency and Product Managers with the ability to compare and measure New Business, In Force and Retention statistics for current and previous time periods.

EXECUTIVE SUMMARY REPORTS

Company and Line of Business Summary

Description: This report provides a summary of premiums and losses for each company and line of business during the current month of the calendar year.

Purpose: This report allows executive to compare results by company and line of business for each month.

Company and State Summary YTD

Description: This report provides a summary of premiums and losses for each company and exposure state for each month to date of the calendar year.

Purpose: The report allows executives to compare results by company for each exposure state, which are trended to show YTD results.

Executive Summary YTD

Description: This report provides an in depth review of Premium and Loss information formatted to easily show YTD results by trending monthly information of premiums and losses by Company and Line of Business.

Purpose: This report helps Executives and Production Personnel identify potential trends by grouping monthly data, allowing easy evaluation of trends and patterns and quick identification of exceptional data.

Loss Experience by Coverage

Description: This report analyzes Premium and Exposure metrics and the impact of catastrophe losses as well as standard loss severity, frequency, rate indications and loss ratios by coverage.

Purpose: This report provides Underwriting, Agency and Product Managers with the ability to analyze Premium, Exposure, Loss and Catastrophe Loss, Severity, Frequency and Loss Ratio Statistics by Coverage Attributes.

STATE ANALYSIS REPORTS

Governing State Analysis YTD

Description: This report provides a summary of premiums, losses and policy activity for all commercial lines. Data is provided for each company and governing state aggregated each month of the calendar year.

Purpose: This report allows Executives and Management to compare results by company for each governing state, which are broken down by each Commercial Line of Business to show YTD results. New and Renewal Business can be compared to total premium amounts.

Line of Business by State

Description: This report analyzes changes in Premium and Incurred Loss metrics between a specified current and prior month period by state.

Purpose: This report provides Executives a summary of premiums and losses in the current period compared to the prior period.

NEW AND RENEWAL ANALYSIS REPORTS

New and Renewal Business Summary

Description: This report provides a time comparison and distribution of new, renewed and total policy premium amounts. These business metrics show the relationship between new, renewed and total book of business statistics.

Purpose: Underwriting, Marketing, and Product Managers can analyze new and renewal business and its distribution across a variety of dimensions will allow for a better comparison of the changes occurring in new business as it is written.

New and Renewal Experience

Description: This report provides a comparison of new and renewal business distribution and new and renewal policy premium amounts. These business metrics show the relationship between new and renewal book of business statistics.

Purpose: Underwriting, Marketing, and Product Managers can analyze new and renewal business and its average premium and policy counts across a variety of dimensions will allow for a better comparison of the changes occurring in new and renewal business as it is written.

New Business Experience

Description: This report provides a comparison of New and Retained Business Premium and Policy Count during the reporting period compared to the prior period.

Purpose: The report identifies the source of current premiums between New Business and Retained Business. It identifies potential areas for correction in either Marketing or Underwriting, if targeted goals or account size are not achieved.

New Business Premium Comparison

Description: This report provides a comparison between new and inforce policy counts and average premium size for current and previous time periods. These new business metrics show specific changes in information for monitoring and managing new business during two time periods.

Purpose: An analysis of new business will allow better decisions: on the type of business being bound, the acceptability of the volume of new business, and average premium levels for the new business group.

Renewal Business Experience

Description: This report measures renewal information by producer to provide an analysis of renewal business across all lines of business.

Purpose: This report will provide Production and Executive Staff with renewal information by producer to evaluate renewal business compared to all lines of business.

USING THE CLAIMS REPORTS

CLAIM ACTIVITY REPORTS

Claim Activity for All Producers

Description: Provides a detailed report of Allocated Loss Adjustment Expenses on claims.

Purpose: A comprehensive analysis of activity for all producers will allow better decisions: on the type of business being bound, the acceptability of the volume of new business, and average premium levels for the new business group.

Open Claims

Description: This report provides a detailed listing of open claims within the specified period broken down by company, adjuster name and number, and Line of Business.

Purpose: The Claims Staff will have an analysis of staffing and workload requirements to assure claims' performance measurements are achieved.

Producer Claim Activity

Description: This report provides a detailed listing of claim activity for Producers within the specified period.

Purpose: The Claims Staff can analyze claim activity for different Producers. Claim strategies can be developed to assure objectives are being met at the Producer level.

Producer Closed Claim Activity

Description: This report provides a detailed listing of closed claim activity for Producers within the specified period and an analysis of closed claim activity for different Producers.

Purpose: The Claims Staff can develop claim strategies can be developed to assure objectives are being met at the Producer level.

CLAIMS BY ADJUSTER REPORTS

Claim Feature by Adjuster

Description: This report provides a detailed listing of claims within a specified period.

Purpose: The Claims Staff can use the report to determine staffing and workload requirements in order to assure claims' performance measurements are achieved.

Claims in Litigation by Adjuster

Description: This report provides claims currently in litigation to identify, monitor, and manage litigation expenses.

Purpose: Claim Executives can analyze litigated claims to identify, monitor, and manage litigation expenses. Claim strategies can be developed to assure the cost effectiveness of litigating claims by measuring the cost of defending lawsuits in comparison to the Loss Reserves.

SALVAGE AND SUBROGATION ANALYSIS REPORTS

Claims in Salvage Summary

Description: This report provides claims involving salvage to identify, monitor, and manage salvage recovery.

Purpose: Claims Staff can analyze salvage claims to identify, monitor, and manage recovery. Claim strategies can be developed to assure the recovery rates are established and recognized within total incurred losses. These recoveries impact loss costs analysis and establishing proper rates.

Claims in Subrogation Summary

Description: This report provides claims that involving Subrogation to identify monitor and manage subrogation recovery.

Purpose: Claims Staff can analyze subrogation claims to identify, monitor, and manage recovery. Claim strategies can be developed to assure the recovery rates are established and recognized within total incurred losses. These recoveries impact loss costs analysis and establishing proper rates.

CATASTROPHE AND REINSURANCE REPORTS

Catastrophe Claims

Description: The report is used to monitor potential reinsurance recoveries, the number of needed claims adjusters and their locations. It is an analysis of claim costs attributable to an identified catastrophe.

Purpose: This report provides Underwriting, Financial, and Claims Executives with the costs related to losses resulting from an identified catastrophe.

REINCO Exposure by Agent

Description: This report provides a listing of claims that are recoverable from the appropriate reinsurance company based upon the treaty arrangement.

Purpose: This report provides Claims and the Financial Staff with a detailed listing of ceded claims within the specified period.

Chapter 7

Answers

Answers is an ad hoc query tool that allows you to query the data in OII. The Answers page of the OII has been configured to allow you to create your own reports, or *requests*, using the metrics and filters delivered with OII. This chapter will describe the Answers interface as it applies to the OII data and walk you through the steps to create your own requests.

This chapter will not cover all of the functionality available in the Answers. For a comprehensive description of Answers, please refer to the *Oracle® Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide* for version 10.1.3.4.

To access Answers, click the **Answers** link on the menu on the right side of the page. The Answers start page will open. This page is divided into two selections or panes:

- **Selection Pane** – The selection pane on the left side of the screen contains the Presentation Catalog and Dashboard tabs.
- **Workspace** – The workspace contains the subject areas for OII. Each Insight mart name is an active link. When you click on a mart the screen changes to display the metrics and filters for the selected mart. You can use these items to build requests

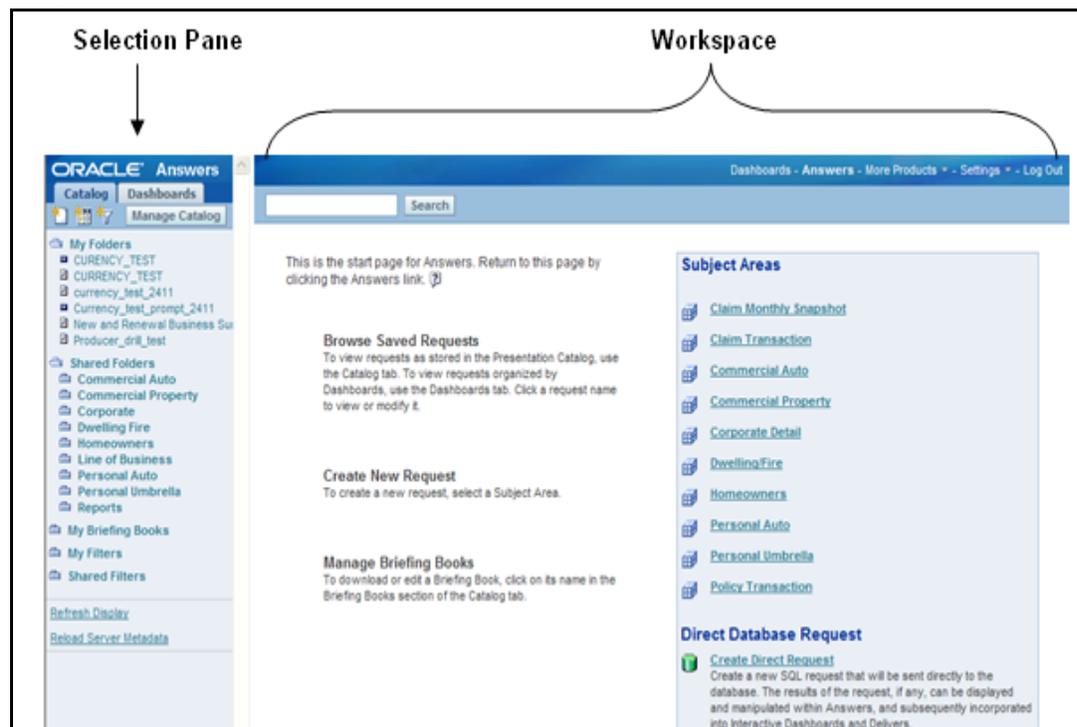


Figure 80: Answers Landing Page

SELECTION PANE OVERVIEW

The selection pane contains tabs and buttons for accessing and managing dashboards. It also contains the shared folders which collectively make up the Presentation Catalog. All content created in Answers, including requests and filters, can be organized and stored in the Presentation Catalog.

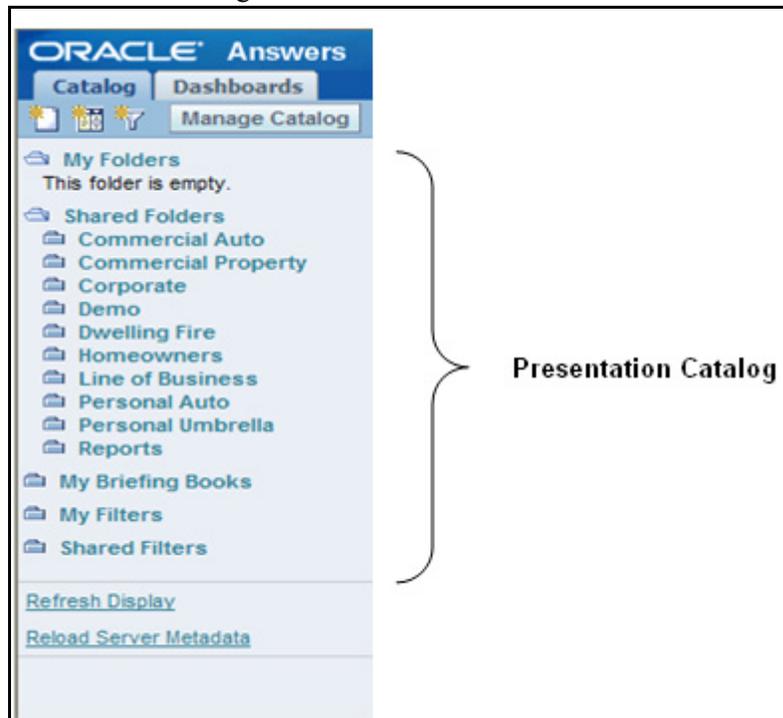


Figure 81: Selection Pane Tabs

The following pages provide a brief description of the tabs, buttons, links, and contents of the Selection Pane.

SELECTION PANE TABS

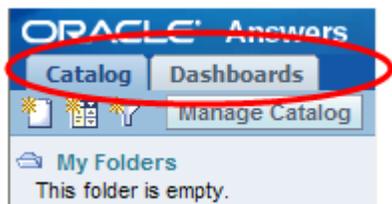


Table 6: Selection Pane Tabs

Tab	Description
Catalog	The Catalog tab shows the contents of the Presentation Catalog which contains the My Folders, Shared Folders, My Briefing Books, My Filters, and Shared Filters.
Dashboards	<p>The Dashboards tab shows the contents of all saved dashboard pages in OBIEE. The contents of a dashboard, including such dashboard objects as pages and prompts, can be constructed in the Dashboard Editor and saved to folders here.</p> <p>Dashboard creation and modification is reserved for OBIEE administrators or users with administrative permissions. An in depth description of this topic is beyond the scope of this manual.</p> <p>For a complete description of Dashboard editing, refer to the <i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4</i>.</p>

SELECTION PANE BUTTONS

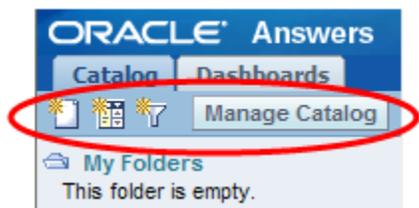


Table 7: Selection Pane Buttons

Buttons	Description
	The New Request button allows you to create a new request. When you select it a drop-down list of marts in the Subject Areas will appear. Select the mart and you will be transferred to the Criteria tab where you can select the columns and filters to build your request.

Table 7: Selection Pane Buttons (Continued)

Buttons	Description
	<p>The New Dashboard Prompt button allows you to construct the dashboard prompts for a report. Dashboard prompts serve to filter all requests embedded in a dashboard or requests on certain dashboard pages only.</p> <p>When you select this button, a drop-down list of marts from the Subject Areas will appear. Once you select a mart from the list you will be transferred to the Dashboard Prompt work area where you can select the Oracle Insurance filters that will make up your prompt. Dashboard prompts can be saved to the Dashboards tabs where they can be retrieved for use in future reports.</p> <div data-bbox="664 556 1404 657" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p>Month Reinsurance Company Line of Business</p> <p>2009-06 <input type="text"/> <input type="text"/> <input type="button" value="Go"/></p> </div> <p>For a complete description of how to construct a dashboard prompt, refer to the <i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4</i>.</p>
	<p>The New Saved Filter button allows you to create and save filters which you can then insert into requests. When you select this button, a drop-down list of marts from the Subject Areas will appear. Once you select a mart from the list you will be transferred to the Saved Filter work area where you can select the OII filters to build your saved filter.</p> <p>Saved Filter</p> <p>Create a filter for the current Subject Area. Click on a column from the this new filter.</p> <div data-bbox="651 1056 1369 1234" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p>Calendar Year is equal to / is in @_{PACalYear}{2005} <input type="button" value="X"/></p> <p>AND Company is prompted <input type="button" value="X"/></p> <p>AND Coverage is prompted <input type="button" value="X"/></p> <p>AND Geopolitical State Name is prompted <input type="button" value="X"/></p> </div> <p>For a complete description of how to construct a saved filter, refer to the <i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4</i>.</p>
	<p>The Manage Catalog button contains features to edit, rename, set permissions for, and delete folders and items within them. This button is only available for Administrators and users with the appropriate permissions.</p> <p>For a complete description of how to use the features provided through this button, refer to the <i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4</i>.</p>

PRESENTATION CATALOG FOLDERS

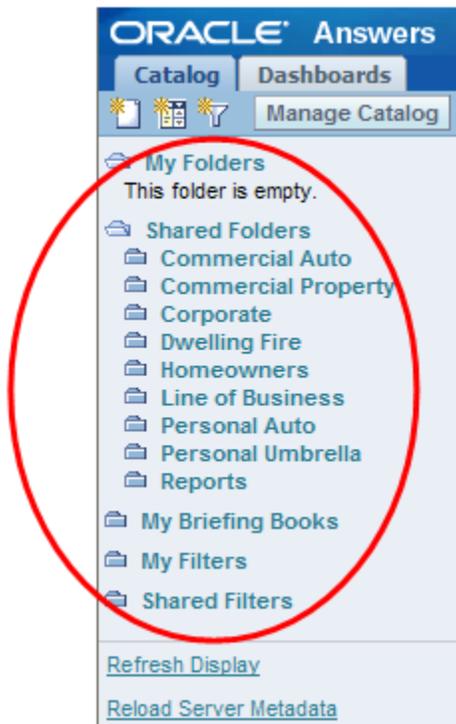


Table 8: Presentation Catalog Folders

Folder	Description
My Folders	This is a personal folder where you can save the requests that you build. If you save a request in My Folders it will only be available to you on your personal dashboard.
Shared Folders	Any requests that are saved in the Shared Folders will be available to all users.
My Briefing Books	This is a licensed area that allows you to store a static snapshot of dashboard pages or individual requests. For a comprehensive explanation of the Briefing Books feature, refer to the <i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4</i> .
My Filters	This is a personal folder where you can save custom built filters for your future requests. As with My Folders, any filter saved in this folder will only be available to you.
Shared Filters	This folder contains custom built filters for use by all available users.

SELECTION PANE LINKS



Table 9: Selection Pane Links

Link	Description
Refresh Display	Refreshes the information for saved requests, filters, briefing books, and dashboard content.
Reload Server Metadata	Refreshes the view of the OBIEE Server metadata for subject areas.

ACCESSING THE SUBJECT AREAS

The Subject Areas list on the Answers landing page lists the names of all of the OII marts. Each mart is a set of "Query Ready" tables designed to support specific analytical requirements. Marts contain fact (metric) and dimension (filter) tables.

Each mart name in the Subject Area list is an active link that lets you access the filters and metrics belonging to that specific mart. You can use these items to build, run, and customize requests.

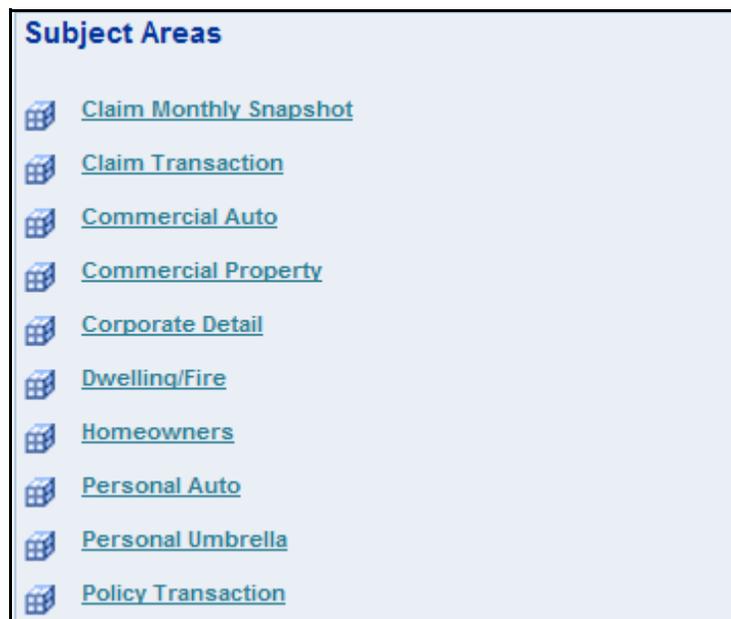


Figure 82: Subject Areas

Note If you are logged in with administrative privileges you will see an area directly beneath the Subject Areas list called *Direct Database Request*. This feature allows users to issue direct database requests directly to a physical back-end database.

The discussion of direct database requests is beyond the scope of this manual. For a comprehensive description of this feature refer to the *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4*.

To Access a Subject Area:

- Click on  in the Selection Pane or,
- Click on a mart name link in the Subject Areas list. A page similar to the one below will open.

PARTS OF THE SUBJECT AREA

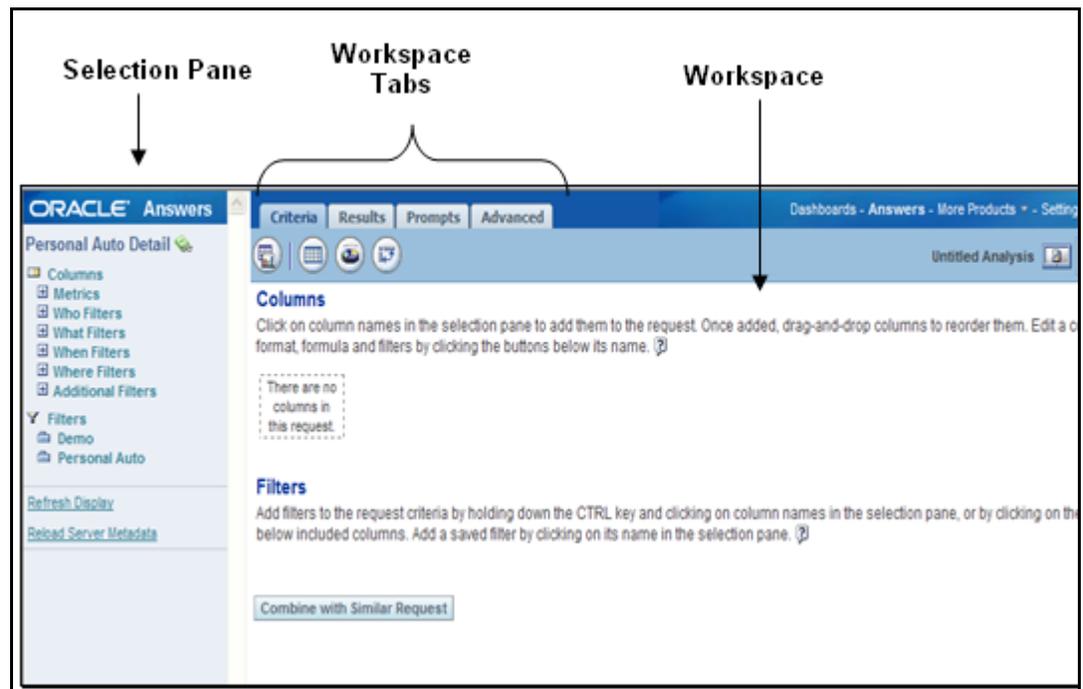


Figure 83: Parts of the Subject Area

The layout of the subject area is the same for all marts.

- **Selection Pane** – the selection pane on the left contains two folders:
 - *Columns* – this folder contains a complete list of metrics and filters for the selected mart that you can use to build your requests.
 - *Filters* – this folder contains filter sets unique to the selected mart that you can use to build customized filters.
- **Workspace** – the workspace area on the right is where you will build your requests. It is empty when you first arrive. It is comprised of two sections:
 - *Columns* – this is the workspace where you build your requests using metrics and filters from the Column section in the selection pane.
 - *Filters* – this is the workspace area where you can build customized filters using the filter sets from the Filters section in the selection pane. These filters can be saved and included in future requests.

SUBJECT AREA SELECTION PANE OVERVIEW

COLUMNS FOLDER

The Columns folder lists the metrics and filters associated with the selected mart. These elements are selected to construct requests within OIL. To see a description of a specific metric or filter, simply move the cursor over the item and a floating definition box will appear.

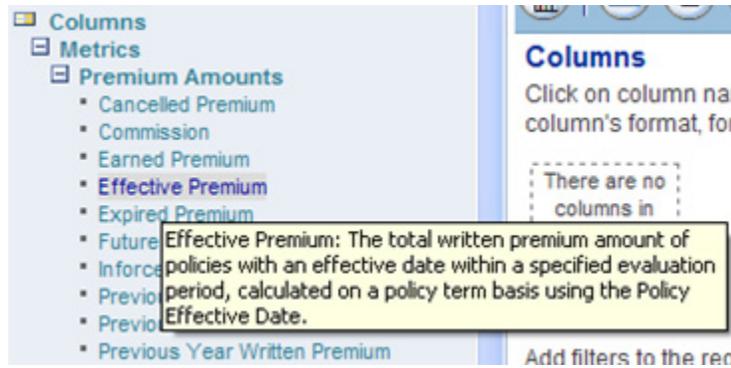


Figure 84: Move Cursor over Metric or Filter to Display Description

- **Metrics** – Metrics represent calculated values, including premiums, losses, exposures, ratios, averages and counts. Individual metrics are organized by these categories within the list.

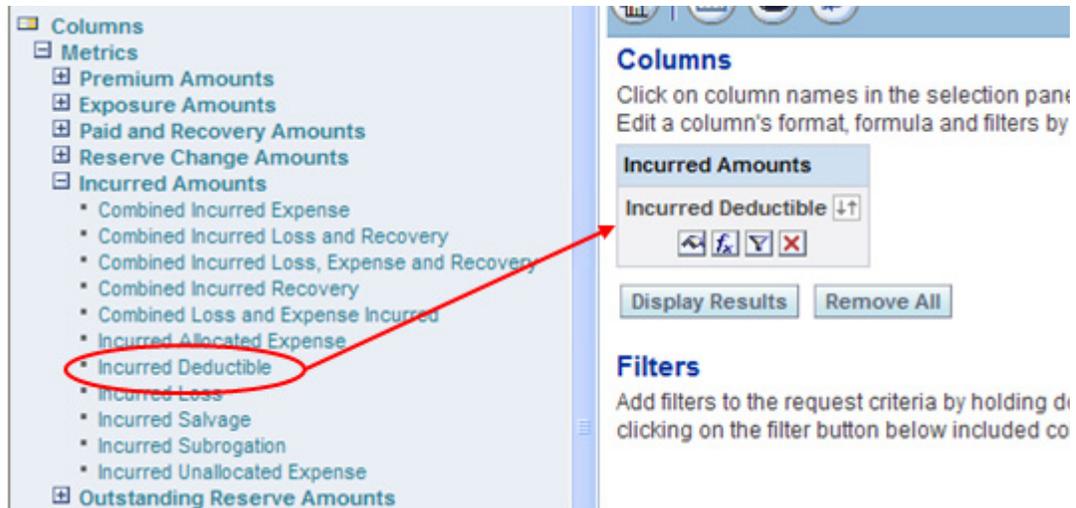


Figure 85: List of Metric Categories

- **Filters** – Filters represent elements by which the metrics can be analyzed, such as by line of business, agency, program, adjuster, class code and postal code. The filters reduce the data into specific categories and time ranges.



Figure 86: List of Filter Categories

Filters are organized in a Who, What, When, Where format to facilitate ease of navigation.

- **WHO** – Represents selections for individual companies, branch offices, underwriters, and agents.
- **WHAT** – Represents selections for individual lines of business, or line of business attributes, depending on the analysis category.
- **WHEN** – Which time frame is applicable to the analysis? A valuation period is selected by opening the When filter and selecting the period of time that will be used to analyze the data. The valuation period can be a single month, a quarter, year-to-date by month, several consecutive or nonconsecutive months, several quarters, several years, or any of the other choices listed under the When filter category.
- **WHERE** – Represents selections for specific states, territories, or postal codes depending on the analysis category, if specific geographic areas are being targeted.
- **ADDITIONAL FILTERS** – Represent selections for filtering on new/renewal, active/cancelled, or direct, ceded, and assumed business depending on the analysis category.

FILTERS FOLDER

The Filters folder contains sets of common, pre-configured saved filters for the current mart. These filters are provided to you so that you may add them to a request and edit them as you see fit.

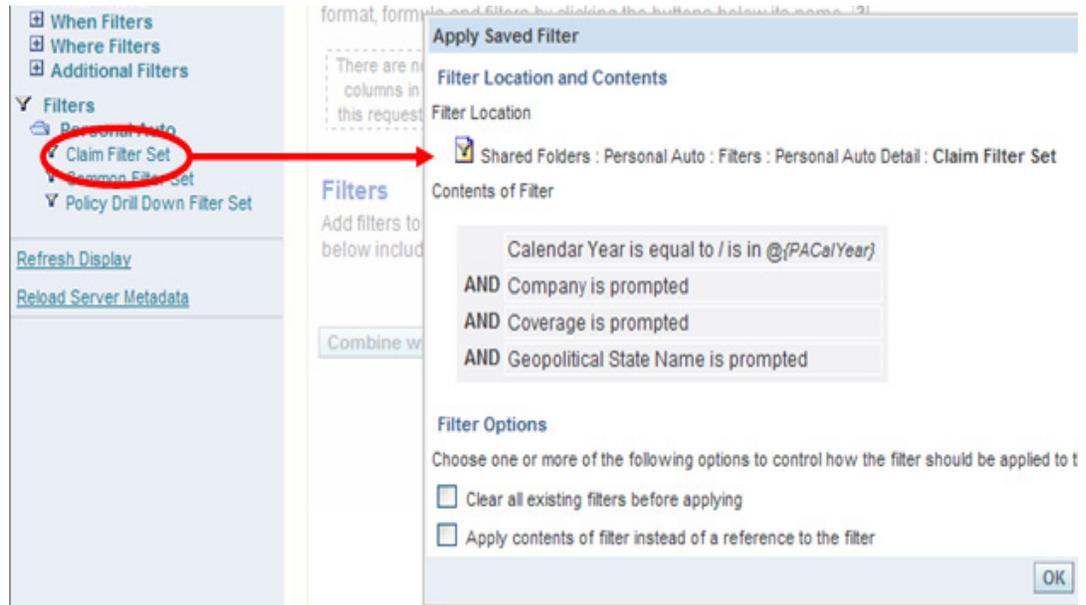


Figure 87: Claim Filter Set

USING THE OBIEE METADATA DICTIONARY

The green icon next to the title of the mart in at the top of the selection pane opens a metadata dictionary in a separate browser window showing multiple contents items and levels for the OII database.

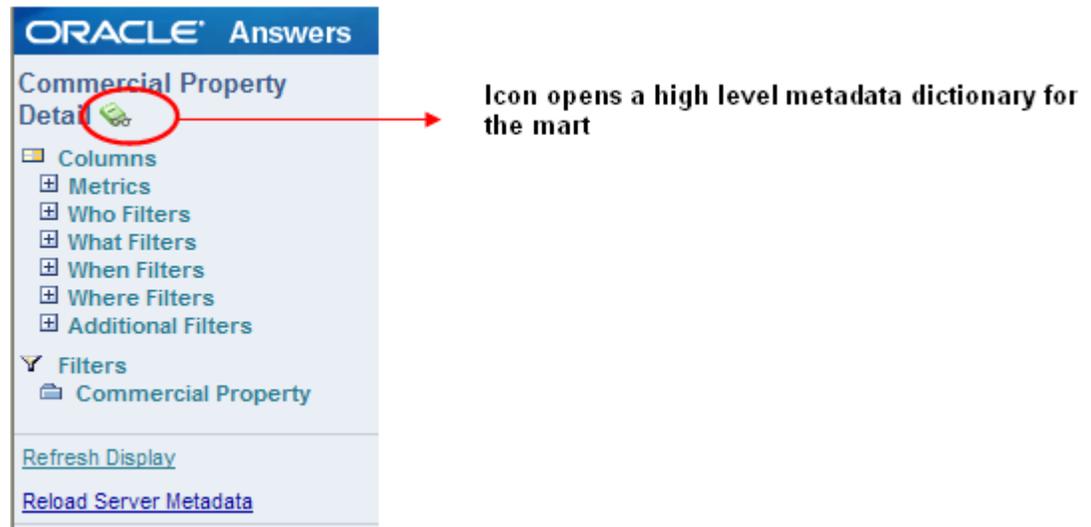


Figure 88: OII Metadata Dictionary Icon

Users can view data at different levels in the dictionary by moving the cursor over a specific category, sub-category, or individual metric or filter in the selection pane. For example, if you scroll over the “Who Filters” category name, the metadata dictionary icon appears to the right of the name. Click on it to open the dictionary and view the data for the Who filters.

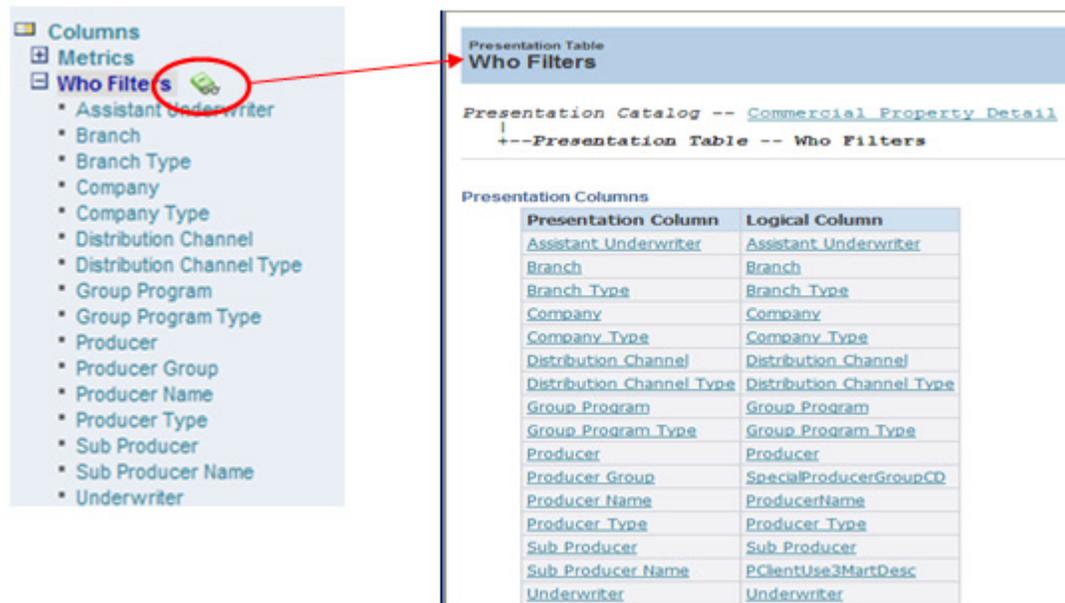


Figure 89: Viewing Metadata Dictionary Data at Different Levels

SUBJECT AREA WORKSPACE OVERVIEW

The workspace of the subject area for a selected mart is where you can request your OII requests. This section provides a brief description of the tabs and buttons found in this area.

SUBJECT AREA WORKSPACE TABS

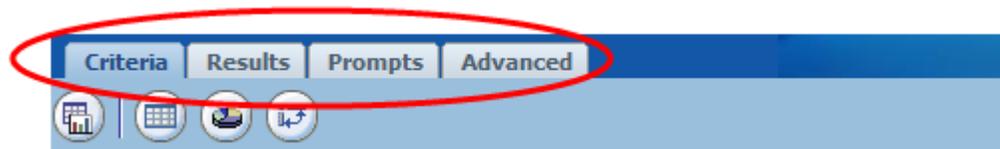


Table 10: Subject Area Workspace Tabs

Tab	Description
Criteria	The Criteria tab page is where you build and save your requests and custom filters. This is the default tab.
Results	The Results tab allows you to view and format the results of a request.
Prompts	The Prompts tab allows you to create prompts that filter a request. For a complete description of the Prompts tab, refer to <i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4</i> .
Advanced	The Advanced tab allows you to work directly with the XML and logical SQL generated for a request. For a complete description of the Advanced tab, refer to <i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4</i> .

SUBJECT AREA WORKSPACE BUTTONS

View Buttons

The View buttons appear on the Criteria tab. These buttons allow you to format the results of a request. Initial results appear in a table format. With these buttons you may add charts, graphs, or pivot tables to a result. This section provides a brief explanation of each button. For a complete description of views, refer to *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4*.

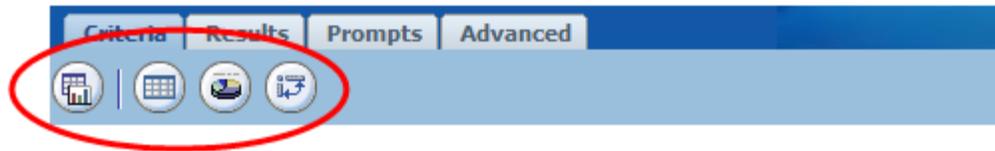


Table 11: View Buttons

Tab	Description
	The Compound Layout view button allows you to assemble different views for display on a dashboard.
	The Table view button allows you to display results in a standard table format.
	The Chart view button allows you to present results in a chart format.
	The Pivot view button allows you to arrange results in a pivot table.

Workspace Buttons

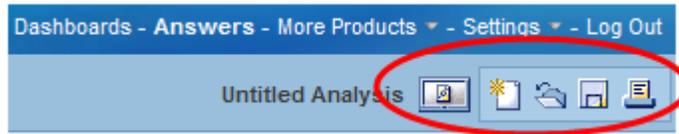


Table 12: Workspace Buttons

Tab	Description
	The Preview buttons displays the results of a request in a separate browser window and lets you see how the results will actually look on the dashboard.
	This button allows you to create a new request. When you select this button a drop-down list of marts in the Subject Area will open from which you can select the mart you wish to work with.
	Opens a previously saved request from your personal or shared folders.
	Saves the current request.

BUILDING A REQUEST

This section describes how to use the OII metrics and filters to construct requests. It is not meant to be a comprehensive explanation of all of the features and capabilities available for requests within OBIEE. Rather, it describes the basics of constructing and managing requests using the OII data components. For a complete description of requests refer to *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4*.

When you select a metric or filter from the Columns folder in the Selection Pane, the component appears in the Columns area of the Criteria tab page. The figure below shows a standard column dialog box.



The buttons on the Column box allows you to perform the following functions.

Table 13: Column Box Buttons

Tab	Description
	The Order By button specifies the order in which results should be returned, ascending or descending.
	The Format Column button lets you edit various format properties for the column.
	The Edit Formula button lets you change the column heading and the formula for the column, such as adding a Rank or Percentile function. You can also combine multiple values or ranges of values from a given column into bins.
	The Add Filter button lets you create or edit a filter for the column.
	The Delete button removes the column from the request.

To Build a Request:

This section will walk you through the steps to build a very basic analysis using the metrics and filters in the **Claim Monthly Snapshot** mart. The actual requests you build will obviously be more complex but for the purpose of this example, this request will measure Policy Counts over a Calendar Year and will be filtered by Company and Line of Business.

1. Select the **Claim Monthly Snapshot** mart:
 - Select **Claim Monthly Snapshot** in the Subject Areas list, or

- Click on the New Request button  on the Selection Pane and select **Claim Monthly Snapshot** from the drop-down list:

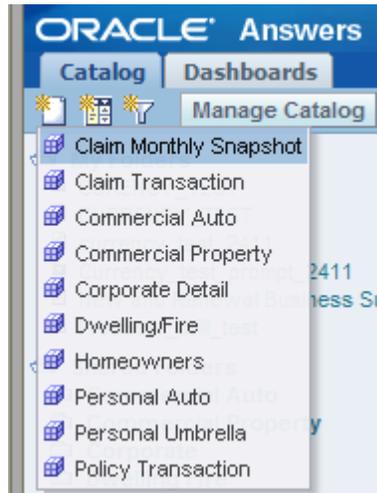


Figure 90: Mart Drop-Down List

The Criteria Tab for the **Claim Monthly Snapshot** mart will open:



Figure 91: The Criteria Tab for Claim Monthly Snapshot

- Expand the When Filters category and click on Calendar Year. The Calendar Year column filter is added to the Columns section of the workspace.

Columns

Click on column names in the selection pane to add them to the request. Once added, drag-and-drop column's format, formula and filters by clicking the buttons below its name. [?](#)



Figure 92: When Filters

- Expand the **Who Filters** category and click on **Company**. The Company filter is added to the Columns workspace.

Columns

Click on column names in the selection pane to add them to the request. Once added, drag-and-drop column's format, formula and filters by clicking the buttons below its name. [?](#)



Figure 93: When+Who Filters

- Expand the What Filters category and click on **Line of Business**. The Line of Business filter is added to the Columns workspace.

Columns

Click on column names in the selection pane to add them to the request. Once added, drag-and-drop column's format, formula and filters by clicking the buttons below its name. [?](#)



Figure 94: When+Who+What Filters

- Expand the **Metrics>Count** category and click on **Policy Count**. The Policy Count metric box is added to the request.

Columns

Click on column names in the selection pane to add them to the request. Once added, drag-and-drop column's format, formula and filters by clicking the buttons below its name. 



Figure 95: When+Who+What+Filters+Policy Count Metric

- Now that you've finished building your request you can perform the following actions:

To do this...	Go to...
Viewing the Results	page 96
Saving a Request	page 99
Retrieving a Request	page 100

Viewing the Results

There are several ways to view the results. To do so, perform one of the following actions:

- Click on the button.
- Click on the **Results** tab.

The Results tab opens and displays the results in a standard table format as shown below.

Calendar Year	Company	Line of Business	Policy Count
2004	Four Insurance Company, Ltd [05]	Personal Auto [AUTOP]	125
		Dwelling Fire [DFIRE]	140
	One Insurance Company, Ltd [01]	Homeowners [HOME]	480
		Personal Auto [AUTOP]	1,169
	Three Insurance Company, Ltd [03]	Dwelling Fire [DFIRE]	19
		Homeowners [HOME]	53
	Two Insurance Company, Ltd [02]	Dwelling Fire [DFIRE]	45
		Homeowners [HOME]	738
	Personal Auto [AUTOP]	3,469	
2005	Four Insurance Company, Ltd [05]	Personal Auto [AUTOP]	107
		Dwelling Fire [DFIRE]	91
	One Insurance Company, Ltd [01]	Homeowners [HOME]	285
		Personal Auto [AUTOP]	944
	Three Insurance Company, Ltd [03]	Dwelling Fire [DFIRE]	13
		Homeowners [HOME]	30
	Two Insurance Company, Ltd [02]	Dwelling Fire [DFIRE]	13
		Homeowners [HOME]	502
	Personal Auto [AUTOP]	3,869	

Figure 96: Request Results

You can also use the four buttons on the Criteria tab to view the results in other formats on the Results tab ([page 91](#)).

If you want to see how the results will actually look on a dashboard, select the Preview button on the menu above the workspace area:



Figure 97: Preview Button

This view displays the results in a separate browser window:

ORACLE® Answers			
Calendar Year	Company	Line of Business	Policy Count
2005	Unknown (SGIC) [SGIC]	Personal Auto [PA]	1
2006	Unknown (01) [01]	Dwelling Fire [DFIRE]	2
		Personal Umbrella [UMBRP]	1
	Unknown (KGIC) [KGIC]	ComercialProperty [PROPC]	1
		Commercial Auto [AUTOCC]	1
Unknown (SGIC) [SGIC]	Personal Auto [PA]	13	
2007	Unknown (01) [01]	Dwelling Fire [DFIRE]	4
		Personal Umbrella [UMBRP]	1
	Unknown (02) [02]	Homeowners [HOME]	2
	Unknown (KGIC) [KGIC]	ComercialProperty [PROPC]	2
		Commercial Auto [AUTOCC]	4
	Unknown (SGIC) [SGIC]	Personal Auto [PA]	16
Unknown (YFIC) [YFIC]	ComercialProperty [PROPC]	1	
	Commercial Auto [AUTOCC]	1	
2008	Unknown (01) [01]	Dwelling Fire [DFIRE]	5
		Homeowners [HOME]	1
		Personal Umbrella [UMBRP]	2
	Unknown (02) [02]	Homeowners [HOME]	2
	Unknown (KGIC) [KGIC]	ComercialProperty [PROPC]	1
		Commercial Auto [AUTOCC]	2
Unknown (SGIC) [SGIC]	Personal Auto [PA]	11	
Unknown (YFIC) [YFIC]	ComercialProperty [PROPC]	1	
2009	Unknown (01) [01]	Dwelling Fire [DFIRE]	4
		Personal Umbrella [UMBRP]	2
	Unknown (02) [02]	Homeowners [HOME]	1

Records 1 - 25

Figure 98: Preview Window

Saving a Request

1. Once you are satisfied with the request, select the **Save** button on the upper right:



Figure 99: Save Button

The Save Request dialog box opens:

 A screenshot of a 'Save Request' dialog box. The title bar says 'Save Request' and has a 'Create Folder' button on the right. The main area is divided into 'My Folders' and 'Shared Folders'. Under 'My Folders', there is a list of folders: Commercial Auto, Commercial Property, Corporate, Demo, Dwelling Fire, Homeowners, Line of Business, Personal Auto, Personal Umbrella, and Reports. Below this list are three input fields: 'Folder' with 'My Folders' entered, 'Name' with 'Cal Year Policy Counts' entered, and 'Description' with a text area containing 'This request measures Policy Counts over a Calendar Year and is filtered by Company and Line of Business'. At the bottom, there are three buttons: 'Save and Schedule', 'OK', and 'Cancel'.

Figure 100: Save a Request

2. Choose a Personal or Shared Folder. To specify a subfolder, click the **Create Folder** button and type the name of the new folder.
3. Name and Description (optional) of the request.
4. Click **OK**.

Retrieving a Request

1. In the Presentation Catalog, click on the folder containing the request. The contents of that folder will be displayed in the workspace area.

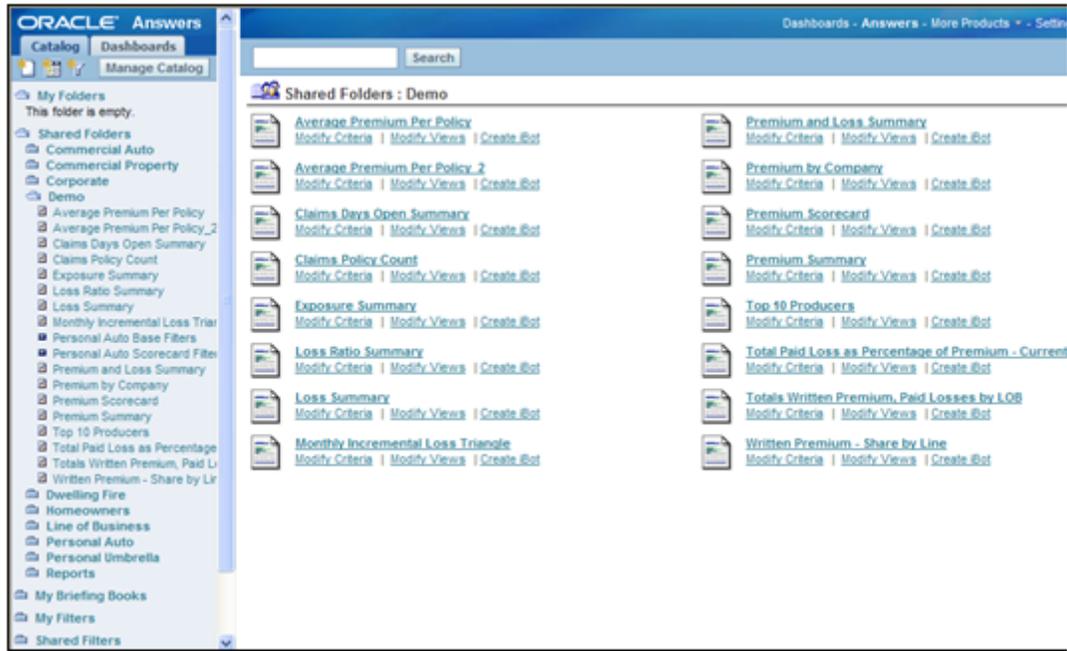


Figure 101: Contents of a Shared Folder

2. Click on the title of the request either in the Presentation Catalog or in the Workspace area. The results will be displayed in workspace area:

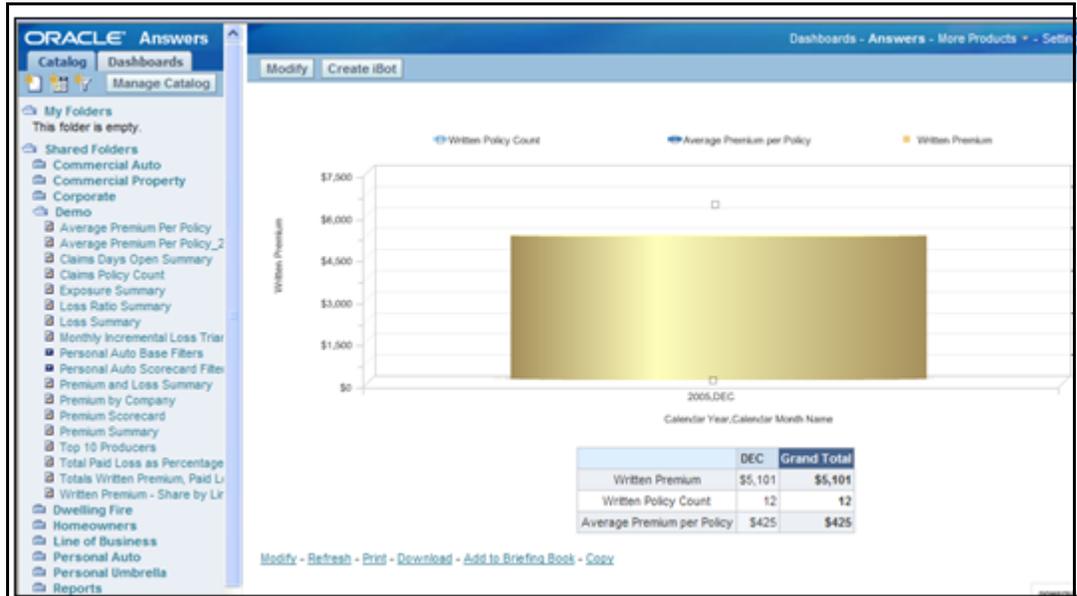


Figure 102: The Results of a Saved Request

- To open the request for editing, select the Modify button at the top of the page or the Modify link below. The columns and filters that make up the request will be displayed in the Criteria tab.

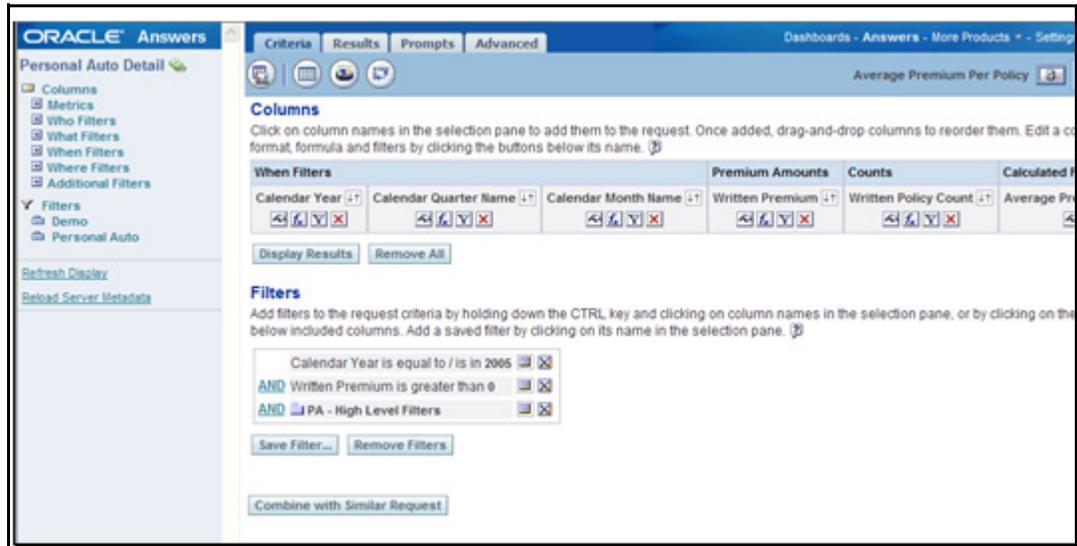


Figure 103: Displaying the Retrieved Request in the Criteria Tab

WORKING WITH COLUMN FILTERS IN A REQUEST

It's possible to streamline the data in your analysis by adding a filter to one or more of the columns. Not only can you add a filter to a column but you can also save the filter and reuse it in other requests. There are other ways to manage and use filters but this section only covers the basics.

For a comprehensive description of column filters refer to *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4*.

ADDING A FILTER TO A REQUEST

For this example we will return to the request that was built on [page 93](#). This request evaluated data across multiple calendar years. If you only wanted to work with data from a single year you can add a column filter to the Calendar Year column. In this example we will use the year 2005.



Figure 104: Add a Filter to the Calendar Year

To add a column filter to a request:

1. Select the filter by performing one of these actions:
 - Click on the **Add Filter**  icon in the Calendar Year column box or,
 - Hold down the CTRL Key and click **When Filters> Calendar Year**.

The Create/Edit Filter dialog box appears:

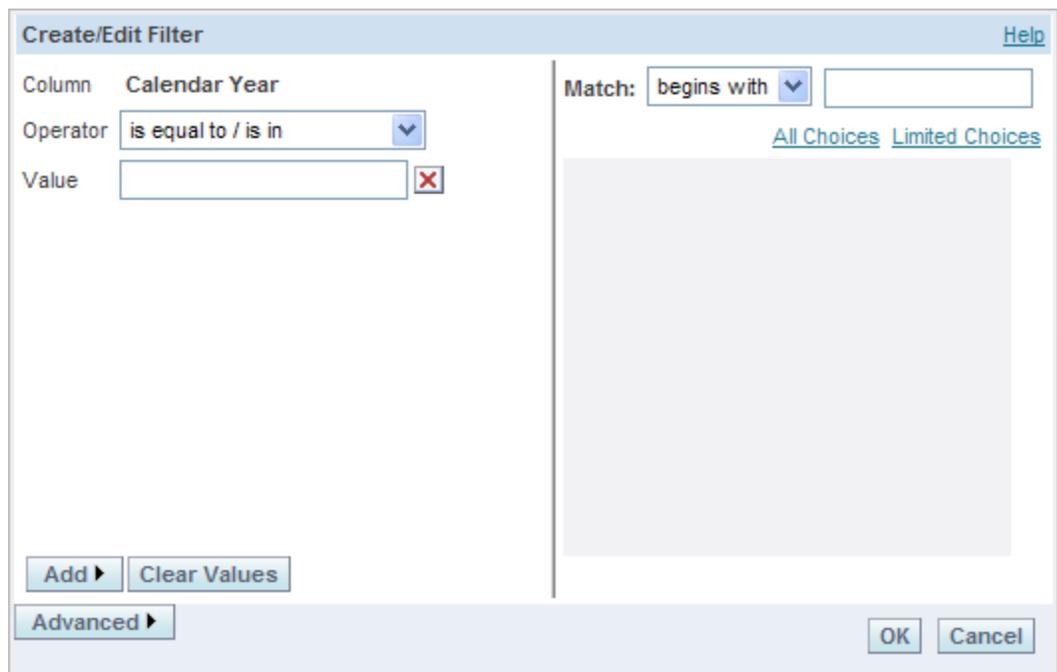


Figure 105: Create/Edit Filter Dialog Box

2. Enter **2005** in the **Value** box and press the **OK** button. The filter criteria appears under the Filters area:

Filters

Add filters to the request criteria by holding down below included columns. Add a saved filter by c

Calendar Year is equal to / is in 2005  

Figure 106: Filter Criteria

- Click on the **Display Results** button. The results now only show the data for 2005.

Calendar Year	Company	Line of Business	Policy Count
2005	Four Insurance Company, Ltd [05]	Personal Auto [AUTOP]	107
		Dwelling Fire [DFIRE]	91
	One Insurance Company, Ltd [01]	Homeowners [HOME]	285
		Personal Auto [AUTOP]	944
	Three Insurance Company, Ltd [03]	Dwelling Fire [DFIRE]	13
		Homeowners [HOME]	30
	Two Insurance Company, Ltd [02]	Dwelling Fire [DFIRE]	13
		Homeowners [HOME]	502
		Personal Auto [AUTOP]	3,869
Grand Total			5,854

Figure 107: Request Results

- Save the current request.

Saving a Filter for Use in Other Requests

You can save the filter you just created independent of the current request and use it later on in other requests.

To Save the Filter for Use in Other Requests:

- In the Filters area on the Criteria tab, click the **Save Filter...** button beneath the filter. The Choose Folder dialog box will open.
- Choose a folder in which to save the filter, either My Filters or Shared Filters. If you want to create a subfolder, use the Create Folder button.
- Type in a name and optional description for the filter.
- Click **OK**.
- Click the Refresh Display link in the selection pane. The filter appears under the Filters folder in either My Filters or in a shared filters folder.

Adding a Saved Filter for Use in Other Requests

To Add a Saved Filter to a Request:

- Open a request to which you want to add a saved column filter.
- In the selection pane, navigate to the appropriate Filters folder and click the saved filter that you want to apply.
- The Apply Saved Filter dialog box appears.
- Specify your choices, if any, in the Filter Options area.
- Click **OK**. The filter appears in the Filters area on the Criteria tab.

USING THE OII SHARED FOLDERS

For your convenience, OII provides you with the complete catalog of Scorecard and Analysis reports for each mart category as well as the reports on the Reports Dashboard under Shared Folders. Also included are such components as the interactive prompts and filters used in these reports. The saved filters found in each of the reports are also provided in the Shared Filters folder.

You can run any of these reports as is or use them and the other OII components as templates to guide you in building your own reports.

Warning DO NOT EDIT THE CONTENTS OF THE SHARED FOLDERS DIRECTLY!

Changing the OII reports and components under Shared Folders could seriously damage the OII interface. Always save a report or component under another name in a personal or shared folder before making any changes to them.

USING THE OII REPORTS IN SHARED FOLDERS

To retrieve an OII report from a shared folder:

1. Click on a mart folder under Shared Folders. The folder contains two subfolders: Analysis and Scorecard.

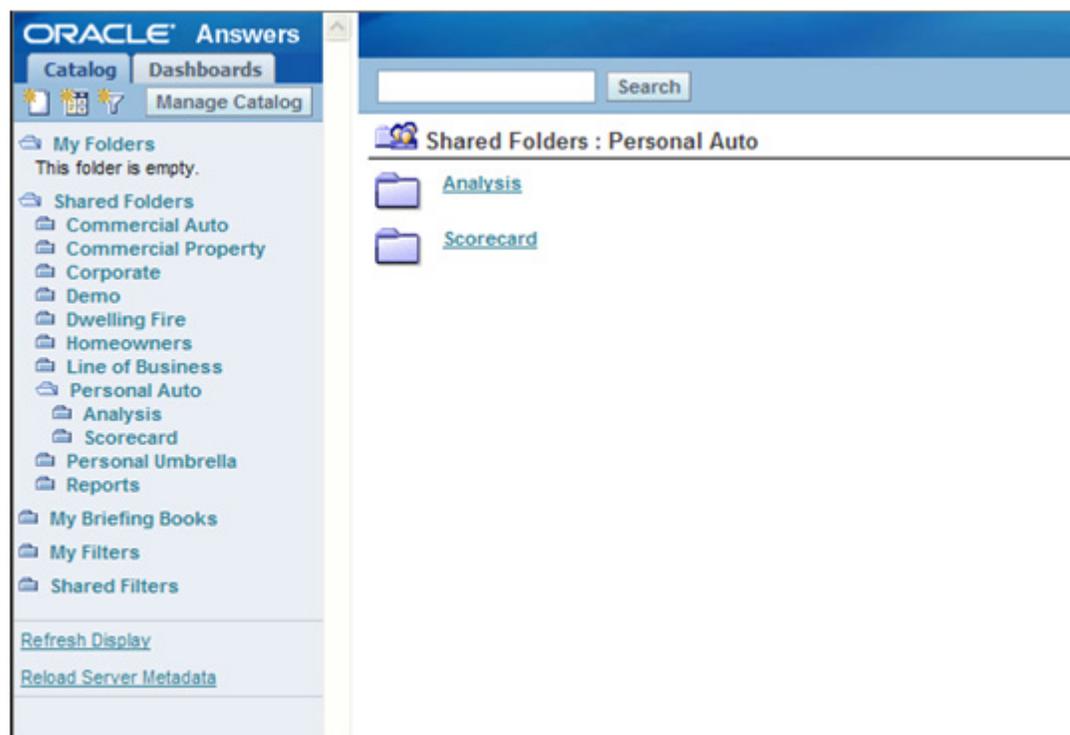


Figure 108: Analysis and Scorecard Subfolders

- Click on the Scorecard folder to display its contents in the work area:

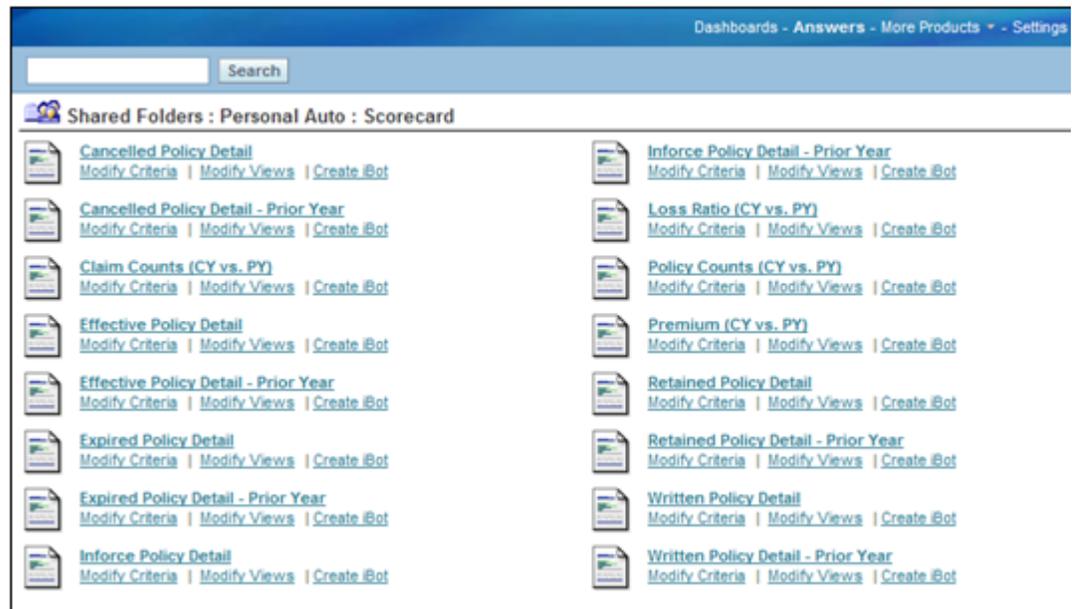


Figure 109: Personal Auto Scorecard Reports

- Use the Modify Criteria and Modify Views links to view the contents of a report.
- If you wish to use an existing report as a template for a future report, save it on the Criteria or Results tab under a different name.

The links beneath the report title perform the following functions:



Table 14: Saved Reports Links

Link	Description
Title	The title link displays the results of the request in a page in the workspace area on the right. From this page, you can navigate to the Criteria tab to edit the request.
Modify Criteria	This link opens the request in the Criteria tab for editing.
Modify Views	This link displays the report results in the Results tab for editing.
Create iBot	This link allows you to create an iBot, a software-based intelligent agent used to access, filter, and perform analytics on data, in a saved report. The discussion of iBots is beyond the scope of this manual. For more a comprehensive description on creating and using iBots, refer to the <i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide Version 10.1.3.4</i> .

USING THE OII SAVED FILTERS IN THE SHARED FILTERS FOLDER

Like the OII reports stored under Shared Folders, you can use the saved filters under the Saved Filters folders as templates when it comes time to build your own filters

Warning DO NOT EDIT THE CONTENTS OF THE SHARED FOLDERS DIRECTLY!
 Changing the OII reports and components under Shared Folders could seriously damage the OII interface. Always save a report or component under another name in a personal or shared folder before making any changes to them.

To retrieve a saved filter:

1. Click on a subfolder under Shared Filters until you see the saved filter stored in the subfolder.



Figure 110: Saved Filter

2. Click on the filter. The filter will be displayed in the Saved Filter area.



Figure 111: Contents of a Saved Filter

3. Save the filter under another name in the My Filters or in Shared Filters folder.

Appendix A

Filters

This appendix lists the standard filters for each line of business used in OII. Unique filters can be selected at the time of installation or added later and are not included in this appendix.

CLAIM MONTHLY SNAPSHOT

Table 15: Claim Monthly Snapshot

Category	Filter	Description
Who	Assistant Underwriter	The name of the assistant underwriter.
Who	Assistant Underwriter Number	A unique number assigned to an assistant underwriter.
Who	Company Name	The name of the company associated with the policy.
Who	Company Type	A code used to represent the type of company.
Who	Distribution Channel Name	The name used to represent the distribution channel.
Who	Distribution Channel Type	A code used to represent the type of distribution channel.
Who	Group Program	The code used to represent the program that a group of policies are associated with.
Who	Group Program Type	The type of program that is represented.
Who	Producer Name	The name of the producer.
Who	Producer Number	The number used to represent the producer.
Who	Producer Type	The code used to represent the producer type.
Who	Sub Producer Name	The name of an individual producer within an insurance agency.
Who	Sub Producer Number	The number used to represent the sub producer.
Who	Sub Producer Type	The code used to represent the sub producer type.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Who	Underwriter Name	The name of the underwriter.
Who	Underwriter Number	A unique number assigned to an underwriter.
Who>Assistant Underwriter		
Assistant Underwriter	Assistant Underwriter Birth Date	The assistant underwriter's birth date.
Assistant Underwriter	Assistant Underwriter City	The city where the assistant underwriter lives.
Assistant Underwriter	Assistant Underwriter Contact	The description of the contact method for the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Contact Type	The contact method for the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Country	The country of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter County	The county of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter District	The district of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Government ID Number	The government-issued identifier issued to the assistant underwriter. For example, in the USA it is SSN or FEIN.
Assistant Underwriter	Assistant Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Latitude	The latitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Longitude	The longitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Name	The name of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Number	The number or other identifier that identifies the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Present Employment Start Year	The calendar year that the assistant underwriter began employment at current employer.
Assistant Underwriter	Assistant Underwriter Postal Code	The full postal zip code as defined by company specifications.
Assistant Underwriter	Assistant Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Assistant Underwriter	Assistant Underwriter Region	The geographical region of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter State	The state of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Territory	The territory of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Tax Location ID	The Tax Location Identifier for the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Type	The classification of the assistant underwriter's role.
Who>Claim Adjuster		
Claim Adjuster	Claim Adjuster Birth Date	The claim adjuster's birth date.
Claim Adjuster	Claim Adjuster City	The city where the claim adjuster is located.
Claim Adjuster	Claim Adjuster Contact	The description of the contact method for the claim adjuster.
Claim Adjuster	Claim Adjuster Contact Type	The contact method for the claim adjuster.
Claim Adjuster	Claim Adjuster County	The county of the claim adjuster's location.
Claim Adjuster	Claim Adjuster Country	The country of the claim adjuster's location.
Claim Adjuster	Claim Adjuster District	The district of the claim adjuster's location.
Claim Adjuster	Claim Adjuster Gender	The gender (Male or Female) of the claim adjuster.
Claim Adjuster	Claim Adjuster Government ID Number	The government-issued identifier issued to the claim adjuster. For example, in the USA: it is SSN or FEIN.
Claim Adjuster	Claim Adjuster Latitude	The latitude location of the claim adjuster.
Claim Adjuster	Claim Adjuster Longitude	The longitude location of the claim adjuster.
Claim Adjuster	Claim Adjuster Marital Status	The present marital condition (single, married, divorced, widowed) of the claim adjuster.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Claim Adjuster	Claim Adjuster Name	The name of the claim adjuster.
Claim Adjuster	Claim Adjuster Number	The number or other identifier that identifies the claim adjuster.
Claim Adjuster	Claim Adjuster Postal Code	The full postal zip code as defined by company specifications.
Claim Adjuster	Claim Adjuster Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Claim Adjuster	Claim Adjuster Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Claim Adjuster	Claim Adjuster Present Employment Start Year	The calendar year that the claim adjuster began employment at current employer.
Claim Adjuster	Claim Adjuster Region	The geographical region of the claim adjuster's location.
Claim Adjuster	Claim Adjuster State	The state of the claim adjuster's location.
Claim Adjuster	Claim Adjuster Tax Location ID	The Tax Location Identifier for the claim adjuster's location.
Claim Adjuster	Claim Adjuster Territory	The territory of the claim adjuster's location.
Claim Adjuster	Claim Adjuster Type	The classification of the claim adjuster's role.
Who>Claim Examiner		
Claim Examiner	Claim Examiner Birth Date	The calendar date that details when is a claim examiner's Date of Birth.
Claim Examiner	Claim Examiner City	The city where the claim examiner is located.
Claim Examiner	Claim Examiner Contact	The description of a claim examiner's contact method.
Claim Examiner	Claim Examiner Contact Type	The contact method for a claim examiner.
Claim Examiner	Claim Examiner County	The county where the claim examiner is located.
Claim Examiner	Claim Examiner Country	The country where the claim examiner is located.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Claim Examiner	Claim Examiner DBA	The operational name (Doing Business As) of a claim examiner's business.
Claim Examiner	Claim Examiner District	The district where the claim examiner is located.
Claim Examiner	Claim Examiner Gender	The gender (Male or Female) of the claim examiner.
Claim Examiner	Claim Examiner Government ID Number	The government-issued identifier issued to the claim examiner. For example, in the USA it is SSN or FEIN.
Claim Examiner	Claim Examiner Latitude	The latitude location of the claim examiner.
Claim Examiner	Claim Examiner Longitude	The longitude location of the claim examiner.
Claim Examiner	Claim Examiner Marital Status	The present marital condition (single, married, divorced, widowed) of the claim examiner.
Claim Examiner	Claim Examiner Name	Full Name of the claim examiner
Claim Examiner	Claim Examiner Postal Code	The full postal zip code as defined by company specifications.
Claim Examiner	Claim Examiner Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Claim Examiner	Claim Examiner Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Claim Examiner	Claim Examiner Present Employment Start Year	The year when the claim examiner began working for their current employer.
Claim Examiner	Claim Examiner Region	The geographical region where the claim examiner is located.
Claim Examiner	Claim Examiner State	The state where the claim examiner is located.
Claim Examiner	Claim Examiner Tax Location ID	The Tax Location Identifier for the claim examiner's location.
Claim Examiner	Claim Examiner Territory	The territory where the claim examiner is located.
Claim Examiner	Claim Examiner Type	This code represents the claim examiner type.
Who>Claim Manager		
Claim Manager	Claim Manager Birth Date	The claim manager's birth date.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Claim Manager	Claim Manager City	The city where the claim manager lives.
Claim Manager	Claim Manager Contact	The description of the contact method for the claim manager.
Claim Manager	Claim Manager Contact Type	The contact method for the claim manager.
Claim Manager	Claim Manager County	The county of the claim manager's location.
Claim Manager	Claim Manager Country	The country of the claim manager's location.
Claim Manager	Claim Manager District	The district of the claim manager's location.
Claim Manager	Claim Manager Government ID Number	The government-issued identifier issued to the claim adjuster. For example, in the USA it is SSN or FEIN.
Claim Manager	Claim Manager Gender	The gender (Male or Female) of the claim adjuster.
Claim Manager	Claim Manager Latitude	The latitude location of the claim manager.
Claim Manager	Claim Manager Longitude	The longitude location of the claim manager.
Claim Manager	Claim Manager Marital Status	The present marital condition (single, married, divorced, widowed) of the claim manager.
Claim Manager	Claim Manager Name	The name of the claim manager.
Claim Manager	Claim Manager Number	The number or other identifier that identifies the claim manager.
Claim Manager	Claim Manager Postal Code	The full postal zip code as defined by company specifications.
Claim Manager	Claim Manager Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Claim Manager	Claim Manager Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Claim Manager	Claim Manager Present Employment Start Year	The calendar year that the claim manager began employment at current employer.
Claim Manager	Claim Manager Region	The geographical region of the claim manager's location.
Claim Manager	Claim Manager State	The state of the claim manager's location.
Claim Manager	Claim Manager Tax Location ID	The Tax Location Identifier for the claim manager's location.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Claim Manager	Claim Manager Territory	The territory of the claim manager's location.
Claim Manager	Claim Manager Type	The classification of the claim manager's role.
Who>Claimant		
Claimant	Claimant Birth Date	The claimant's birth date.
Claimant	Claimant Business Start Date	The calendar date when the claimant began business operations.
Claimant	Claimant City	The city where the claimant lives.
Claimant	Claimant Contact	The description of the contact method for the claimant.
Claimant	Claimant Contact Type	The contact method for the claimant.
Claimant	Claimant County	The county of the claimant's location.
Claimant	Claimant Country	The country of the claimant's location.
Claimant	Claimant District	The district of the claimant's location.
Claimant	Claimant DBA	The operational name (Doing Business As) of the claimant.
Claimant	Claimant Gender	The gender (Male or Female) of the claimant.
Claimant	Claimant Government ID Number	The government-issued identifier issued to the claimant. For example, in the USA: it is SSN or FEIN.
Claimant	Claimant Latitude	The latitude location of the claimant.
Claimant	Claimant Longitude	The longitude location of the claimant.
Claimant	Claimant Marital Status	The present marital condition (single, married, divorced, widowed) of the claimant.
Claimant	Claimant Name	The name of the claimant.
Claimant	Claimant NAICS Code	The North America Industry Class System (NAICS) Code assigned to the claimant.
Claimant	Claimant Nature of Business	The type or category of the business activities done by the Claimant.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Claimant	Claimant Number of Employees	The count of people employed by the claimant.
Claimant	Claimant Postal Code	The full postal zip code as defined by company specifications.
Claimant	Claimant Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Claimant	Claimant Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Claimant	Claimant Present Employment Start Year	The calendar year that the claimant began employment at current employer.
Claimant	Claimant Region	The geographical region of the claimant's location.
Claimant	Claimant SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the claimant.
Claimant	Claimant State	The state of the claimant's location.
Claimant	Claimant Tax Location ID	The Tax Location Identifier for the claimant's location.
Claimant	Claimant Territory	The territory of the claimant's location.
Claimant	Claimant Type	The classification of the claimant's role.
Who>Insurance Company		
Insurance Company	Insurance Company AM Best Number	The number or other identifier that identifies the insurance company AM Best Rating.
Insurance Company	Insurance Company Business Start Date	The calendar date when the insurance company began business operations.
Insurance Company	Insurance Company Contact	The description of the insurance company contact type.
Insurance Company	Insurance Company Contact Type	The contact method for the insurance company.
Insurance Company	Insurance Company Country	The country where the insurance company is located.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Insurance Company	Insurance Company County	The county where insurance company is located.
Insurance Company	Insurance Company City	The city where the insurance company is located.
Insurance Company	Insurance Company DBA	The operational name (Doing Business As) of an insurance company.
Insurance Company	Insurance Company District	The district where the insurance company is located.
Insurance Company	Insurance Company Government ID Number	The government-issued identifier issued to the insurance company. For example, in the USA it is SSN or FEIN.
Insurance Company	Insurance Company ISO Code	The insurance company's Insurance Service Office (ISO) Code.
Insurance Company	Insurance Company Latitude	The latitude location of insurance company.
Insurance Company	Insurance Company Longitude	The longitude location of insurance company
Insurance Company	Insurance Company Name	The name of the insurance company.
Insurance Company	Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Insurance Company	Insurance Company NAICS Code	The North America Industry Class System (NAICS) Code assigned to insurance company.
Insurance Company	Insurance Company Nature of Business	The type or category of the business activities done by the insurance company.
Insurance Company	Insurance Company Number of Employees	The count of people employed at the insurance company.
Insurance Company	Insurance Company Postal Code	The full postal zip code as defined by the insurance company specifications.
Insurance Company	Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Insurance Company	Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Insurance Company	Insurance Company Region	The geographical region where the insurance company is located.
Insurance Company	Insurance Company State	The state where the insurance company is located.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Insurance Company	Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insurance company.
Insurance Company	Insurance Company Type	The classification of the insurance company's primary operations.
Insurance Company	Insurance Company Territory	The territory where the insurance company is located.
Insurance Company	Insurance Company Tax Location ID	The Tax Location Identifier for the insurance company's location.
Who>Insured		
Insured	Insured Audit Frequency	The indicator of when an insured audit is scheduled.
Insured	Insured Audit Type	The classification of the audit activities conducted on insured.
Insured	Insured Birth Date	The calendar date when insured was born.
Insured	Insured Business Start Date Identifier	The calendar date when the insured business operations began.
Insured	Insured City	The name of the city in the address
Insured	Insured Contact	The description of the insured's contact type.
Insured	Insured Contact Type	The contact method for the insured.
Insured	Insured County	The county in the address.
Insured	Insured Country	The country code in the address.
Insured	Insured Credit Score	The code or number that represents the insured credit rating score.
Insured	Insured DBA	The operational name (Doing Business As) of an insured's business.
Insured	Insured Gender	The gender (Male or Female) of the insured.
Insured	Insured Government Identification Number	The government-issued identifier issued to the insured. For example, in the USA it is SSN or FEIN.
Insured	Insured Latitude	The latitude location of the insured's address.
Insured	Insured Longitude	The longitude location of the insured location.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Insured	Insured Marital Status	The present marital condition (single, married, divorced, widowed) of the insured.
Insured	Insured Name	The full name of the insured.
Insured	Insured NAICS Code	The North America Industry Class System (NAICS) Code assigned to insured.
Insured	Insured Nature of Business	The type or category of the business activities done by the insured.
Insured	Insured Number of Employees	The count of people employed by insured.
Insured	Insured Postal Code	The full postal zip code as defined by company specifications.
Insured	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code
Insured	Insured Postal SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Insured	Insured Present Employment Start Year	The calendar year that the insured began working for their current employer.
Insured	Insured Prior Insurance Company	Name of insurance company that last provided insurance prior to policy inception.
Insured	Insured Region	The geographical region where insured is located.
Insured	Insured Report Period	The description of the timeframe of activities considered in an insured report
Insured	Insured Risk Grade	This code represents the AM Best or company defined risk grade for insured.
Insured	Insured SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insured.
Insured	Insured State	The state of the insured's location.
Insured	Insured Tax Location Identifier	The Tax Location Identifier for the insured's location.
Insured	Insured Territory	The territory of the insured's location.
Insured	Insured Type	The type of entity that contracted with insurance company to obtain a policy.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Who>Parent Insurance Company		
Parent Insurance Company	Parent Insurance Company AM Best Number	The number or other identifier that identifies the parent insurance company AM Best Rating.
Parent Insurance Company	Parent Insurance Company Business Start Date	The calendar date when the parent insurance company began business operations.
Parent Insurance Company	Parent Insurance Company City	The city where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Contact	The description of the parent insurance company contact type.
Parent Insurance Company	Parent Insurance Company Contact Type	The contact method for the parent insurance company.
Parent Insurance Company	Parent Insurance Company County	The county where parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Country	The country where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company DBA	The operational name (Doing Business As) of a parent insurance company.
Parent Insurance Company	Parent Insurance Company District	The district where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Government ID Number	The government-issued identifier issued to the parent insurance company. For example, in the USA it is SSN or FEIN.
Parent Insurance Company	Parent Insurance Company ISO Code	The parent insurance company's Insurance Service Office (ISO) Code.
Parent Insurance Company	Parent Insurance Company Latitude	The latitude location of parent insurance company.
Parent Insurance Company	Parent Insurance Company Longitude	The longitude location of insurance company
Parent Insurance Company	Parent Insurance Company Name	The name of the parent insurance company.
Parent Insurance Company	Parent Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Parent Insurance Company	Parent Insurance Company NAICS Code	The North America Industry Class System (NAICS) code assigned to parent insurance company.
Parent Insurance Company	Parent Insurance Company Nature of Business	The type or category of the business activities done by the parent insurance company.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Parent Insurance Company	Parent Insurance Company Number of Employees	The count of people employed at the parent insurance company.
Parent Insurance Company	Parent Insurance Company Postal Code	The full postal zip code as defined by the parent insurance company specifications.
Parent Insurance Company	Parent Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Parent Insurance Company	Parent Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Parent Insurance Company	Parent Insurance Company Region	The geographical region where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the parent insurance company.
Parent Insurance Company	Parent Insurance Company State	The state where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Tax Location ID	The Tax Location Identifier for the parent insurance company's location.
Parent Insurance Company	Parent Insurance Company Type	The classification of the parent insurance company's primary operations.
Parent Insurance Company	Parent Insurance Company Territory	The territory where the parent insurance company is located.
Who>Reinsurance Company		
Reinsurance Company	Reinsurance Company Business Start Date	The calendar date when the reinsurance company began business operations.
Reinsurance Company	Reinsurance Company Contract	The description of the reinsurance company contract.
Reinsurance Company	Reinsurance Company Contact Type	The contact method for reinsurance company.
Reinsurance Company	Reinsurance Company County	The county where reinsurance company is located.
Reinsurance Company	Reinsurance Company Country	The country where reinsurance company is located.
Reinsurance Company	Reinsurance Company City	The city where reinsurance company is located.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company DBA	The operational name (Doing Business As) of a reinsurance company.
Reinsurance Company	Reinsurance Company District	District where reinsurance company is located.
Reinsurance Company	Reinsurance Company Latitude	The latitude location of reinsurance company.
Reinsurance Company	Reinsurance Company Longitude	The longitude location of reinsurance company.
Reinsurance Company	Reinsurance Company NAICS Code	North America Industry Class System (NAICS) Code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company Name	The name of the reinsurance company.
Reinsurance Company	Reinsurance Company Nature of Business	The type or category of the business activities done by the reinsurance company.
Reinsurance Company	Reinsurance Company Number	Identifier assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company Number of Employees	The count of people employed by the reinsurance company.
Reinsurance Company	Reinsurance Company Postal Code	The full postal zip code as defined by company specifications.
Reinsurance Company	Reinsurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Reinsurance Company	Reinsurance Company Postal Code SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Reinsurance Company	Reinsurance Company Region	The geographical region of reinsurance company.
Reinsurance Company	Reinsurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company State	The state where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Tax Location Identifier	The Tax Location Identifier of the reinsurance company's location.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company Territory	The territory where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Type Code	The code that identifies reinsurance company type.
Who>Sub Producer		
Sub Producer	Sub Producer Birth Date	The calendar date that details when is a sub producer's Date of Birth.
Sub Producer	Sub Producer Business Start Date	The calendar date when the sub producer began business operations.
Sub Producer	Sub Producer City	The city where the sub producer is located.
Sub Producer	Sub Producer Contact	The description of a sub producer's contact method.
Sub Producer	Sub Producer Contact Type	The contact method for a sub producer.
Sub Producer	Sub Producer County	The county where the sub producer is located.
Sub Producer	Sub Producer Country	The country where the sub producer is located.
Sub Producer	Sub Producer DBA	The operational name (Doing Business As) of a sub producer's business.
Sub Producer	Sub Producer District	The district where the sub producer is located.
Sub Producer	Sub Producer Effective Date	The calendar date the sub producer appointment begins.
Sub Producer	Sub Producer Gender	The gender (Male or Female) of the sub producer.
Sub Producer	Sub Producer Government ID Number	The government-issued identifier issued to the sub producer. For example, in the USA it is SSN or FEIN.
Sub Producer	Sub Producer Latitude	The latitude location of sub producer.
Sub Producer	Sub Producer Longitude	The longitude location of sub producer.
Sub Producer	Sub Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the sub producer.
Sub Producer	Sub Producer Name	The full name of the sub producer.
Sub Producer	Sub Producer NAICS Code	The North America Industry Class System (NAICS) Code issued to sub producer.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Sub Producer	Sub Producer Nature of Business	The type or category of the business activities done by the sub producer.
Sub Producer	Sub Producer Number of Employees	The count of people employed by sub producer.
Sub Producer	Sub Producer Postal Code	The full postal zip code as defined by company specifications.
Sub Producer	Sub Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Sub Producer	Sub Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Sub Producer	Sub Producer Present Employment Start Year	Year when sub producer began working for their current employer.
Sub Producer	Sub Producer Region	The geographical region where the sub producer is located.
Sub Producer	Sub Producer State	The state where the sub producer is located.
Sub Producer	Sub Producer State_LIC_Number	The government-issued license number issued to the sub producer.
Sub Producer	Sub Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the sub producer.
Sub Producer	Sub Producer Tax Location ID	The Tax Location Identifier for the sub producer's location
Sub Producer	Sub Producer Territory	The territory where the sub producer is located
Sub Producer	Sub Producer Type	This code represents the sub producer type.
Who>Supplier		
Supplier	Preferred Supplier Code	This system code identifies if a supplier is a preferred supplier.
Supplier	Preferred Supplier Type	This system code identifies preferred supplier type.
Supplier	Supplier Birth Date	The supplier's birth date.
Supplier	Supplier Business Start Date	The calendar date when the supplier began business operations.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Supplier	Supplier CATG	This system code represents the supplier category.
Supplier	Supplier City	The city where the supplier lives.
Supplier	Supplier Contact	The description of the contact method for the supplier.
Supplier	Supplier Contact Type	The contact method for the supplier.
Supplier	Supplier County	The county of the supplier's location.
Supplier	Supplier Country	The country of the supplier's location.
Supplier	Supplier DBA	The operational name (Doing Business As) of a supplier's business.
Supplier	Supplier District	The district of the supplier's location.
Supplier	Supplier Gender	The gender (Male or Female) of the claim adjuster.
Supplier	Supplier Government ID Number	The government-issued identifier issued to the claim adjuster. For example, in the USA it is SSN or FEIN.
Supplier	Supplier Latitude	The latitude location of the supplier.
Supplier	Supplier Longitude	The longitude location of the supplier.
Supplier	Supplier Marital Status	The present marital condition (single, married, divorced, widowed) of the supplier.
Supplier	Supplier NAICS Code	The North America Industry Class System (NAICS) Code issued to supplier.
Supplier	Supplier Name	The name of the supplier.
Supplier	Supplier Number	The number or other identifier that identifies the supplier.
Supplier	Supplier Number of Employees	The count of people employed by the supplier.
Supplier	Supplier Postal Code	The full postal zip code as defined by company specifications.
Supplier	Supplier Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Supplier	Supplier Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Supplier	Supplier Present Employment Start Year	The calendar year that the supplier began employment at current employer.
Supplier	Supplier Region	The geographical region of the supplier's location.
Supplier	Supplier SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the supplier.
Supplier	Supplier State	The state of the supplier's location.
Supplier	Supplier Tax Location ID	The Tax Location Identifier for the supplier's location.
Supplier	Supplier Territory	The territory of the supplier's location.
Supplier	Supplier Type	The classification of the supplier's role.
Who>Underwriter		
Underwriter	Underwriter Birth Date	The underwriter's birth date.
Underwriter	Underwriter City	The city where the underwriter lives.
Underwriter	Underwriter Contact	The description of the contact method for the underwriter.
Underwriter	Underwriter Contact Type	The contact method for the underwriter.
Underwriter	Underwriter County	The county of the underwriter's location.
Underwriter	Underwriter Country	The country of the underwriter's location.
Underwriter	Underwriter District	The district of the underwriter's location.
Underwriter	Underwriter Government ID Number	The government-issued identifier issued to the underwriter. For example, in the USA it is SSN or FEIN.
Underwriter	Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Underwriter	Underwriter Latitude	The latitude location of the underwriter.
Underwriter	Underwriter Longitude	The longitude location of the underwriter.
Underwriter	Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the underwriter.
Underwriter	Underwriter Name	The name of the underwriter.
Underwriter	Underwriter Number	The number or other identifier that identifies the underwriter.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Underwriter	Underwriter Present Employment Start Year	The calendar year that the underwriter began employment at current employer.
Underwriter	Underwriter Postal Code	The full postal zip code as defined by company specifications.
Underwriter	Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Underwriter	Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Underwriter	Underwriter Region	The geographical region of the underwriter's location.
Underwriter	Underwriter State	The state of the underwriter's location.
Underwriter	Underwriter Tax Location ID	The Tax Location Identifier for the underwriter's location.
Underwriter	Underwriter Territory	The territory of the underwriter's location.
Underwriter	Underwriter Type	The classification of the underwriter's role.
What		
What	Annual Statement Line	A code that indicates in which line of the annual statement a transaction belongs.
What	Cause of Loss	This system code represents the condition that caused a loss to occur.
What	Coverage	This field reports a code based on the type of coverage afforded on the insurance line policy. The aggregate of risks covered by the terms of a contract of insurance.
What	Currency Code	This system code identifies document currency.
What	Line of Business System Code	This system code represents a system line of business.
What	Loss Suit	A code that identifies the status of a particular claim that is or was in the litigation process.
What	Monoline/Package	A code that tells if a policy is a monoline policy or is written as part of a package.
What	National Catastrophe	The number assigned to a national catastrophe to make it unique. This is as opposed to the company assigned code.
What	Personal/Commercial	A code used to identify a policy as personal or commercial lines.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
What	Policy Age	The number of months in policy term.
What	Primary Class Code	In a situation where the class code is split into more than one useful breakout, this is the primary portion.
What	Secondary Class Code	In a situation where the class code is split into more than one useful breakout, this is the secondary portion.
What	Subline	This code is used for reporting under the ISO Commercial Statistical Plan.
What	Type of Loss	This system code describes the type of loss.
What	Voluntary or Assigned Risk	Indicates whether the insured is covered under an assigned risk or voluntary risk program.
What>Billing Account		
Billing Account	Billing Account Number	The number of the account in the billing system, if different than the policy system.
Billing Account	Method of Payment	The manner that the insured makes payments on billing account balance.
Billing Account	Payment Plan	The payment schedule applied to a policy balance.
Billing Account	Payment Service	The Payment Service code identifies the type of billing plan used for the policy.
What>Catastrophe		
Catastrophe	Catastrophe Begin Date	This calendar date represents when the catastrophe started.
Catastrophe	Catastrophe Code	This system code identifies a catastrophe. This is the number or other identifier assigned by the company.
Catastrophe	Catastrophe End Date	This calendar date represents when a catastrophe ended.
Catastrophe	Catastrophe Source Code	This system code describes the source of a catastrophe.
Catastrophe	Catastrophe State	This system code identifies the state where a catastrophe occurred.
Catastrophe	Excess Catastrophe Code	This system code indicates that a catastrophe loss is in excess of a policyholders' retention.
Catastrophe	National Catastrophe Code	This system code identifies the national catastrophe occurrence.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
What>Class		
Class	Class Code	A class code is a three to six character field used to classify the general characteristics of an employees function. Used for rating.
Class	Class State	The state associated with the insured address.
Class	Primary Class Code	In a situation where the class code is split into more than one useful breakout, this is the primary portion.
Class	Secondary Class Code	In a situation where the class code is split into more than one useful breakout, this is the secondary portion.
What>Coverage		
Coverage	Annual Statement Line	A code that indicates in which line of the annual statement a transaction belongs.
Coverage	Bureau Report Plan	Indicates the statistical plan code used for bureau reporting.
Coverage	Coverage	This field reports a code based on the type of coverage afforded on the insurance line policy. The aggregate of risks covered by the terms of a contract of insurance.
Coverage	Coverage Category	A way to group coverages within a line of business.
Coverage	Coverage Effective Date	The calendar date when the policy coverage begins.
Coverage	Coverage Expiration Date	The calendar date when the policy coverage ends.
Coverage	Coverage Part	An indicator of a line of business within a package policy.
Coverage	Secondary Coverage	A client defined code to further breakdown the type of coverage afforded on the insurance line policy.
Coverage	Statistical Plan	This code identifies the statistical plan for coverage.
What>Deductible		
Deductible	Deductible	The amount of loss that the policyholder is responsible to pay.
Deductible	Deductible Applies To	This code is used to identify to what the deductible applies.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Deductible	Deductible Basis	This code represents the basis applied to determine the deductible.
Deductible	Deductible Type	This code represents the deductible type that pertains to a particular policy coverage.
What>Distribution Channel		
Distribution Channel	Distribution Channel Name	The full name of the distribution channel.
Distribution Channel	Distribution Channel Number	The number or other identifier assigned to the distribution channel.
Distribution Channel	Distribution Channel Type	The classification of the activities of distribution channel.
Distribution Channel	Typical Commission Rate	The rate of commission given to a producer for a sale of a policy unless the commission rate is overridden.
What>Feature		
Feature	Accident Injury Analysis Code	This system code summarizes the facts relating to a claim. The code can be used to indicate injuries such as body parts involved, type of injury or disease and cause of condition related to a claim.
Feature	Accident Injury Analysis Sub Code	This system code describes the loss in more detail than the accident injury analysis code and further describes such things as the object/ incident involved in the loss (i.e. machinery, wet floor, etc.).
Feature	Cause of Loss	This system code represents the condition that caused a loss to occur.
Feature	Disability Type	This system code indicates the disability type.
Feature	Injured Body Part	This system code represents an anatomical part of the insured body.
Feature	Type of Loss	This is the CSP type of loss code It includes the loss location and the loss cause.
What>Feature Status		
Feature Status	Feature Closed Date	This calendar date represents when the claim feature, defined as a subset of a claim occurrence, was closed.
Feature Status	Feature Opened Date	This calendar date represents when the claim feature, defined as a subset of a claim occurrence, was opened.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Feature Status	Feature Reclosed Date	This calendar date represents when the claim feature, defined as a subset of a claim occurrence, was reclosed.
Feature Status	Feature Reopened Date	This calendar date represents when the claim feature was opened after previous closing.
Feature Status	Feature Status	This system code identifies the current condition of the claim feature, defined as a subset of a claim occurrence.
What>Group Program		
Group Program	Group Program Anniversary Date	The calendar date that identifies the anniversary of a group program.
Group Program	Group Program Dividend Plan	The classification of the manner in which a group program dividend is paid.
Group Program	Group Program Dividend Date	The calendar date that identifies the dividend date of a group program.
Group Program	Group Program Member Count	This number identifies the group program.
Group Program	Group Program Name	The name of the program, other than state or national, that a group of policies are associated with.
Group Program	Group Program Natural Name	The name of the national program that a group of policies are associated with.
Group Program	Group Program Original Date	The calendar date that identifies group program Origination Date.
Group Program	Group Program Status	The description of the current condition of a program with which a group of policies is associated.
Group Program	Group Program State	The state associated with group program.
Group Program	Group Program Type	The type of program that is represented.
What>Limit		
Limit	First Limit	The first limit of coverage for each type of coverage.
Limit	Full Limit	The limit associated with the coverage code.
Limit	Limit Applies To	A code identifying to what the limit applies.
Limit	Limit Basis	The code for basis to which the limit applies.
Limit	Limit Type	The code that describes a limit.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Limit	Second Limit	The second limit of coverage for each type of coverage.
Limit	Third Limit	The third limit of coverage for each type of coverage.
Limit	Valuation Code	This code reports the valuation of the limit of coverage for each type of coverage.
What>Line of Business		
Line of Business	Company Product Code	A company-unique code indicating the product classification of this policy. The source of this code list is the individual carriers.
Line of Business	Line of Business	A code used to represent the line of business.
Line of Business	Line of Business Sub Code	A further breakdown of line of business. May be defined by company.
Line of Business	Line of Business System Code	This system code represents a system line of business.
Line of Business	Personal or Commercial	A code used to identify a policy as personal or commercial lines.
What>Litigation		
Litigation	Alternative Dispute Resolution	This system code identifies the outcome of using an intermediary for dispute settlement.
Litigation	Compensatory Demand Amount	This number represents the amount of requested compensatory damages.
Litigation	Compensatory Offer Amount	This number represents the amount of offered compensatory damages.
Litigation	Disclosure Date	This date represents the calendar date of disclosure of information related to litigation.
Litigation	Litigation Amount	This number represents the amount of litigation case.
Litigation	Litigation Close Date	This calendar date represents when litigation case was closed.
Litigation	Litigation County	This system code describes a litigation county.
Litigation	Litigation Disposition	This system code identifies the litigation disposition.
Litigation	Litigation Opened Date	This calendar date represents when litigation case was filed in court.
Litigation	Litigation State	This system code identifies the litigation state.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Litigation	Trial Date	This calendar date represents the when the trial is scheduled, or has already occurred.
What>Reinsurance Contract		
Reinsurance Contract	Reinsurance Contract Begin Date	The calendar date that identifies when reinsurance contract begins.
Reinsurance Contract	Reinsurance Contract Ceded Loss Ratio	The ratio of losses and loss adjustment expenses incurred to premiums earned for the portion of exposure that is transferred to a reinsurance company.
Reinsurance Contract	Reinsurance Contract Category	The category of the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Cession Number	The unique identifier of the reinsurance contract cession.
Reinsurance Contract	Reinsurance Contract Certificate Number	The unique identifier assigned to the reinsurance contract certificate.
Reinsurance Contract	Reinsurance Contract End Date	The calendar date reinsurance contract ends.
Reinsurance Contract	Reinsurance Contract Facultative Commission Percent	The percentage commission paid to reinsurer.
Reinsurance Contract	Reinsurance Contract Layer	The reinsurance contract layer describes the amount of reinsurance provided in the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Type	The contract type for reinsurance contract dimension.
Reinsurance Contract	Reinsurance Contract Treaty Number	A unique identifier assigned to a reinsurance contract treaty.
When		
When	Calendar Month	The numeric representation of the month (1-12).
When	Calendar Month Name	The name of a month (Jan, Feb, etc.).
When	Calendar Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Calendar Quarter Name	The name of a quarter (Q1 - Q4).
When	Calendar Year	The one-year period that begins on January 1 and ends on December 31.
When	Fiscal Month	The numeric representation of the month (1-12).

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
When	Fiscal Month Name	The name of a month (Jan, Feb, etc.).
When	Fiscal Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Fiscal Quarter Name	The name of a quarter (Q1 - Q4).
When	Fiscal Year	The year commencing with the effective date of the insurance policy or with an anniversary of that date.
Where		
Where	Insured City	The name of the city in the address.
Where	Insured Country	The country code in the address.
Where	Insured County	The county in the address.
Where	Insured District	The geographical district where the insured is located.
Where	Insured Latitude	The latitude location of the insured's address.
Where	Insured Longitude	The longitude location of the insured's address.
Where	Insured Postal Code	The full postal zip code as defined by company specifications.
Where	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Insured Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Where	Insured Region	The geographical region where insured is located.
Where	Insured State	The state of the insured's location.
Where	Insured Territory	The territory of the insured's location.
Where	Location of Loss City	The city where the loss occurred.
Where	Location of Loss Country	The country where the loss occurred.
Where	Location of Loss County	The county where the loss occurred.
Where	Location of Loss District	The district where the loss occurred.
Where	Location of Loss Latitude	The latitude location where the loss occurred.
Where	Location of Loss Longitude	The longitude location where the loss occurred.
Where	Location of Loss Postal Code	The full postal zip code as defined by company specifications.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Where	Location of Loss Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Location of Loss Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code. This is the sub code of the location where the loss occurred.
Where	Location of Loss Region	The geographical region where a loss occurred.
Where	Location of Loss State	The state where a loss occurred.
Where	Location of Loss Tax Location ID	The Tax Location Identifier of the location where a loss occurred.
Where	Location of Loss Territory	The territory where a loss occurred.
Additional Filters>Policy Detail		
Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.
Policy Detail	Cancel Reason	The system code describes the reason for a cancellation.
Policy Detail	Exposure Basis	The denomination in which the exposure units are expressed.
Policy Detail	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
Policy Detail	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
Policy Detail	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
Policy Detail	Package Discount Percent	The percentage of premium waived when Package Discount applies.
Policy Detail	Package Modification Assignment Code	This code indicates the package modification assignment.
Policy Detail	Package Modification Factor	The percentage of premium waived as a result of packaging coverages.
Policy Detail	Policy Age	The number of months in policy term.
Policy Detail	Policy Cancellation Date	The date a policy or coverage was terminated by cancellation.
Policy Detail	Policy Effective Date	The effective date of the policy related to this transaction.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Policy Detail	Policy Expiration Date	The expiration date of the policy related to this transaction.
Policy Detail	Policy Number	A unique client-assigned number identifying each policy.
Policy Detail	Policy Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
Policy Detail	Policy Type	The description of the type of coverage included in a policy.
Policy Detail	Policy Type Category	The categorization of the type of coverage a policy includes.
Policy Detail	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
Policy Detail	Premium Basis	The basis to which rates are applied to determine premiums.
Policy Detail	Renewal Term	The length of the renewal policy period (term) in months.
Policy Detail	Supporting Business Discount Percent	The percentage of premium waived when supporting business discount applies.
Policy Detail	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.
Additional Filters>Claim Detail		
Claim Detail	Case Made Retroactive Date	The calendar date that the claim case was made retroactive.
Claim Detail	Case Management Assigned Date	The calendar date that claim management is assigned to claim.
Claim Detail	Claim Closed Date	The date on which the insurance company closed the claim.
Claim Detail	Claim Number	A unique number assigned to each claim.
Claim Detail	Claim Opened Date	The date a claim was opened.
Claim Detail	Claim Reclosed Date	The date a claim was closed after being reopened.
Claim Detail	Claim Reopened Date	The date on which a closed claim was changed to open status.
Claim Detail	Claim Report Class Code	The code describes the class code report class applicable to the claim, regardless of the class codes on the policy.

Table 15: Claim Monthly Snapshot (Continued)

Category	Filter	Description
Claim Detail	Claim Reported By	The source of claim report.
Claim Detail	Claim Reported Date	The date the insured filed the claim with the insurance carrier.
Claim Detail	Claim Status	The process condition of a claim.
Claim Detail	Claims Made Basis Code	The code identifies whether or not the claims made basis is being used for reporting of claims.
Claim Detail	First Claim Contact Date	The calendar date that the claimant was first contacted by the insuring company or its representative.
Claim Detail	First Claim Payment Date	The calendar date when the first payment was made on a claim.
Claim Detail	Fraud Claim Code	The code to indicate potential fraudulent claim based on adjusters' investigation.
Claim Detail	Last Claim Payment Date	The calendar date when the last claim payment was issued.
Claim Detail	Last Salvage Payment Date	The calendar date when the last payment was made associated with salvage.
Claim Detail	Last Subrogation Payment Date	The calendar date when last subrogation payment was received.
Claim Detail	Loss Date	The date on which an accident or loss occurred regardless of when the claim was filed.
Claim Detail	Loss Month	The month that the claim loss period began.
Claim Detail	Loss Quarter	The quarter that the claim loss period began.
Claim Detail	Loss Time	The number that identifies the time a loss occurred.
Claim Detail	Loss Year	The year that the claim loss period began.
Claim Detail	Number of Rental Days	The total count of days a replacement item is rented.
Claim Detail	Number of Repair Days	The total count of days required to repair an item.
Claim Detail	Number of Storage Days	The total count of days an item is stored.

CLAIM TRANSACTION

Table 16: Claim Transaction

Category	Filter	Description
Who	Assistant Underwriter	The name of the assistant underwriter.
Who	Assistant Underwriter Number	A unique number assigned to an assistant underwriter.
Who	Company Name	The name of the company associated with the policy.
Who	Company Type	A code used to represent the type of company.
Who	Distribution Channel Name	The name used to represent the distribution channel.
Who	Distribution Channel Type	A code used to represent the type of distribution channel.
Who	Group Program	The code used to represent the program that a group of policies are associated with.
Who	Group Program Type	The type of program that is represented.
Who	Producer Name	The name of the producer.
Who	Producer Number	The number used to represent the producer.
Who	Producer Type	The code used to represent the producer type.
Who	Sub Producer Name	The name of an individual producer within an insurance agency.
Who	Sub Producer Number	The number used to represent the sub producer.
Who	Sub Producer Type	The code used to represent the sub producer type.
Who	Underwriter Name	The name of the underwriter.
Who	Underwriter Number	A unique number assigned to an underwriter.
Who>Assistant Underwriter		
Assistant Underwriter	Assistant Underwriter Birth Date	The assistant underwriter's birth date.
Assistant Underwriter	Assistant Underwriter City	The city where the assistant underwriter lives.
Assistant Underwriter	Assistant Underwriter Contact	The description of the contact method for the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Contact Type	The contact method for the assistant underwriter.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter Country	The country of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter County	The county of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter District	The district of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Government ID Number	The government-issued identifier issued to the assistant underwriter. For example, in the USA it is SSN or FEIN.
Assistant Underwriter	Assistant Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Latitude	The latitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Longitude	The longitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Name	The name of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Number	The number or other identifier that identifies the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Present Employment Start Year	The calendar year that the assistant underwriter began employment at current employer.
Assistant Underwriter	Assistant Underwriter Postal Code	The full postal zip code as defined by company specifications.
Assistant Underwriter	Assistant Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Assistant Underwriter	Assistant Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Assistant Underwriter	Assistant Underwriter Region	The geographical region of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter State	The state of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Territory	The territory of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Tax Location ID	The Tax Location Identifier for the assistant underwriter's location.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter Type	The classification of the assistant underwriter's role.
Who>Claim Adjuster		
Claim Adjuster	Claim Adjuster Birth Date	The claim adjuster's birth date.
Claim Adjuster	Claim Adjuster City	The city where the claim adjuster is located.
Claim Adjuster	Claim Adjuster Contact	The description of the contact method for the claim adjuster.
Claim Adjuster	Claim Adjuster Contact Type	The contact method for the claim adjuster.
Claim Adjuster	Claim Adjuster County	The county of the claim adjuster's location.
Claim Adjuster	Claim Adjuster Country	The country of the claim adjuster's location.
Claim Adjuster	Claim Adjuster District	The district of the claim adjuster's location.
Claim Adjuster	Claim Adjuster Gender	The gender (Male or Female) of the claim adjuster.
Claim Adjuster	Claim Adjuster Government ID Number	The government-issued identifier issued to the claim adjuster. For example, in the USA: it is SSN or FEIN.
Claim Adjuster	Claim Adjuster Latitude	The latitude location of the claim adjuster.
Claim Adjuster	Claim Adjuster Longitude	The longitude location of the claim adjuster.
Claim Adjuster	Claim Adjuster Marital Status	The present marital condition (single, married, divorced, widowed) of the claim adjuster.
Claim Adjuster	Claim Adjuster Name	The name of the claim adjuster.
Claim Adjuster	Claim Adjuster Number	The number or other identifier that identifies the claim adjuster.
Claim Adjuster	Claim Adjuster Postal Code	The full postal zip code as defined by company specifications.
Claim Adjuster	Claim Adjuster Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Claim Adjuster	Claim Adjuster Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Claim Adjuster	Claim Adjuster Present Employment Start Year	The calendar year that the claim adjuster began employment at current employer.
Claim Adjuster	Claim Adjuster Region	The geographical region of the claim adjuster's location.
Claim Adjuster	Claim Adjuster State	The state of the claim adjuster's location.
Claim Adjuster	Claim Adjuster Tax Location ID	The Tax Location Identifier for the claim adjuster's location.
Claim Adjuster	Claim Adjuster Territory	The territory of the claim adjuster's location.
Claim Adjuster	Claim Adjuster Type	The classification of the claim adjuster's role.
Who>Claim Examiner		
Claim Examiner	Claim Examiner Birth Date	The calendar date that details when is a claim examiner's Date of Birth.
Claim Examiner	Claim Examiner City	The city where the claim examiner is located.
Claim Examiner	Claim Examiner Contact	The description of a claim examiner's contact method.
Claim Examiner	Claim Examiner Contact Type	The contact method for a claim examiner.
Claim Examiner	Claim Examiner County	The county where the claim examiner is located.
Claim Examiner	Claim Examiner Country	The country where the claim examiner is located.
Claim Examiner	Claim Examiner DBA	The operational name (Doing Business As) of a claim examiner's business.
Claim Examiner	Claim Examiner District	The district where the claim examiner is located.
Claim Examiner	Claim Examiner Gender	The gender (Male or Female) of the claim examiner.
Claim Examiner	Claim Examiner Government ID Number	The government-issued identifier issued to the claim examiner. For example, in the USA it is SSN or FEIN.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Claim Examiner	Claim Examiner Latitude	The latitude location of the claim examiner.
Claim Examiner	Claim Examiner Longitude	The longitude location of the claim examiner.
Claim Examiner	Claim Examiner Marital Status	The present marital condition (single, married, divorced, widowed) of the claim examiner.
Claim Examiner	Claim Examiner Name	Full Name of the claim examiner
Claim Examiner	Claim Examiner Postal Code	The full postal zip code as defined by company specifications.
Claim Examiner	Claim Examiner Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Claim Examiner	Claim Examiner Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Claim Examiner	Claim Examiner Present Employment Start Year	The year when the claim examiner began working for their current employer.
Claim Examiner	Claim Examiner Region	The geographical region where the claim examiner is located.
Claim Examiner	Claim Examiner State	The state where the claim examiner is located.
Claim Examiner	Claim Examiner Tax Location ID	The Tax Location Identifier for the claim examiner's location.
Claim Examiner	Claim Examiner Territory	The territory where the claim examiner is located.
Claim Examiner	Claim Examiner Type	This code represents the claim examiner type.
Who>Claim Manager		
Claim Manager	Claim Manager Birth Date	The claim manager's birth date.
Claim Manager	Claim Manager City	The city where the claim manager lives.
Claim Manager	Claim Manager Contact	The description of the contact method for the claim manager.
Claim Manager	Claim Manager Contact Type	The contact method for the claim manager.
Claim Manager	Claim Manager County	The county of the claim manager's location.
Claim Manager	Claim Manager Country	The country of the claim manager's location.
Claim Manager	Claim Manager District	The district of the claim manager's location.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Claim Manager	Claim Manager Government ID Number	The government-issued identifier issued to the claim adjuster. For example, in the USA it is SSN or FEIN.
Claim Manager	Claim Manager Gender	The gender (Male or Female) of the claim adjuster.
Claim Manager	Claim Manager Latitude	The latitude location of the claim manager.
Claim Manager	Claim Manager Longitude	The longitude location of the claim manager.
Claim Manager	Claim Manager Marital Status	The present marital condition (single, married, divorced, widowed) of the claim manager.
Claim Manager	Claim Manager Name	The name of the claim manager.
Claim Manager	Claim Manager Number	The number or other identifier that identifies the claim manager.
Claim Manager	Claim Manager Postal Code	The full postal zip code as defined by company specifications.
Claim Manager	Claim Manager Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Claim Manager	Claim Manager Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Claim Manager	Claim Manager Present Employment Start Year	The calendar year that the claim manager began employment at current employer.
Claim Manager	Claim Manager Region	The geographical region of the claim manager's location.
Claim Manager	Claim Manager State	The state of the claim manager's location.
Claim Manager	Claim Manager Tax Location ID	The Tax Location Identifier for the claim manager's location.
Claim Manager	Claim Manager Territory	The territory of the claim manager's location.
Claim Manager	Claim Manager Type	The classification of the claim manager's role.
Who>Claimant		
Claimant	Claimant Birth Date	The claimant's birth date.
Claimant	Claimant Business Start Date	The calendar date when the claimant began business operations.
Claimant	Claimant City	The city where the claimant lives.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Claimant	Claimant Contact	The description of the contact method for the claimant.
Claimant	Claimant Contact Type	The contact method for the claimant.
Claimant	Claimant County	The county of the claimant's location.
Claimant	Claimant Country	The country of the claimant's location.
Claimant	Claimant District	The district of the claimant's location.
Claimant	Claimant DBA	The operational name (Doing Business As) of the claimant.
Claimant	Claimant Gender	The gender (Male or Female) of the claimant.
Claimant	Claimant Government ID Number	The government-issued identifier issued to the claimant. For example, in the USA: it is SSN or FEIN.
Claimant	Claimant Latitude	The latitude location of the claimant.
Claimant	Claimant Longitude	The longitude location of the claimant.
Claimant	Claimant Marital Status	The present marital condition (single, married, divorced, widowed) of the claimant.
Claimant	Claimant Name	The name of the claimant.
Claimant	Claimant NAICS Code	The North America Industry Class System (NAICS) Code assigned to the claimant.
Claimant	Claimant Nature of Business	The type or category of the business activities done by the Claimant.
Claimant	Claimant Number of Employees	The count of people employed by the claimant.
Claimant	Claimant Postal Code	The full postal zip code as defined by company specifications.
Claimant	Claimant Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Claimant	Claimant Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Claimant	Claimant Present Employment Start Year	The calendar year that the claimant began employment at current employer.
Claimant	Claimant Region	The geographical region of the claimant's location.
Claimant	Claimant SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the claimant.
Claimant	Claimant State	The state of the claimant's location.
Claimant	Claimant Tax Location ID	The Tax Location Identifier for the claimant's location.
Claimant	Claimant Territory	The territory of the claimant's location.
Claimant	Claimant Type	The classification of the claimant's role.
Who>Insurance Company		
Insurance Company	Insurance Company AM Best Number	The number or other identifier that identifies the insurance company AM Best Rating.
Insurance Company	Insurance Company Business Start Date	The calendar date when the insurance company began business operations.
Insurance Company	Insurance Company Contact	The description of the insurance company contact type.
Insurance Company	Insurance Company Contact Type	The contact method for the insurance company.
Insurance Company	Insurance Company Country	The country where the insurance company is located.
Insurance Company	Insurance Company County	The county where insurance company is located.
Insurance Company	Insurance Company City	The city where the insurance company is located.
Insurance Company	Insurance Company DBA	The operational name (Doing Business As) of an insurance company.
Insurance Company	Insurance Company District	The district where the insurance company is located.
Insurance Company	Insurance Company Government ID Number	The government-issued identifier issued to the insurance company. For example, in the USA it is SSN or FEIN.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Insurance Company	Insurance Company ISO Code	The insurance company's Insurance Service Office (ISO) Code.
Insurance Company	Insurance Company Latitude	The latitude location of insurance company.
Insurance Company	Insurance Company Longitude	The longitude location of insurance company
Insurance Company	Insurance Company Name	The name of the insurance company.
Insurance Company	Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Insurance Company	Insurance Company NAICS Code	The North America Industry Class System (NAICS) Code assigned to insurance company.
Insurance Company	Insurance Company Nature of Business	The type or category of the business activities done by the insurance company.
Insurance Company	Insurance Company Number of Employees	The count of people employed at the insurance company.
Insurance Company	Insurance Company Postal Code	The full postal zip code as defined by the insurance company specifications.
Insurance Company	Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Insurance Company	Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Insurance Company	Insurance Company Region	The geographical region where the insurance company is located.
Insurance Company	Insurance Company State	The state where the insurance company is located.
Insurance Company	Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insurance company.
Insurance Company	Insurance Company Type	The classification of the insurance company's primary operations.
Insurance Company	Insurance Company Territory	The territory where the insurance company is located.
Insurance Company	Insurance Company Tax Location ID	The Tax Location Identifier for the insurance company's location.
Who>Insured		

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Insured	Insured Audit Frequency	The indicator of when an insured audit is scheduled.
Insured	Insured Audit Type	The classification of the audit activities conducted on insured.
Insured	Insured Birth Date	The calendar date when insured was born.
Insured	Insured Business Start Date Identifier	The calendar date when the insured business operations began.
Insured	Insured City	The name of the city in the address
Insured	Insured Contact	The description of the insured's contact type.
Insured	Insured Contact Type	The contact method for the insured.
Insured	Insured County	The county in the address.
Insured	Insured Country	The country code in the address.
Insured	Insured Credit Score	The code or number that represents the insured credit rating score.
Insured	Insured DBA	The operational name (Doing Business As) of an insured's business.
Insured	Insured Gender	The gender (Male or Female) of the insured.
Insured	Insured Government Identification Number	The government-issued identifier issued to the insured. For example, in the USA it is SSN or FEIN.
Insured	Insured Latitude	The latitude location of the insured's address.
Insured	Insured Longitude	The longitude location of the insured location.
Insured	Insured Marital Status	The present marital condition (single, married, divorced, widowed) of the insured.
Insured	Insured Name	The full name of the insured.
Insured	Insured NAICS Code	The North America Industry Class System (NAICS) Code assigned to insured.
Insured	Insured Nature of Business	The type or category of the business activities done by the insured.
Insured	Insured Number of Employees	The count of people employed by insured.
Insured	Insured Postal Code	The full postal zip code as defined by company specifications.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Insured	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code
Insured	Insured Postal SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Insured	Insured Present Employment Start Year	The calendar year that the insured began working for their current employer.
Insured	Insured Prior Insurance Company	Name of insurance company that last provided insurance prior to policy inception.
Insured	Insured Region	The geographical region where insured is located.
Insured	Insured Report Period	The description of the timeframe of activities considered in an insured report
Insured	Insured Risk Grade	This code represents the AM Best or company defined risk grade for insured.
Insured	Insured SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insured.
Insured	Insured State	The state of the insured's location.
Insured	Insured Tax Location Identifier	The Tax Location Identifier for the insured's location.
Insured	Insured Territory	The territory of the insured's location.
Insured	Insured Type	The type of entity that contracted with insurance company to obtain a policy.
Insured	Policyholder Name	The name of the insured.
Who>Parent Insurance Company		
Parent Insurance Company	Parent Insurance Company AM Best Number	The number or other identifier that identifies the parent insurance company AM Best Rating.
Parent Insurance Company	Parent Insurance Company Business Start Date	The calendar date when the parent insurance company began business operations.
Parent Insurance Company	Parent Insurance Company City	The city where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Contact	The description of the parent insurance company contact type.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Parent Insurance Company	Parent Insurance Company Contact Type	The contact method for the parent insurance company.
Parent Insurance Company	Parent Insurance Company County	The county where parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Country	The country where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company DBA	The operational name (Doing Business As) of an parent insurance company.
Parent Insurance Company	Parent Insurance Company District	The district where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Government ID Number	The government-issued identifier issued to the parent insurance company. For example, in the USA it is SSN or FEIN.
Parent Insurance Company	Parent Insurance Company ISO Code	The parent insurance company's Insurance Service Office (ISO) Code.
Parent Insurance Company	Parent Insurance Company Latitude	The latitude location of parent insurance company.
Parent Insurance Company	Parent Insurance Company Longitude	The longitude location of insurance company
Parent Insurance Company	Parent Insurance Company Name	The name of the parent insurance company.
Parent Insurance Company	Parent Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Parent Insurance Company	Parent Insurance Company NAICS Code	The North America Industry Class System (NAICS) code assigned to parent insurance company.
Parent Insurance Company	Parent Insurance Company Nature of Business	The type or category of the business activities done by the parent insurance company.
Parent Insurance Company	Parent Insurance Company Number of Employees	The count of people employed at the parent insurance company.
Parent Insurance Company	Parent Insurance Company Postal Code	The full postal zip code as defined by the parent insurance company specifications.
Parent Insurance Company	Parent Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Parent Insurance Company	Parent Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Parent Insurance Company	Parent Insurance Company Region	The geographical region where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the parent insurance company.
Parent Insurance Company	Parent Insurance Company State	The state where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Tax Location ID	The Tax Location Identifier for the parent insurance company's location.
Parent Insurance Company	Parent Insurance Company Territory	The territory where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Type	The classification of the parent insurance company's primary operations.
Who>Producer		
Producer	Producer Birth Date	The calendar date that details when is a producer's date of birth.
Producer	Producer Business Start Date	The calendar date when the producer began business operations.
Producer	Producer City	The city where the producer is located.
Producer	Producer Contact	The description of a producer's contact method.
Producer	Producer Contact Type	The contact method for a producer.
Producer	Producer County	The county where the producer is located.
Producer	Producer Country	The country where the producer is located.
Producer	Producer DBA	The operational name (Doing Business As) of a producer's business
Producer	Producer District	The district where the producer is located.
Producer	Producer Effective Date	The calendar date the producer appointment begins.
Producer	Producer Gender	The gender (Male or Female) of the producer.
Producer	Producer Government Identification Number	The government-issued identifier issued to the producer. For example, in the USA it is SSN or FEIN.
Producer	Producer Latitude	The latitude location of the producer.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Producer	Producer Longitude	The longitude location of the producer.
Producer	Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the producer.
Producer	Producer Name	The full name of the producer.
Producer	Producer NAICS Code	North America Industry Class System (NAICS) Code issued to producer.
Producer	Producer Nature of Business	The type or category of the business activities done by the producer.
Producer	Producer Number of Employees	The count of people employed by producer.
Producer	Producer Postal Code	The full postal zip code as defined by company specifications.
Producer	Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Producer	Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Producer	Producer Present Employment Start Year	The year when the producer began working for their current employer.
Producer	Producer Region	The geographical region where producer is located.
Producer	Producer Relationship Code	The code that identifies the producer Relationship.
Producer	Producer State	The state where producer is located.
Producer	Producer State License Number	The government-issued license number issued to the producer.
Producer	Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the producer.
Producer	Producer Tax Location ID	The Tax Location Identifier for the producer's location
Producer	Producer Territory	The territory where producer is located
Producer	Producer Type	This code represents the producer type.
Who>Reinsurance Company		

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company Business Start Date	The calendar date when the reinsurance company began business operations.
Reinsurance Company	Reinsurance Company Contract	The description of the reinsurance company contract.
Reinsurance Company	Reinsurance Company Contact Type	The contact method for reinsurance company.
Reinsurance Company	Reinsurance Company County	The county where reinsurance company is located.
Reinsurance Company	Reinsurance Company Country	The country where reinsurance company is located.
Reinsurance Company	Reinsurance Company City	The city where reinsurance company is located.
Reinsurance Company	Reinsurance Company DBA	The operational name (Doing Business As) of a reinsurance company.
Reinsurance Company	Reinsurance Company District	District where reinsurance company is located.
Reinsurance Company	Reinsurance Company Latitude	The latitude location of reinsurance company.
Reinsurance Company	Reinsurance Company Longitude	The longitude location of reinsurance company.
Reinsurance Company	Reinsurance Company NAICS Code	North America Industry Class System (NAICS) Code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company Name	The name of the reinsurance company.
Reinsurance Company	Reinsurance Company Nature of Business	The type or category of the business activities done by the reinsurance company.
Reinsurance Company	Reinsurance Company Number	Identifier assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company Number of Employees	The count of people employed by the reinsurance company.
Reinsurance Company	Reinsurance Company Postal Code	The full postal zip code as defined by company specifications.
Reinsurance Company	Reinsurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company Postal Code SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Reinsurance Company	Reinsurance Company Region	The geographical region of reinsurance company.
Reinsurance Company	Reinsurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company State	The state where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Tax Location Identifier	The Tax Location Identifier of the reinsurance company's location.
Reinsurance Company	Reinsurance Company Territory	The territory where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Type Code	The code that identifies reinsurance company type.
Who>Sub Producer		
Sub Producer	Sub Producer Birth Date	The calendar date that details when is a sub producer's Date of Birth.
Sub Producer	Sub Producer Business Start Date	The calendar date when the sub producer began business operations.
Sub Producer	Sub Producer City	The city where the sub producer is located.
Sub Producer	Sub Producer Contact	The description of a sub producer's contact method.
Sub Producer	Sub Producer Contact Type	The contact method for a sub producer.
Sub Producer	Sub Producer County	The county where the sub producer is located.
Sub Producer	Sub Producer Country	The country where the sub producer is located.
Sub Producer	Sub Producer DBA	The operational name (Doing Business As) of a sub producer's business.
Sub Producer	Sub Producer District	The district where the sub producer is located.
Sub Producer	Sub Producer Effective Date	The calendar date the sub producer appointment begins.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Sub Producer	Sub Producer Gender	The gender (Male or Female) of the sub producer.
Sub Producer	Sub Producer Government ID Number	The government-issued identifier issued to the sub producer. For example, in the USA it is SSN or FEIN.
Sub Producer	Sub Producer Latitude	The latitude location of sub producer.
Sub Producer	Sub Producer Longitude	The longitude location of sub producer.
Sub Producer	Sub Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the sub producer.
Sub Producer	Sub Producer Name	The full name of the sub producer.
Sub Producer	Sub Producer NAICS Code	The North America Industry Class System (NAICS) Code issued to sub producer.
Sub Producer	Sub Producer Nature of Business	The type or category of the business activities done by the sub producer.
Sub Producer	Sub Producer Number of Employees	The count of people employed by sub producer.
Sub Producer	Sub Producer Postal Code	The full postal zip code as defined by company specifications.
Sub Producer	Sub Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Sub Producer	Sub Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Sub Producer	Sub Producer Present Employment Start Year	Year when sub producer began working for their current employer.
Sub Producer	Sub Producer Region	The geographical region where the sub producer is located.
Sub Producer	Sub Producer State	The state where the sub producer is located.
Sub Producer	Sub Producer State_LIC_Number	The government-issued license number issued to the sub producer.
Sub Producer	Sub Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the sub producer.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Sub Producer	Sub Producer Tax Location ID	The Tax Location Identifier for the sub producer's location
Sub Producer	Sub Producer Territory	The territory where the sub producer is located
Sub Producer	Sub Producer Type	This code represents the sub producer type.
Who>Supplier		
Supplier	Preferred Supplier Code	This system code identifies if a supplier is a preferred supplier.
Supplier	Preferred Supplier Type	This system code identifies preferred supplier type.
Supplier	Supplier Birth Date	The supplier's birth date.
Supplier	Supplier Business Start Date	The calendar date when the supplier began business operations.
Supplier	Supplier CATG	This system code represents the supplier category.
Supplier	Supplier City	The city where the supplier lives.
Supplier	Supplier Contact	The description of the contact method for the supplier.
Supplier	Supplier Contact Type	The contact method for the supplier.
Supplier	Supplier County	The county of the supplier's location.
Supplier	Supplier Country	The country of the supplier's location.
Supplier	Supplier DBA	The operational name (Doing Business As) of a supplier's business.
Supplier	Supplier District	The district of the supplier's location.
Supplier	Supplier Gender	The gender (Male or Female) of the claim adjuster.
Supplier	Supplier Government ID Number	The government-issued identifier issued to the claim adjuster. For example, in the USA it is SSN or FEIN.
Supplier	Supplier Latitude	The latitude location of the supplier.
Supplier	Supplier Longitude	The longitude location of the supplier.
Supplier	Supplier Marital Status	The present marital condition (single, married, divorced, widowed) of the supplier.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Supplier	Supplier NAICS Code	The North America Industry Class System (NAICS) Code issued to supplier.
Supplier	Supplier Name	The name of the supplier.
Supplier	Supplier Number	The number or other identifier that identifies the supplier.
Supplier	Supplier Number of Employees	The count of people employed by the supplier.
Supplier	Supplier Postal Code	The full postal zip code as defined by company specifications.
Supplier	Supplier Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Supplier	Supplier Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Supplier	Supplier Present Employment Start Year	The calendar year that the supplier began employment at current employer.
Supplier	Supplier Region	The geographical region of the supplier's location.
Supplier	Supplier SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the supplier.
Supplier	Supplier State	The state of the supplier's location.
Supplier	Supplier Tax Location ID	The Tax Location Identifier for the supplier's location.
Supplier	Supplier Territory	The territory of the supplier's location.
Supplier	Supplier Type	The classification of the supplier's role.
Who>Underwriter		
Underwriter	Underwriter Birth Date	The underwriter's birth date.
Underwriter	Underwriter City	The city where the underwriter lives.
Underwriter	Underwriter Contact	The description of the contact method for the underwriter.
Underwriter	Underwriter Contact Type	The contact method for the underwriter.
Underwriter	Underwriter County	The county of the underwriter's location.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Underwriter	Underwriter Country	The country of the underwriter's location.
Underwriter	Underwriter District	The district of the underwriter's location.
Underwriter	Underwriter Government ID Number	The government-issued identifier issued to the underwriter. For example, in the USA it is SSN or FEIN.
Underwriter	Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Underwriter	Underwriter Latitude	The latitude location of the underwriter.
Underwriter	Underwriter Longitude	The longitude location of the underwriter.
Underwriter	Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the underwriter.
Underwriter	Underwriter Name	The name of the underwriter.
Underwriter	Underwriter Number	The number or other identifier that identifies the underwriter.
Underwriter	Underwriter Present Employment Start Year	The calendar year that the underwriter began employment at current employer.
Underwriter	Underwriter Postal Code	The full postal zip code as defined by company specifications.
Underwriter	Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Underwriter	Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Underwriter	Underwriter Region	The geographical region of the underwriter's location.
Underwriter	Underwriter State	The state of the underwriter's location.
Underwriter	Underwriter Tax Location ID	The Tax Location Identifier for the underwriter's location.
Underwriter	Underwriter Territory	The territory of the underwriter's location.
Underwriter	Underwriter Type	The classification of the underwriter's role.
What		
What	Annual Statement Line	A code that indicates in which line of the annual statement a transaction belongs.
What	Catastrophe	This system code identifies a catastrophe. This is the number or other identifier assigned by the company.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
What	Catastrophe State	This system code identifies the state where a catastrophe occurred.
What	Class ID	This system generated number identifies the class.
What	Coverage	This field reports a code based on the type of coverage afforded on the insurance line policy. The aggregate of risks covered by the terms of a contract of insurance.
What	Currency Code	This system code identifies document currency.
What	Excess Catastrophe Code	This system code indicates that a catastrophe loss is in excess of a policyholders' retention.
What	Line of Business	A code used to represent the Line of Business.
What	Monoline/Package	A code that tells if a policy is a monoline policy or is written as part of a package.
What	National Catastrophe Code	This system code identifies the national catastrophe occurrence.
What	Line of Business	A code used to represent the Line of Business.
What	Policy Age	The number of months in policy term.
What>Billing Account		
Billing Account	Billing Account Number	The number of the account in the billing system, if different than the policy system.
Billing Account	Method of Payment	The manner that the insured makes payments on billing account balance.
Billing Account	Payment Plan	The payment schedule applied to a policy balance.
Billing Account	Payment Service	The Payment Service code identifies the type of billing plan used for the policy.
What>Catastrophe		
Catastrophe	Catastrophe Begin Date	This calendar date represents when the catastrophe started.
Catastrophe	Catastrophe Code	This system code identifies a catastrophe. This is the number or other identifier assigned by the company.
Catastrophe	Catastrophe End Date	This calendar date represents when a catastrophe ended.
Catastrophe	Catastrophe Source Code	This system code describes the source of a catastrophe.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Catastrophe	Catastrophe State	This system code identifies the state where a catastrophe occurred.
Catastrophe	Excess Catastrophe Code	This system code indicates that a catastrophe loss is in excess of a policyholders' retention.
Catastrophe	National Catastrophe Code	This system code identifies the national catastrophe occurrence.
What>Claim Transaction Code		
Claim Transaction Code	Allocated Expense Type	This system code identifies the expense allocation type in the claim transaction.
Claim Transaction Code	Average Expense Reserve Code	This system code identifies the average reserve set in the claim transaction expenses.
Claim Transaction Code	Average Reserve Code	This system code identifies the average reserve set in the claim transaction.
Claim Transaction Code	Claim Transaction Code	This system code represents what type of loss activity occurred in the claim transaction.
Claim Transaction Code	Claim Transaction Category Code	This value represents a way to combine claim transactions into similar categories.
Claim Transaction Code	Direct/Ceded/Assumed	This system code identifies the claim transaction type as being direct, ceded, or assumed.
Claim Transaction Code	System Claim Transaction Code	This system code identifies the system claim transaction.
What>Class		
Class	Class Code	A class code is a three to six character field used to classify the general characteristics of an employees function. Used for rating.
Class	Class State	The state associated with the insured address.
Class	Primary Class Code	In a situation where the class code is split into more than one useful breakout, this is the primary portion.
Class	Secondary Class Code	In a situation where the class code is split into more than one useful breakout, this is the secondary portion.
What>Coverage		
Coverage	Annual Statement Line	A code that indicates in which line of the annual statement a transaction belongs.
Coverage	Bureau Report Plan	Indicates the statistical plan code used for bureau reporting.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Coverage	Coverage	This field reports a code based on the type of coverage afforded on the insurance line policy. The aggregate of risks covered by the terms of a contract of insurance.
Coverage	Coverage Category	A way to group coverages within a line of business.
Coverage	Coverage Effective Date	The calendar date when the policy coverage begins.
Coverage	Coverage Expiration Date	The calendar date when the policy coverage ends.
Coverage	Coverage Part	An indicator of a line of business within a package policy.
Coverage	Secondary Coverage	A client defined code to further breakdown the type of coverage afforded on the insurance line policy.
Coverage	Statistical Plan	This code identifies the statistical plan for coverage.
What>Deductible		
Deductible	Deductible	The amount of loss that the policyholder is responsible to pay.
Deductible	Deductible Applies To	This code is used to identify to what the deductible applies.
Deductible	Deductible Basis	This code represents the basis applied to determine the deductible.
Deductible	Deductible Type	This code represents the deductible type that pertains to a particular policy coverage.
What>Distribution Channel		
Distribution Channel	Distribution Channel Name	The full name of the distribution channel.
Distribution Channel	Distribution Channel Number	The number or other identifier assigned to the distribution channel.
Distribution Channel	Distribution Channel Type	The classification of the activities of distribution channel.
Distribution Channel	Typical Commission Rate	The rate of commission given to a producer for a sale of a policy unless the commission rate is overridden.
What>Feature		

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Feature	Accident Injury Analysis Code	This system code summarizes the facts relating to a claim. The code can be used to indicate injuries such as body parts involved, type of injury or disease and cause of condition related to a claim.
Feature	Accident Injury Analysis Sub Code	This system code describes the loss in more detail than the accident injury analysis code and further describes such things as the object/ incident involved in the loss (i.e. machinery, wet floor, etc.).
Feature	Cause of Loss	This system code represents the condition that caused a loss to occur.
Feature	Disability Type	This system code indicates the disability type.
Feature	Injured Body Part	This system code represents an anatomical part of the insured body.
Feature	Type of Loss	This is the CSP type of loss code It includes the loss location and the loss cause.
What>Feature Status		
Feature Status	Feature Closed Date	This calendar date represents when the claim feature, defined as a subset of a claim occurrence, was closed.
Feature Status	Feature Opened Date	This calendar date represents when the claim feature, defined as a subset of a claim occurrence, was opened.
Feature Status	Feature Reclosed Date	This calendar date represents when the claim feature, defined as a subset of a claim occurrence, was reclosed.
Feature Status	Feature Reopened Date	This calendar date represents when the claim feature was opened after previous closing.
Feature Status	Feature Status	This system code identifies the current condition of the claim feature, defined as a subset of a claim occurrence.
What>Group Program		
Group Program	Group Program Anniversary Date	The calendar date that identifies the anniversary of a group program.
Group Program	Group Program Dividend Plan	The classification of the manner in which a group program dividend is paid.
Group Program	Group Program Dividend Date	The calendar date that identifies the dividend date of a group program.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Group Program	Group Program Member Count	This number identifies the group program.
Group Program	Group Program Name	The name of the program, other than state or national, that a group of policies are associated with.
Group Program	Group Program Natural Name	The name of the national program that a group of policies are associated with.
Group Program	Group Program Original Date	The calendar date that identifies group program Origination Date.
Group Program	Group Program State	The state associated with group program.
Group Program	Group Program Status	The description of the current condition of a program with which a group of policies is associated.
Group Program	Group Program Type	The type of program that is represented.
What>Limit		
Limit	First Limit	The first limit of coverage for each type of coverage.
Limit	Full Limit	The limit associated with the coverage code.
Limit	Limit Applies To	A code identifying to what the limit applies.
Limit	Limit Basis	The code for basis to which the limit applies.
Limit	Limit Type	The code that describes a limit.
Limit	Second Limit	The second limit of coverage for each type of coverage.
Limit	Third Limit	The third limit of coverage for each type of coverage.
Limit	Valuation Code	This code reports the valuation of the limit of coverage for each type of coverage.
What>Line of Business		
Line of Business	Company Product Code	A company-unique code indicating the product classification of this policy. The source of this code list is the individual carriers.
Line of Business	Line of Business	A code used to represent the Line of Business.
Line of Business	Line of Business Sub Code	A further breakdown of Line of Business. May be defined by company.
Line of Business	Line of Business System Code	This system code represents a system line of business.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Line of Business	Personal or Commercial	A code used to identify a policy as personal or commercial lines.
What>Litigation		
Litigation	Alternative Dispute Resolution	This system code identifies the outcome of using an intermediary for dispute settlement.
Litigation	Compensatory Demand Amount	This number represents the amount of requested compensatory damages.
Litigation	Compensatory Offer Amount	This number represents the amount of offered compensatory damages.
Litigation	Disclosure Date	This date represents the calendar date of disclosure of information related to litigation.
Litigation	Litigation Amount	This number represents the amount of litigation case.
Litigation	Litigation Close Date	This calendar date represents when litigation case was closed.
Litigation	Litigation County	This system code describes a litigation county.
Litigation	Litigation Disposition	This system code identifies the litigation disposition.
Litigation	Litigation Opened Date	This calendar date represents when litigation case was filed in court.
Litigation	Litigation State	This system code identifies the litigation state.
Litigation	Trial Date	This calendar date represents the when the trial is scheduled, or has already occurred.
What>Reinsurance Contract		
Reinsurance Contract	Reinsurance Contract Begin Date	The calendar date that identifies when reinsurance contract begins.
Reinsurance Contract	Reinsurance Contract Ceded Loss Ratio	The ratio of losses and loss adjustment expenses incurred to premiums earned for the portion of exposure that is transferred to a reinsurance company.
Reinsurance Contract	Reinsurance Contract Category	The category of the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Cession Number	The unique identifier of the reinsurance contract cession.
Reinsurance Contract	Reinsurance Contract Certificate Number	The unique identifier assigned to the reinsurance contract certificate.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Reinsurance Contract	Reinsurance Contract End Date	The calendar date reinsurance contract ends.
Reinsurance Contract	Reinsurance Contract Facultative Commission Percent	The percentage commission paid to Reinsurer.
Reinsurance Contract	Reinsurance Contract Layer	The reinsurance contract layer describes the amount of reinsurance provided in the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Type	The contract type for reinsurance contract dimension.
Reinsurance Contract	Reinsurance Contract Treaty Number	A unique identifier assigned to a reinsurance contract treaty.
When		
When	Calendar Month	The numeric representation of the month (1-12).
When	Calendar Month Name	The name of a month (Jan, Feb, etc.).
When	Calendar Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Calendar Quarter Name	The name of a quarter (Q1 - Q4).
When	Calendar Year	The one-year period that begins on January 1 and ends on December 31.
When	Fiscal Month	The numeric representation of the month (1-12).
When	Fiscal Month Name	The name of a month (Jan, Feb, etc.).
When	Fiscal Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Fiscal Quarter Name	The name of a quarter (Q1 - Q4).
When	Fiscal Year	The year commencing with the effective date of the insurance policy or with an anniversary of that date.
Where		
Where	Insured City	The name of the city in the address.
Where	Insured Country	The country code in the address.
Where	Insured County	The county in the address.
Where	Insured District	The geographical district where the insured is located.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Where	Insured Latitude	The latitude location of the insured's address.
Where	Insured Longitude	The longitude location of the insured's address.
Where	Insured Postal Code	The full postal zip code as defined by company specifications.
Where	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Insured Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Where	Insured Region	The geographical region where insured is located.
Where	Insured State	The state of the insured's location.
Where	Insured Territory	The territory of the insured's location.
Where	Location of Loss City	The city where the loss occurred.
Where	Location of Loss Country	The country where the loss occurred.
Where	Location of Loss County	The county where the loss occurred.
Where	Location of Loss District	The district where the loss occurred.
Where	Location of Loss Latitude	The latitude location where the loss occurred.
Where	Location of Loss Longitude	The longitude location where the loss occurred.
Where	Location of Loss Postal Code	The full postal zip code as defined by company specifications.
Where	Location of Loss Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Location of Loss Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code. This is the sub code of the location where the loss occurred.
Where	Location of Loss Region	The geographical region where a loss occurred.
Where	Location of Loss State	The state where a loss occurred.
Where	Location of Loss Tax Location ID	The Tax Location Identifier of the location where a loss occurred.
Where	Location of Loss Territory	The territory where a loss occurred.
Additional Filters>Policy Detail		
Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Policy Detail	Cancel Reason	The system code describes the reason for a cancellation.
Policy Detail	Exposure Basis	The denomination in which the exposure units are expressed.
Policy Detail	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
Policy Detail	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
Policy Detail	Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
Policy Detail	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
Policy Detail	Package Discount Percent	The percentage of premium waived when Package Discount applies.
Policy Detail	Package Modification Assignment Code	This code indicates the package modification assignment.
Policy Detail	Package Modification Assignment Factor	The percentage of premium waived as a result of packaging coverages.
Policy Detail	Policy Age	The number of months in policy term.
Policy Detail	Policy Cancellation Date	The date a policy or coverage was terminated by cancellation.
Policy Detail	Policy Effective Date	The effective date of the policy related to this transaction.
Policy Detail	Policy Expiration Date	The expiration date of the policy related to this transaction.
Policy Detail	Policy Number	A unique client-assigned number identifying each policy.
Policy Detail	Policy Type	The description of the type of coverage included in a policy.
Policy Detail	Policy Type Category	The categorization of the type of coverage a policy includes.
Policy Detail	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
Policy Detail	Policyholder Name	The name of the insured.
Policy Detail	Premium Basis	The basis to which rates are applied to determine premiums.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Policy Detail	Renewal Term	The length of the renewal policy period (term) in months.
Policy Detail	Supporting Business Discount Percent	The percentage of premium waived when supporting business discount applies.
Policy Detail	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.
Additional Filters>Claim Detail		
Claim Detail	Case Made Retroactive Date	The calendar date that the claim case was made retroactive.
Claim Detail	Case Management Assigned Date	The calendar date that claim management is assigned to claim.
Claim Detail	Claim Closed Date	The date on which the insurance company closed the claim.
Claim Detail	Claim Number	A unique number assigned to each claim.
Claim Detail	Claim Opened Date	The date a claim was opened.
Claim Detail	Claim Reclosed Date	The date a claim was closed after being reopened.
Claim Detail	Claim Reopened Date	The date on which a closed claim was changed to open status.
Claim Detail	Claim Report Class Code	The code describes the class code report class applicable to the claim, regardless of the class codes on the policy.
Claim Detail	Claim Reported By	The source of claim report.
Claim Detail	Claim Reported Date	The date the insured filed the claim with the insurance carrier.
Claim Detail	Claim Status	The process condition of a claim.
Claim Detail	Claims Made Basis Code	The code identifies whether or not the claims made basis is being used for reporting of claims.
Claim Detail	First Claim Contact Date	The calendar date that the claimant was first contacted by the insuring company or its representative.
Claim Detail	First Claim Payment Date	The calendar date when the first payment was made on a claim.
Claim Detail	Fraud Claim Code	The code to indicate potential fraudulent claim based on adjusters' investigation.

Table 16: Claim Transaction (Continued)

Category	Filter	Description
Claim Detail	Last Claim Payment Date	The calendar date when the last claim payment was issued.
Claim Detail	Last Salvage Payment Date	The calendar date when the last payment was made associated with salvage.
Claim Detail	Last Subrogation Payment Date	The calendar date when last subrogation payment was received.
Claim Detail	Loss Date	The date on which an accident or loss occurred regardless of when the claim was filed.
Claim Detail	Loss Month	The month that the claim loss period began.
Claim Detail	Loss Quarter	The quarter that the claim loss period began.
Claim Detail	Loss Time	The number that identifies the time a loss occurred.
Claim Detail	Loss Year	The year that the claim loss period began.
Claim Detail	Number of Rental Days	The total count of days a replacement item is rented.
Claim Detail	Number of Repair Days	The total count of days required to repair an item.
Claim Detail	Number of Storage Days	The total count of days an item is stored.

COMMERCIAL AUTO

Table 17: Commercial Auto

Category	Filter	Description
Who	Assistant Underwriter	The name of the assistant underwriter.
Who	Assistant Underwriter Number	A unique number assigned to an assistant underwriter.
Who	Company Name	The name of the company associated with the policy.
Who	Company Type	A code used to represent the type of company.
Who	Distribution Channel Name	The name used to represent the distribution channel.
Who	Distribution Channel Type	A code used to represent the type of distribution channel.
Who	Group Program	The code used to represent the program that a group of policies are associated with.
Who	Group Program Type	The type of program that is represented.
Who	Producer Name	The name of the producer.
Who	Producer Number	The number used to represent the producer.
Who	Producer Type	The code used to represent the producer type.
Who	Sub Producer Name	The name of an individual producer within an insurance agency.
Who	Sub Producer Number	The number used to represent the sub producer.
Who	Sub Producer Type	The code used to represent the sub producer type.
Who	Underwriter Name	The name of the underwriter.
Who	Underwriter Number	A unique number assigned to an underwriter.
Who>Assistant Underwriter		
Assistant Underwriter	Assistant Underwriter Birth Date	The assistant underwriter's birth date.
Assistant Underwriter	Assistant Underwriter City	The city where the assistant underwriter lives.
Assistant Underwriter	Assistant Underwriter Contact	The description of the contact method for the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Contact Type	The contact method for the assistant underwriter.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter Country	The country of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter County	The county of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter District	The district of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Government ID Number	The government-issued identifier issued to the assistant underwriter. For example, in the USA it is SSN or FEIN.
Assistant Underwriter	Assistant Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Latitude	The latitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Longitude	The longitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Name	The name of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Number	The number or other identifier that identifies the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Present Employment Start Year	The calendar year that the assistant underwriter began employment at current employer.
Assistant Underwriter	Assistant Underwriter Postal Code	The full postal zip code as defined by company specifications.
Assistant Underwriter	Assistant Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Assistant Underwriter	Assistant Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Assistant Underwriter	Assistant Underwriter Region	The geographical region of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter State	The state of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Type	The classification of the assistant underwriter's role.
Assistant Underwriter	Assistant Underwriter Territory	The territory of the assistant underwriter's location.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter Tax Location ID	The Tax Location Identifier for the assistant underwriter's location.
Who>Insurance Company		
Insurance Company	Insurance Company AM Best Number	The number or other identifier that identifies the insurance company AM Best Rating.
Insurance Company	Insurance Company Business Start Date	The calendar date when the insurance company began business operations.
Insurance Company	Insurance Company Contact	The description of the insurance company contact type.
Insurance Company	Insurance Company Contact Type	The contact method for the insurance company.
Insurance Company	Insurance Company Country	The country where the insurance company is located.
Insurance Company	Insurance Company County	The county where insurance company is located.
Insurance Company	Insurance Company City	The city where the insurance company is located.
Insurance Company	Insurance Company DBA	The operational name (Doing Business As) of an insurance company.
Insurance Company	Insurance Company District	The district where the insurance company is located.
Insurance Company	Insurance Company Government ID Number	The government-issued identifier issued to the insurance company. For example, in the USA it is SSN or FEIN.
Insurance Company	Insurance Company ISO Code	The insurance company's Insurance Service Office (ISO) Code.
Insurance Company	Insurance Company Latitude	The latitude location of insurance company.
Insurance Company	Insurance Company Longitude	The longitude location of insurance company
Insurance Company	Insurance Company Name	The name of the insurance company.
Insurance Company	Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Insurance Company	Insurance Company NAICS Code	The North America Industry Class System (NAICS) Code assigned to insurance company.
Insurance Company	Insurance Company Nature of Business	The type or category of the business activities done by the insurance company.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Insurance Company	Insurance Company Number of Employees	The count of people employed at the insurance company.
Insurance Company	Insurance Company Postal Code	The full postal zip code as defined by the insurance company specifications.
Insurance Company	Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Insurance Company	Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Insurance Company	Insurance Company Region	The geographical region where the insurance company is located.
Insurance Company	Insurance Company State	The state where the insurance company is located.
Insurance Company	Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insurance company.
Insurance Company	Insurance Company Type	The classification of the insurance company's primary operations.
Insurance Company	Insurance Company Territory	The territory where the insurance company is located.
Insurance Company	Insurance Company Tax Location ID	The Tax Location Identifier for the insurance company's location.
Who>Insured		
Insured	Insured Audit Frequency	The indicator of when an insured audit is scheduled.
Insured	Insured Audit Type	The classification of the audit activities conducted on insured.
Insured	Insured Birth Date	The calendar date when insured was born.
Insured	Insured Business Start Date Identifier	The calendar date when the insured business operations began.
Insured	Insured City	The name of the city in the address
Insured	Insured Contact	The description of the insured's contact type.
Insured	Insured Contact Type	The contact method for the insured.
Insured	Insured County	The county in the address.
Insured	Insured Country	The country code in the address.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Insured	Insured Credit Score	The code or number that represents the insured credit rating score.
Insured	Insured DBA	The operational name (Doing Business As) of an insured's business.
Insured	Insured Gender	The gender (Male or Female) of the insured.
Insured	Insured Government Identification Number	The government-issued identifier issued to the insured. For example, in the USA it is SSN or FEIN.
Insured	Insured Latitude	The latitude location of the insured's address.
Insured	Insured Longitude	The longitude location of the insured location.
Insured	Insured Marital Status	The present marital condition (single, married, divorced, widowed) of the insured.
Insured	Insured Name	The full name of the insured.
Insured	Insured NAICS Code	The North America Industry Class System (NAICS) Code assigned to insured.
Insured	Insured Nature of Business	The type or category of the business activities done by the insured.
Insured	Insured Number of Employees	The count of people employed by insured.
Insured	Insured Postal Code	The full postal zip code as defined by company specifications.
Insured	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code
Insured	Insured Postal SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Insured	Insured Present Employment Start Year	The calendar year that the insured began working for their current employer.
Insured	Insured Prior Insurance Company	Name of insurance company that last provided insurance prior to policy inception.
Insured	Insured Region	The geographical region where insured is located.
Insured	Insured Report Period	The description of the timeframe of activities considered in an insured report

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Insured	Insured Risk Grade	This code represents the AM Best or company defined risk grade for insured.
Insured	Insured SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insured.
Insured	Insured State	The state of the insured's location.
Insured	Insured Tax Location Identifier	The Tax Location Identifier for the insured's location.
Insured	Insured Territory	The territory of the insured's location.
Insured	Insured Type	The type of entity that contracted with insurance company to obtain a policy.
Who>Parent Insurance Company		
Parent Insurance Company	Parent Insurance Company AM Best Number	The number or other identifier that identifies the parent insurance company AM Best Rating.
Parent Insurance Company	Parent Insurance Company Business Start Date	The calendar date when the parent insurance company began business operations.
Parent Insurance Company	Parent Insurance Company City	The city where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Contact	The description of the parent insurance company contact type.
Parent Insurance Company	Parent Insurance Company Contact Type	The contact method for the parent insurance company.
Parent Insurance Company	Parent Insurance Company County	The county where parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Country	The country where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company DBA	The operational name (Doing Business As) of an parent insurance company.
Parent Insurance Company	Parent Insurance Company District	The district where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Government ID Number	The government-issued identifier issued to the parent insurance company. For example, in the USA it is SSN or FEIN.
Parent Insurance Company	Parent Insurance Company ISO Code	The parent insurance company's Insurance Service Office (ISO) Code.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Parent Insurance Company	Parent Insurance Company Latitude	The latitude location of parent insurance company.
Parent Insurance Company	Parent Insurance Company Longitude	The longitude location of insurance company
Parent Insurance Company	Parent Insurance Company Name	The name of the parent insurance company.
Parent Insurance Company	Parent Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Parent Insurance Company	Parent Insurance Company NAICS Code	The North America Industry Class System (NAICS) code assigned to parent insurance company.
Parent Insurance Company	Parent Insurance Company Nature of Business	The type or category of the business activities done by the parent insurance company.
Parent Insurance Company	Parent Insurance Company Number of Employees	The count of people employed at the parent insurance company.
Parent Insurance Company	Parent Insurance Company Postal Code	The full postal zip code as defined by the parent insurance company specifications.
Parent Insurance Company	Parent Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Parent Insurance Company	Parent Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Parent Insurance Company	Parent Insurance Company Region	The geographical region where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the parent insurance company.
Parent Insurance Company	Parent Insurance Company State	The state where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Tax Location ID	The Tax Location Identifier for the parent insurance company's location.
Parent Insurance Company	Parent Insurance Company Type	The classification of the parent insurance company's primary operations.
Parent Insurance Company	Parent Insurance Company Territory	The territory where the parent insurance company is located.
Who>Producer		

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Producer	Producer Birth Date	The calendar date that details when is a producer's date of birth.
Producer	Producer Business Start Date	The calendar date when the producer began business operations.
Producer	Producer City	The city where the producer is located.
Producer	Producer Contact	The description of a producer's contact method.
Producer	Producer Contact Type	The contact method for a producer.
Producer	Producer County	The county where the producer is located.
Producer	Producer Country	The country where the producer is located.
Producer	Producer DBA	The operational name (Doing Business As) of a producer's Business
Producer	Producer District	The district where the producer is located.
Producer	Producer Effective Date	The calendar date the producer appointment begins.
Producer	Producer Gender	The gender (Male or Female) of the producer.
Producer	Producer Government Identification Number	The government-issued identifier issued to the producer. For example, in the USA it is SSN or FEIN.
Producer	Producer Latitude	The latitude location of the producer.
Producer	Producer Longitude	The longitude location of the producer.
Producer	Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the producer.
Producer	Producer Name	The full name of the producer.
Producer	Producer NAICS Code	North America Industry Class System (NAICS) Code issued to producer.
Producer	Producer Nature of Business	The type or category of the business activities done by the producer.
Producer	Producer Number of Employees	The count of people employed by producer.
Producer	Producer Postal Code	The full postal zip code as defined by company specifications.
Producer	Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Producer	Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Producer	Producer Present Employment Start Year	The year when the producer began working for their current employer.
Producer	Producer Region	The geographical region where producer is located.
Producer	Producer Relationship Code	The code that identifies the producer Relationship.
Producer	Producer State	The state where producer is located.
Producer	Producer State License Number	The government-issued license number issued to the producer.
Producer	Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the producer.
Producer	Producer Tax Location ID	The Tax Location Identifier for the producer's location
Producer	Producer Territory	The territory where producer is located
Producer	Producer Type	This code represents the producer type.
Who>Reinsurance Company		
Reinsurance Company	Reinsurance Company Business Start Date	The calendar date when the reinsurance company began business operations.
Reinsurance Company	Reinsurance Company Contract	The description of the reinsurance company contract.
Reinsurance Company	Reinsurance Company Contact Type	The contact method for reinsurance company.
Reinsurance Company	Reinsurance Company County	The county where reinsurance company is located.
Reinsurance Company	Reinsurance Company Country	The country where reinsurance company is located.
Reinsurance Company	Reinsurance Company City	The city where reinsurance company is located.
Reinsurance Company	Reinsurance Company DBA	The operational name (Doing Business As) of a reinsurance company.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company District	District where reinsurance company is located.
Reinsurance Company	Reinsurance Company Latitude	The latitude location of reinsurance company.
Reinsurance Company	Reinsurance Company Longitude	The longitude location of reinsurance company.
Reinsurance Company	Reinsurance Company NAICS Code	North America Industry Class System (NAICS) Code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company Name	The name of the reinsurance company.
Reinsurance Company	Reinsurance Company Nature of Business	The type or category of the business activities done by the reinsurance company.
Reinsurance Company	Reinsurance Company Number	Identifier assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company Number of Employees	The count of people employed by the reinsurance company.
Reinsurance Company	Reinsurance Company Postal Code	The full postal zip code as defined by company specifications.
Reinsurance Company	Reinsurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Reinsurance Company	Reinsurance Company Postal Code SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Reinsurance Company	Reinsurance Company Region	The geographical region of reinsurance company.
Reinsurance Company	Reinsurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company State	The state where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Tax Location Identifier	The Tax Location Identifier of the reinsurance company's location.
Reinsurance Company	Reinsurance Company Territory	The territory where the reinsurance company is located.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company Type Code	The code that identifies reinsurance company type.
Who>Sub Producer		
Sub Producer	Sub Producer Birth Date	The calendar date that details when is a sub producer's Date of Birth.
Sub Producer	Sub Producer Business Start Date	The calendar date when the sub producer began business operations.
Sub Producer	Sub Producer City	The city where the sub producer is located.
Sub Producer	Sub Producer Contact	The description of a sub producer's contact method.
Sub Producer	Sub Producer Contact Type	The contact method for a sub producer.
Sub Producer	Sub Producer County	The county where the sub producer is located.
Sub Producer	Sub Producer Country	The country where the sub producer is located.
Sub Producer	Sub Producer DBA	The operational name (Doing Business As) of a sub producer's business.
Sub Producer	Sub Producer District	The district where the sub producer is located.
Sub Producer	Sub Producer Effective Date	The calendar date the sub producer appointment begins.
Sub Producer	Sub Producer Gender	The gender (Male or Female) of the sub producer.
Sub Producer	Sub Producer Government ID Number	The government-issued identifier issued to the sub producer. For example, in the USA it is SSN or FEIN.
Sub Producer	Sub Producer Latitude	The latitude location of sub producer.
Sub Producer	Sub Producer Longitude	The longitude location of sub producer.
Sub Producer	Sub Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the sub producer.
Sub Producer	Sub Producer Name	The full name of the sub producer.
Sub Producer	Sub Producer NAICS Code	The North America Industry Class System (NAICS) Code issued to sub producer.
Sub Producer	Sub Producer Nature of Business	The type or category of the business activities done by the sub producer.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Sub Producer	Sub Producer Number of Employees	The count of people employed by sub producer.
Sub Producer	Sub Producer Postal Code	The full postal zip code as defined by company specifications.
Sub Producer	Sub Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Sub Producer	Sub Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Sub Producer	Sub Producer Present Employment Start Year	Year when sub producer began working for their current employer.
Sub Producer	Sub Producer Region	The geographical region where the sub producer is located.
Sub Producer	Sub Producer State	The state where the sub producer is located.
Sub Producer	Sub Producer State_LIC_Number	The government-issued license number issued to the sub producer.
Sub Producer	Sub Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the sub producer.
Sub Producer	Sub Producer Tax Location ID	The Tax Location Identifier for the sub producer's location
Sub Producer	Sub Producer Territory	The territory where the sub producer is located
Sub Producer	Sub Producer Type	This code represents the sub producer type Standard Code
Who>Underwriter		
Underwriter	Underwriter Birth Date	The underwriter's birth date.
Underwriter	Underwriter City	The city where the underwriter lives.
Underwriter	Underwriter Contact	The description of the contact method for the underwriter.
Underwriter	Underwriter Contact Type	The contact method for the underwriter.
Underwriter	Underwriter County	The county of the underwriter's location.
Underwriter	Underwriter Country	The country of the underwriter's location.
Underwriter	Underwriter District	The district of the underwriter's location.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Underwriter	Underwriter Government ID Number	The government-issued identifier issued to the underwriter. For example, in the USA it is SSN or FEIN.
Underwriter	Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Underwriter	Underwriter Latitude	The latitude location of the underwriter.
Underwriter	Underwriter Longitude	The longitude location of the underwriter.
Underwriter	Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the underwriter.
Underwriter	Underwriter Name	The name of the underwriter.
Underwriter	Underwriter Number	The number or other identifier that identifies the underwriter.
Underwriter	Underwriter Present Employment Start Year	The calendar year that the underwriter began employment at current employer.
Underwriter	Underwriter Postal Code	The full postal zip code as defined by company specifications.
Underwriter	Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Underwriter	Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Underwriter	Underwriter Region	The geographical region of the underwriter's location.
Underwriter	Underwriter State	The state of the underwriter's location.
Underwriter	Underwriter Tax Location ID	The Tax Location Identifier for the underwriter's location.
Underwriter	Underwriter Territory	The territory of the underwriter's location.
Underwriter	Underwriter Type	The classification of the underwriter's role.
What		
What	Currency Code	This system code identifies document currency.
What>Basis		
Basis	Exposure Basis	The exposure basis is the denomination in which the exposure units are expressed.
Basis	Premium Basis	A code used to identify the type of rating scale used.
What>Billing Account		

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Billing Account	Billing Account Number	The number of the account in the billing system, if different than the policy system.
Billing Account	Method of Payment	The manner that the insured makes payments on billing account balance.
Billing Account	Payment Plan	The payment schedule applied to a policy balance.
Billing Account	Payment Service	The Payment Service code identifies the type of billing plan used for the policy.
What>Class		
Class	Class Code	A class code is a three to six character field used to classify the general characteristics of an employees function. Used for rating.
Class	Class State	The state associated with the insured address.
Class	Primary Class Code	In a situation where the class code is split into more than one useful breakout, this is the primary portion.
Class	Secondary Class Code	In a situation where the class code is split into more than one useful breakout, this is the secondary portion.
What>Coverage		
Coverage	Annual Statement Line	A code that indicates in which line of the annual statement a transaction belongs.
Coverage	Bureau Report Plan	Indicates the statistical plan code used for bureau reporting.
Coverage	Coverage	This field reports a code based on the type of coverage afforded on the insurance line policy. The aggregate of risks covered by the terms of a contract of insurance.
Coverage	Coverage Category	A way to group coverages within a line of business.
Coverage	Coverage Effective Date	The calendar date when the policy coverage begins.
Coverage	Coverage Expiration Date	The calendar date when the policy coverage ends.
Coverage	Coverage Part	An indicator of a line of business within a package policy.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Coverage	Secondary Coverage	A client defined code to further breakdown the type of coverage afforded on the insurance line policy.
Coverage	Statistical Plan	This code identifies the statistical plan for coverage.
What>Commercial Vehicle		
Commercial Vehicle	Business Use Class	Based on the type of operation, businesses are classified as service, retail or commercial.
Commercial Vehicle	Gross/Combined Vehicle Weight	The weight the vehicle is capable of carrying, including that of any vehicle it is towing.
Commercial Vehicle	Make of Vehicle	The description of the automobile manufacturer.
Commercial Vehicle	Model	The model name assigned by the manufacturer of the commercial vehicle.
Commercial Auto Filters	Vehicle Body Type	A code indicating the body type of this vehicle. This element uses the ACORD Vehicle BodyTypecode list.
Commercial Auto Filters	Vehicle Symbol	The cost symbol that represents a value for the private passenger vehicle.
Commercial Vehicle	Year	This is the model year of the vehicle. The model gives the description of the car and/or its manufacturer.
What>Commercial Driver		
Commercial Driver	Driver Type	A code describing the type of driver.
Commercial Driver	Gender	The gender of the claimant.
Commercial Driver	Licensed Year	A code that identifies the intervals at which audits are performed at the insured company.
What>Commercial Policy Filters		
Commercial Policy Filters	Audit Frequency	A code that identifies the intervals at which audits are performed at the insured company.
Commercial Policy Filters	Audit Type	An indication of what type of audit will be performed when the entity is audited.
Commercial Policy Filters	Business Start Year	The first year that the business was in operation.
Commercial Policy Filters	NAICS Code	The North America Industry Class System used to group types of business.
Commercial Policy Filters	Nature of Business	The type of business conducted by the operation.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Commercial Policy Filters	Number of Employees	The number of employees on the staff of the employer.
Commercial Policy Filters	Policy Age	The number of months in policy term.
Commercial Policy Filters	Reporting Period	The frequency of reports sent to the company for reporting form coverage.
Commercial Policy Filters	Risk Grade	The code that represents the AM Best or company defined risk grade.
Commercial Policy Filters	SIC Code	The Standard Industrial Classification assigned to the company.
What>Deductible		
Deductible	Deductible	The amount of loss that the policyholder is responsible to pay.
Deductible	Deductible Applies To	This code is used to identify to what the deductible applies.
Deductible	Deductible Basis	This code represents the basis applied to determine the deductible.
Deductible	Deductible Type	This code represents the deductible type that pertains to a particular policy coverage.
What>Distribution Channel		
Distribution Channel	Distribution Channel Name	The full name of the distribution channel.
Distribution Channel	Distribution Channel Number	The number or other identifier assigned to the distribution channel.
Distribution Channel	Distribution Channel Type	The classification of the activities of distribution channel.
Distribution Channel	Typical Commission Rate	The rate of commission given to a producer for a sale of a policy unless the commission rate is overridden.
What>Group Program		
Group Program	Group Program Anniversary Date	The calendar date that identifies the anniversary of a group program.
Group Program	Group Program Dividend Plan	The classification of the manner in which a group program dividend is paid.
Group Program	Group Program Dividend Date	The calendar date that identifies the dividend date of a group program.
Group Program	Group Program Member Count	This number identifies the group program.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Group Program	Group Program Name	The name of the program, other than state or national, that a group of policies are associated with.
Group Program	Group Program Natural Name	The name of the national program that a group of policies are associated with.
Group Program	Group Program Original Date	The calendar date that identifies group program Origination Date.
Group Program	Group Program Status	The description of the current condition of a program with which a group of policies is associated.
Group Program	Group Program State	The state associated with group program.
Group Program	Group Program Type	The type of program that is represented.
What>Limit		
Limit	First Limit	The first limit of coverage for each type of coverage.
Limit	Full Limit	The limit associated with the coverage code.
Limit	Limit Applies To	A code identifying to what the limit applies.
Limit	Limit Basis	The code for basis to which the limit applies.
Limit	Limit Type	The code that describes a limit.
Limit	Second Limit	The second limit of coverage for each type of coverage.
Limit	Third Limit	The third limit of coverage for each type of coverage.
Limit	Valuation Code	This code reports the valuation of the limit of coverage for each type of coverage.
What>Line of Business		
Line of Business	Company Product	A company-unique code indicating the product classification of this policy. The source of this code list is the individual carriers.
Line of Business	Line of Business	A code used to represent the Line of Business.
Line of Business	Line of Business Subcode	A further breakdown of Line of Business. May be defined by company.
Line of Business	Monoline/Package	A code that tells if a policy is a monoline policy or is written as part of a package.
Line of Business	Policy Type	An additional way to categorize policies.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Line of Business	Policy Type Category	An additional way to categorize policies based on client specifications.
What>Reinsurance Contract		
Reinsurance Contract	Reinsurance Contract Begin Date	The calendar date that identifies when reinsurance contract begins.
Reinsurance Contract	Reinsurance Contract Ceded Loss Ratio	The ratio of losses and loss adjustment expenses incurred to premiums earned for the portion of exposure that is transferred to a reinsurance company.
Reinsurance Contract	Reinsurance Contract Category	The category of the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Cession Number	The unique identifier of the reinsurance contract cession.
Reinsurance Contract	Reinsurance Contract Certificate Number	The unique identifier assigned to the reinsurance contract certificate.
Reinsurance Contract	Reinsurance Contract End Date	The calendar date reinsurance contract ends.
Reinsurance Contract	Reinsurance Contract Facultative Commission Percent	The percentage commission paid to Reinsurer.
Reinsurance Contract	Reinsurance Contract Layer	The reinsurance contract layer describes the amount of reinsurance provided in the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Type	The contract type for reinsurance contract dimension.
Reinsurance Contract	Reinsurance Contract Treaty Number	A unique identifier assigned to a reinsurance contract treaty.
When		
When	Calendar Month	The numeric representation of the month (1-12).
When	Calendar Month Name	The name of a month (Jan, Feb, etc.).
When	Calendar Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Calendar Quarter Name	The name of a quarter (Q1 - Q4).
When	Calendar Year	The one-year period that begins on January 1 and ends on December 31.
When	Fiscal Month	The numeric representation of the month (1-12).

Table 17: Commercial Auto (Continued)

Category	Filter	Description
When	Fiscal Month Name	The name of a month (Jan, Feb, etc.).
When	Fiscal Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Fiscal Quarter Name	The name of a quarter (Q1 - Q4).
When	Fiscal Year	The year commencing with the effective date of the insurance policy or with an anniversary of that date.
Where		
Where	Insured City	The name of the city in the address.
Where	Insured Country	The country code in the address.
Where	Insured County	The county in the address.
Where	Insured District	The geographical district where the insured is located.
Where	Insured Latitude	The latitude location of the insured's address.
Where	Insured Longitude	The longitude location of the insured's address.
Where	Insured Postal Code	The full postal zip code as defined by company specifications.
Where	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Insured Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Where	Insured Region	The geographical region where insured is located.
Where	Insured State	The state of the insured's location.
Where	Insured Territory	The territory of the insured's location.
Where	Location of Loss City	The city where the loss occurred.
Where	Location of Loss Country	The country where the loss occurred.
Where	Location of Loss County	The county where the loss occurred.
Where	Location of Loss District	The district where the loss occurred.
Where	Location of Loss Latitude	The latitude location where the loss occurred.
Where	Location of Loss Longitude	The longitude location where the loss occurred.
Where	Location of Loss Postal Code	The full postal zip code as defined by company specifications.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Where	Location of Loss Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Location of Loss Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code. This is the sub code of the location where the loss occurred.
Where	Location of Loss Region	The geographical region where a loss occurred.
Where	Location of Loss State	The state where a loss occurred.
Where	Location of Loss Tax Location ID	The Tax Location Identifier of the location where a loss occurred.
Where	Location of Loss Territory	The territory where a loss occurred.
Additional Filters>Claim Detail		
Claim Detail	Case Made Retroactive Date	The calendar date that the claim case was made retroactive.
Claim Detail	Case Management Assigned Date	The calendar date that claim management is assigned to claim.
Claim Detail	Claim Closed Date	The date on which the insurance company closed the claim.
Claim Detail	Claim Number	A unique number assigned to each claim.
Claim Detail	Claim Opened Date	The date a claim was opened.
Claim Detail	Claim Reclosed Date	The date a claim was closed after being reopened.
Claim Detail	Claim Reopened Date	The date on which a closed claim was changed to open status.
Claim Detail	Claim Report Class Code	The code describes the class code report class applicable to the claim, regardless of the class codes on the policy.
Claim Detail	Claim Reported By	The source of claim report.
Claim Detail	Claim Reported Date	The date the insured filed the claim with the insurance carrier.
Claim Detail	Claim Status	The process condition of a claim.
Claim Detail	Claims Made Basis Code	The code identifies whether or not the claims made basis is being used for reporting of claims.
Claim Detail	First Claim Contact Date	The calendar date that the claimant was first contacted by the insuring company or its representative.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Claim Detail	First Claim Payment Date	The calendar date when the first payment was made on a claim.
Claim Detail	Fraud Claim Code	The code to indicate potential fraudulent claim based on adjusters' investigation.
Claim Detail	Last Claim Payment Date	The calendar date when the last claim payment was issued.
Claim Detail	Last Salvage Payment Date	The calendar date when the last payment was made associated with salvage.
Claim Detail	Last Subrogation Payment Date	The calendar date when last subrogation payment was received.
Claim Detail	Location of Loss Country	The country where the loss occurred.
Claim Detail	Loss Date	The date on which an accident or loss occurred regardless of when the claim was filed.
Claim Detail	Loss Month	The month that the claim loss period began.
Claim Detail	Loss Quarter	The quarter that the claim loss period began.
Claim Detail	Loss Time	The number that identifies the time a loss occurred.
Claim Detail	Loss Year	The year that the claim loss period began.
Claim Detail	Number of Rental Days	The total count of days a replacement item is rented.
Claim Detail	Number of Repair Days	The total count of days required to repair an item.
Claim Detail	Number of Storage Days	The total count of days an item is stored.
Additional Filters>Policy Detail		
Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.
Policy Detail	Cancel Reason	The system code describes the reason for a cancellation.
Policy Detail	Exposure Basis	The denomination in which the exposure units are expressed.
Policy Detail	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
Policy Detail	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Policy Detail	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
Policy Detail	Package Discount Percent	The percentage of premium waived when Package Discount applies.
Policy Detail	Package Modification Assignment Code	This code indicates the package modification assignment.
Policy Detail	Package Modification Factor	The percentage of premium waived as a result of packaging coverages.
Policy Detail	Policy Age	The number of months in policy term.
Policy Detail	Policy Cancel Date	The date a policy or coverage was terminated by cancellation.
Policy Detail	Policy Effective Date	The effective date of the policy related to this transaction.
Policy Detail	Policy Expiration Date	The expiration date of the policy related to this transaction.
Policy Detail	Policy Number	A unique client-assigned number identifying each policy.
Policy Detail	Policy Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
Policy Detail	Policy Type	The description of the type of coverage included in a policy.
Policy Detail	Policy Type Category	The categorization of the type of coverage a policy includes.
Policy Detail	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
Policy Detail	Premium Basis	The basis to which rates are applied to determine premiums.
Policy Detail	Renewal Term	The length of the renewal policy period (term) in months.
Policy Detail	Supporting Business Discount Percent	The percentage of premium waived when supporting business discount applies.
Policy Detail	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.
Additional Filters>Cancelled/Effective/Expired/Inforce/Retained/Written Policy Detail		

Table 17: Commercial Auto (Continued)

Category	Filter	Description
Cancelled Policy Detail, Effective Policy Detail, Expired Policy Detail, Inforce Policy Detail, Retained Policy Detail, Written Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.
	Cancel Reason	The system code describes the reason for a cancellation.
	Exposure Basis	The denomination in which the exposure units are expressed.
	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
	Package Discount Percent	The percentage of premium waived when Package Discount applies.
	Package Modification Assignment Code	This code indicates the package modification assignment.
	Package Modification Factor	The percentage of premium waived as a result of packaging coverages.
	Policy Cancellation Date	The date a policy or coverage was terminated by cancellation.
	Policy Effective Date	The effective date of the policy related to this transaction.
	Policy Expiration Date	The expiration date of the policy related to this transaction.
	Policy Number	A unique client-assigned number identifying each policy.
	Policy Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
	Policy Type	The description of the type of coverage included in a policy.
Policy Type Category	The categorization of the type of coverage a policy includes.	

Table 17: Commercial Auto (Continued)

Category	Filter	Description
	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
	Premium Basis	The basis to which rates are applied to determine premiums.
	Renewal Term	The length of the renewal policy period (term) in months.
	Supporting Business Discount Percent	The percentage of premium waived when supporting business discount applies.
	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.

COMMERCIAL PROPERTY

Table 18: Commercial Property

Category	Filter	Description
Who	Assistant Underwriter	The name of the assistant underwriter.
Who	Assistant Underwriter Number	A unique number assigned to an assistant underwriter.
Who	Distribution Channel Name	The name used to represent the distribution channel.
Who	Distribution Channel Type	A code used to represent the type of distribution channel.
Who	Group Program	The code used to represent the program that a group of policies are associated with.
Who	Group Program Type	The type of program that is represented.
Who	Producer Name	The name of the producer.
Who	Producer Number	The number used to represent the producer.
Who	Producer Type	The code used to represent the producer type.
Who	Sub Producer Name	The name of an individual producer within an insurance agency.
Who	Sub Producer Number	The number used to represent the sub producer.
Who	Sub Producer Type	The code used to represent the sub producer type.
Who	Underwriter Name	The name of the underwriter.
Who	Underwriter Number	A unique number assigned to an underwriter.
Who>Assistant Underwriter		
Assistant Underwriter	Assistant Underwriter Birth Date	The assistant underwriter's birth date.
Assistant Underwriter	Assistant Underwriter City	The city where the assistant underwriter lives.
Assistant Underwriter	Assistant Underwriter Contact	The description of the contact method for the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Contact Type	The contact method for the assistant underwriter.
Assistant Underwriter	Assistant Underwriter County	The county of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Country	The country of the assistant underwriter's location.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter District	The district of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Government ID Number	The government-issued identifier issued to the assistant underwriter. For example, in the USA it is SSN or FEIN.
Assistant Underwriter	Assistant Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Latitude	The latitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Longitude	The longitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Name	The name of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Number	The number or other identifier that identifies the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Postal Code	The full postal zip code as defined by company specifications.
Assistant Underwriter	Assistant Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Assistant Underwriter	Assistant Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Assistant Underwriter	Assistant Underwriter Present Employment Start Year	The calendar year that the assistant underwriter began employment at current employer.
Assistant Underwriter	Assistant Underwriter Region	The geographical region of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter State	The state of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Tax Location ID	The Tax Location Identifier for the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Territory	The territory of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Type	The classification of the assistant underwriter's role.
Who>Insurance Company		
Insurance Company	Insurance Company AM Best Number	The number or other identifier that identifies the insurance company AM Best Rating.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Insurance Company	Insurance Company Business Start Date	The calendar date when the insurance company began business operations.
Insurance Company	Insurance Company City	The city where the insurance company is located.
Insurance Company	Insurance Company County	The county where insurance company is located.
Insurance Company	Insurance Company Contact	The description of the insurance company Contact Type.
Insurance Company	Insurance Company Contact Type	The contact method for the insurance company.
Insurance Company	Insurance Company Country	The country where the insurance company is located.
Insurance Company	Insurance Company DBA	The operational name (Doing Business As) of an insurance company.
Insurance Company	Insurance Company District	The district where the insurance company is located.
Insurance Company	Insurance Company Government ID Number	The government-issued identifier issued to the insurance company. For example, in the USA it is SSN or FEIN.
Insurance Company	Insurance Company ISO Code	The insurance company's Insurance Service Office (ISO) Code.
Insurance Company	Insurance Company Latitude	The latitude location of insurance company.
Insurance Company	Insurance Company Longitude	The longitude location of insurance company
Insurance Company	Insurance Company Name	The name of the insurance company.
Insurance Company	Insurance Company NAIC Code	The North America Industry Class System (NAICS) Code assigned to insurance company.
Insurance Company	Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Insurance Company	Insurance Company NAICS Code	The North America Industry Class System (NAICS) Code assigned to insurance company.
Insurance Company	Insurance Company Nature of Business	The type or category of the business activities done by the insurance company.
Insurance Company	Insurance Company Number of Employees	The count of people employed at the insurance company.
Insurance Company	Insurance Company Postal Code	The full postal zip code as defined by the insurance company specifications.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Insurance Company	Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Insurance Company	Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Insurance Company	Insurance Company Region	The geographical region where the insurance company is located.
Insurance Company	Insurance Company State	The state where the insurance company is located.
Insurance Company	Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insurance company.
Insurance Company	Insurance Company Tax Location ID	The Tax Location Identifier for the insurance company's location.
Insurance Company	Insurance Company Territory	The territory where the insurance company is located.
Insurance Company	Insurance Company Type	The classification of the insurance company's primary operations.
Who>Insured		
Insured	Insured Audit Frequency	The indicator of when an insured audit is scheduled.
Insured	Insured Audit Type	The classification of the audit activities conducted on insured.
Insured	Insured Birth Date	The calendar date when insured was born.
Insured	Insured Business Start Date Identifier	The calendar date when the insured Business operations began.
Insured	Insured City	The name of the city in the address
Insured	Insured Contact	The description of the insured's Contact type.
Insured	Insured Contact Type	The Contact method for the insured.
Insured	Insured Credit Score	The code or number that represents the insured credit rating score.
Insured	Insured DBA	The operational name (Doing Business As) of an insured's Business.
Insured	Insured Gender	The gender (Male or Female) of the insured.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Insured	Insured Government ID Number	The government-issued identifier issued to the insured. For example, in the USA it is SSN or FEIN.
Insured	Insured Marital Status	The present marital condition (single, married, divorced, widowed) of the insured.
Insured	Insured Name	The full name of the insured.
Insured	Insured NAICS Code	The North America Industry Class System (NAICS) Code assigned to insured.
Insured	Insured Nature of Business	The type or category of the business activities done by the insured.
Insured	Insured Number of Employees	The count of people employed by insured.
Insured	Insured Present Employment Start Year	The calendar year that the insured began working for their current employer.
Insured	Insured Prior Insurance Company	Name of insurance company that last provided insurance prior to policy inception.
Insured	Insured Report Period	The description of the timeframe of activities considered in an insured report
Insured	Insured Risk Grade	This code represents the AM Best or company defined risk grade for insured.
Insured	Insured SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insured.
Insured	Insured Type	The type of entity that contracted with insurance company to obtain a policy.
Who>Parent Insurance Company		
Parent Insurance Company	Parent Insurance Company AM Best Number	The number or other identifier that identifies the parent insurance company AM Best Rating.
Parent Insurance Company	Parent Insurance Company Business Start Date	The calendar date when the parent insurance company began business operations.
Parent Insurance Company	Parent Insurance Company City	The city where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Contact	The description of the parent insurance company contact type.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Parent Insurance Company	Parent Insurance Company Contact Type	The contact method for the parent insurance company.
Parent Insurance Company	Parent Insurance Company County	The county where parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Country	The country where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company DBA	The operational name (Doing Business As) of an parent insurance company.
Parent Insurance Company	Parent Insurance Company District	The district where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Government ID Number	The government-issued identifier issued to the parent insurance company. For example, in the USA it is SSN or FEIN.
Parent Insurance Company	Parent Insurance Company ISO Code	The parent insurance company's Insurance Service Office (ISO) Code.
Parent Insurance Company	Parent Insurance Company Latitude	The latitude location of parent insurance company.
Parent Insurance Company	Parent Insurance Company Longitude	The longitude location of insurance company
Parent Insurance Company	Parent Insurance Company Name	The name of the parent insurance company.
Parent Insurance Company	Parent Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Parent Insurance Company	Parent Insurance Company NAICS Code	The North America Industry Class System (NAICS) Code assigned to parent insurance company.
Parent Insurance Company	Parent Insurance Company Nature of Business	The type or category of the business activities done by the parent insurance company.
Parent Insurance Company	Parent Insurance Company Number of Employees	The count of people employed at the parent insurance company.
Parent Insurance Company	Parent Insurance Company Postal Code	The full postal zip code as defined by the parent insurance company specifications.
Parent Insurance Company	Parent Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Parent Insurance Company	Parent Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Parent Insurance Company	Parent Insurance Company Region	The geographical region where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the parent insurance company.
Parent Insurance Company	Parent Insurance Company State	The state where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Tax Location ID	The Tax Location Identifier for the parent insurance company's location.
Parent Insurance Company	Parent Insurance Company Territory	The territory where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Type	The classification of the parent insurance company's primary operations.
Who>Producer		
Producer	Producer Birth Date	The calendar date that details when is a producer's Date of Birth.
Producer	Producer Business Start Date	The calendar date when the producer began business operations.
Producer	Producer City	The city where the producer is located.
Producer	Producer Contact	The description of a producer's contact method.
Producer	Producer Contact Type	The contact method for a producer.
Producer	Producer County	The county where the producer is located.
Producer	Producer Country	The country where the producer is located.
Producer	Producer DBA	The operational name (Doing Business As) of a producer's Business
Producer	Producer District	The district where the producer is located.
Producer	Producer Effective Date	The calendar date the producer appointment begins.
Producer	Producer Gender	The gender (Male or Female) of the producer.
Producer	Producer Government ID Number	The government-issued identifier issued to the producer. For example, in the USA it is SSN or FEIN.
Producer	Producer Latitude	The latitude location of the producer.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Producer	Producer Longitude	The longitude location of the producer.
Producer	Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the producer.
Producer	Producer Name	The full name of the producer.
Producer	Producer NAICS Code	The North America Industry Class System (NAICS) Code issued to producer.
Producer	Producer Nature of Business	The type or category of the business activities done by the producer.
Producer	Producer Number of Employees	The count of people employed by producer.
Producer	Producer Postal Code	The full postal zip code as defined by company specifications.
Producer	Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Producer	Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Producer	Producer Present Employment Start Year	The year when the producer began working for their current employer.
Producer	Producer Region	The geographical region where producer is located.
Producer	Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the producer.
Producer	Producer State	The state where producer is located.
Producer	Producer State License Number	The government-issued license number issued to the producer.
Producer	Producer Tax Location ID	The Tax Location Identifier for the producer's location
Producer	Producer Territory	The territory where the producer is located.
Producer	Producer Type	This code represents the producer type.
Who>Reinsurance Company		
Reinsurance Company	Reinsurance Company Business Start Date	The calendar date when the reinsurance company began business operations.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company City	The city where reinsurance company is located.
Reinsurance Company	Reinsurance Company Contract	The description of the reinsurance company Contract.
Reinsurance Company	Reinsurance Company Contact Type	The contact method for reinsurance company.
Reinsurance Company	Reinsurance Company County	The county where reinsurance company is located.
Reinsurance Company	Reinsurance Company Country	The country where reinsurance company is located.
Reinsurance Company	Reinsurance Company DBA	The operational name (Doing Business As) of a reinsurance company.
Reinsurance Company	Reinsurance Company District	District where reinsurance company is located.
Reinsurance Company	Reinsurance Company Latitude	The latitude location of reinsurance company.
Reinsurance Company	Reinsurance Company Longitude	The longitude location of reinsurance company.
Reinsurance Company	Reinsurance Company NAICS Code	North America Industry Class System (NAICS) Code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company Name	The name of the reinsurance company.
Reinsurance Company	Reinsurance Company Nature of Business	The type or category of the business activities done by the reinsurance company.
Reinsurance Company	Reinsurance Company Number	The identifier assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company Number of Employees	The count of people employed by the reinsurance company.
Reinsurance Company	Reinsurance Company Postal Code	The full postal zip code as defined by company specifications.
Reinsurance Company	Reinsurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Reinsurance Company	Reinsurance Company Postal Code SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company Region	The geographical region of reinsurance company.
Reinsurance Company	Reinsurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company State	The state where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Tax Location Identifier	The Tax Location Identifier of the reinsurance company's location.
Reinsurance Company	Reinsurance Company Territory	The territory where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Type	The code that identifies reinsurance company Type.
Who>Sub Producer		
Sub Producer	Sub Producer Birth Date	The calendar date that details when is a sub producer's Date of Birth.
Sub Producer	Sub Producer Business Start Date	The calendar date when the sub producer began business operations.
Sub Producer	Sub Producer City	The city where the sub producer is located.
Sub Producer	Sub Producer Contact	The description of a sub producer's contact method.
Sub Producer	Sub Producer Contact Type	The contact method for a sub producer.
Sub Producer	Sub Producer County	The county where the sub producer is located.
Sub Producer	Sub Producer Country	The country where the sub producer is located.
Sub Producer	Sub Producer DBA	The operational name (Doing Business As) of a sub producer's Business.
Sub Producer	Sub Producer District	District where the sub producer is located.
Sub Producer	Sub Producer Effective Date	The calendar date the sub producer appointment begins.
Sub Producer	Sub Producer Gender	The gender (Male or Female) of the sub producer.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Sub Producer	Sub Producer Government ID Number	The government-issued identifier issued to the sub producer. For example, in the USA it is SSN or FEIN.
Sub Producer	Sub Producer Latitude	The latitude location of sub producer.
Sub Producer	Sub Producer Longitude	The longitude location of sub producer.
Sub Producer	Sub Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the sub producer.
Sub Producer	Sub Producer NAICS Code	North America Industry Class System (NAICS) Code issued to sub producer.
Sub Producer	Sub Producer Name	The full name of the sub producer.
Sub Producer	Sub Producer Nature of Business	The type or category of the business activities done by the sub producer.
Sub Producer	Sub Producer Number of Employees	The count of people employed by sub producer.
Sub Producer	Sub Producer Postal Code	The full postal zip code as defined by company specifications.
Sub Producer	Sub Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Sub Producer	Sub Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Sub Producer	Sub Producer Present Employment Start Year	The year when sub producer began working for their current employer.
Sub Producer	Sub Producer Region	The geographical region where the sub producer is located.
Sub Producer	Sub Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the sub producer.
Sub Producer	Sub Producer State	The state where the sub producer is located.
Sub Producer	Sub Producer State_LIC_Number	The government-issued license number issued to sub producer.
Sub Producer	Sub Producer Tax Location ID	The Tax Location Identifier for the sub producer's location.
Sub Producer	Sub Producer Territory	The territory where the sub producer is located.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Sub Producer	Sub Producer Type	This code represents the sub producer type Standard Code.
Who>Underwriter		
Underwriter	Underwriter Birth Date	The underwriter's birth date.
Underwriter	Underwriter City	The city where the underwriter lives.
Underwriter	Underwriter Contact	The description of the contact method for the underwriter.
Underwriter	Underwriter Contact Type	The contact method for the underwriter.
Underwriter	Underwriter County	The county of the underwriter's location.
Underwriter	Underwriter Country	The country of the underwriter's location.
Underwriter	Underwriter District	The district of the underwriter's location.
Underwriter	Underwriter Government ID Number	The government-issued identifier issued to the assistant underwriter. For example, in the USA it is SSN or FEIN.
Underwriter	Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Underwriter	Underwriter Latitude	The latitude location of the underwriter.
Underwriter	Underwriter Longitude	The longitude location of the underwriter.
Underwriter	Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the underwriter.
Underwriter	Underwriter Name	The name of the underwriter.
Underwriter	Underwriter Number	The number or other identifier that identifies the underwriter.
Underwriter	Underwriter Postal Code	The full postal zip code as defined by company specifications.
Underwriter	Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Underwriter	Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Underwriter	Underwriter Present Employment Start Year	The calendar year that the underwriter began employment at current employer.
Underwriter	Underwriter Region	The geographical region of the underwriter's location.
Underwriter	Underwriter State	The state of the underwriter's location.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Underwriter	Underwriter Tax Location ID	The Tax Location Identifier for the underwriter's location.
Underwriter	Underwriter Territory	The territory of the underwriter's location.
Underwriter	Underwriter Type	The classification of the underwriter's role.
What		
What	Currency Code	This system code identifies document currency.
What>Billing Account		
Billing Account	Billing Account Number	The number of the account in the billing system, if different than the policy system.
Billing Account	Method of Payment	The manner that the insured makes payments on billing account balance.
Billing Account	Payment Plan	The payment schedule applied to a policy balance.
Billing Account	Payment Service	The Payment Service Code identifies the type of billing plan used for the policy.
What>Class		
Class	Class Code	A class code is a three to six character field used to classify the general characteristics of an employees function. Used for rating.
Class	Class State	The state associated with the insured address.
Class	Primary Class Code	In a situation where the class code is split into more than one useful breakout, this is the primary portion.
Class	Secondary Class Code	In a situation where the class code is split into more than one useful breakout, this is the secondary portion.
What>Commercial Property Building		
Commercial Property Building	Commercial Property Building Aluminum Wiring Flag	The yes/no indicator identifying the presence or absence of aluminum wiring.
Commercial Property Building	Commercial Property Building Area	The total area measurement of the insured building.
Commercial Property Building	Commercial Property Building Basement Area	The total area measurement of all the basements in this building.
Commercial Property Building	Commercial Property Building Building Use	The classification detailing the activities occurring at a building.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Commercial Property Building	Commercial Property Building Burglar Monitor Type	The unique value describing the attributes of a burglar alarm in use.
Commercial Property Building	Commercial Property Building Circuit Breakers Flag	The yes/no indicator identifying the presence or absence of circuit breakers.
Commercial Property Building	Commercial Property Building City Limits Code	This code describes if a building is located within or outside city limit boundary.
Commercial Property Building	Commercial Property Building Condition	The classification detailing the maintenance condition of a building.
Commercial Property Building	Commercial Property Building Construction Type	The description of the primary building exterior construction materials.
Commercial Property Building	Commercial Property Building Copper Wiring Flag	The yes/no indicator identifying the presence or absence of copper wiring.
Commercial Property Building	Commercial Property Building Current Year Property Income	The total amount of income from activities at the insured building during the current year.
Commercial Property Building	Commercial Property Building Distance to Fire Hydrant	The distance from the building to nearest fire hydrant location.
Commercial Property Building	Commercial Property Building Distant to Fire Station	The distance from the building to nearest fire station location.
Commercial Property Building	Commercial Property Building Electricity Update Type	The classification that describes changes to electrical system after the original construction.
Commercial Property Building	Commercial Property Building Electricity Update Year	The calendar year of the last update of building's electrical system.
Commercial Property Building	Commercial Property Building Fire District	The fire department response district assigned to the building location.
Commercial Property Building	Commercial Property Building Fire Extinguisher Flag	The indicator that a fire extinguisher is present at covered building.
Commercial Property Building	Commercial Property Building Fire Monitor Type	The attributes of fire monitoring alarm used at the building.
Commercial Property Building	Commercial Property Building Fire Protection Class	The code describes the fire protection services available at building location.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Commercial Property Building	Commercial Property Building Foundation Type	The construction method used to construct the building foundation.
Commercial Property Building	Commercial Property Building Fuses Flag	The yes/no indicator identifying the presence or absence of fuses.
Commercial Property Building	Commercial Property Building Gas Update Type	The changes to the gas system after the original construction
Commercial Property Building	Commercial Property Building Gas Update Year	The calendar year of the last update of the building gas system.
Commercial Property Building	Commercial Property Building Heat Update Type	The changes to the heating system after the original construction.
Commercial Property Building	Commercial Property Building Heat Update Year	The calendar year of the last update of the building heating system.
Commercial Property Building	Commercial Property Building Knob Tube Wiring Flag	The yes/no indicator identifying the presence or absence of knob and tube wiring.
Commercial Property Building	Commercial Property Building Location City	The city where the building is located.
Commercial Property Building	Commercial Property Building Location County	The county where the building is located.
Commercial Property Building	Commercial Property Building Location Country	The country where the building is located.
Commercial Property Building	Commercial Property Building Location District	The district where the building is located.
Commercial Property Building	Commercial Property Building Location Latitude	The latitude location of the building location.
Commercial Property Building	Commercial Property Building Location Longitude	The longitude location of the building location.
Commercial Property Building	Commercial Property Building Location Number	This number identifies the building location number.
Commercial Property Building	Commercial Property Building Location Postal Code	The full postal zip code as defined by company specifications.
Commercial Property Building	Commercial Property Building Location Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Commercial Property Building	Commercial Property Building Location Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Commercial Property Building	Commercial Property Building Location Region	The geographical region where the building is located.
Commercial Property Building	Commercial Property Building Location State	The state associated with the building location.
Commercial Property Building	Commercial Property Building Location Tax Location ID	The Tax Location Identifier of the building location.
Commercial Property Building	Commercial Property Building Location Territory	The territory where the building is located.
Commercial Property Building	Commercial Property Building Market Value	The average price of similar buildings recently sold in same real estate market.
Commercial Property Building	Commercial Property Building Name of Owner	The name of the owner of the building.
Commercial Property Building	Commercial Property Building Number of Electricity System Amps	Number that represents the electrical current capacity of electrical system.
Commercial Property Building	Commercial Property Building Number of Families	The total count of individual family units in single building. For example, a duplex would have 2 families.
Commercial Property Building	Commercial Property Building Number of Stories	The total count of building floor levels contained in the building.
Commercial Property Building	Commercial Property Building Occupancy	The classification detailing the activities occurring at a building.
Commercial Property Building	Commercial Property Building Occupancy Type	The attributes of occupants of the building. For example, owner and tenant occupants.
Commercial Property Building	Commercial Property Building Plumbing Update Type	The classification detailing changes to plumbing system after the original construction.
Commercial Property Building	Commercial Property Building Plumbing Update Year	The calendar year of the last update of the building plumbing system.
Commercial Property Building	Commercial Property Building Primary Heat Type	The classification of the primary source of heat for the commercial building.
Commercial Property Building	Commercial Property Building Property Lot Size	The total area measurement of the land within the property lot boundaries.
Commercial Property Building	Commercial Property Building Purchase Date	The calendar date that identifies the building purchase date.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Commercial Property Building	Commercial Property Building Purchase Price	The monetary amount paid when the building was purchased.
Commercial Property Building	Commercial Property Building Roof Material	The roofing material used on the building roof.
Commercial Property Building	Commercial Property Building Roof Update Type	The classification detailing changes to roofing materials after the original construction.
Commercial Property Building	Commercial Property Building Roof Update Year	The calendar year of the last update of the building roofing materials.
Commercial Property Building	Commercial Property Building Secondary Heat Type	The classification of the secondary source of heat for the building.
Commercial Property Building	Commercial Property Building Type	The classification that identifies the building unit construction. For example, single-family, multi-family, warehouse, etc.
Commercial Property Building	Commercial Property Building Under Construction Type	This code indicates active construction activities on the building.
Commercial Property Building	Commercial Property Building Wiring Update Type	The classification detailing changes to wiring system after the original construction.
Commercial Property Building	Commercial Property Building Wiring Update Year	The calendar year of the last update to the building's wiring.
Commercial Property Building	Commercial Property Building Year Built	The calendar year that the building was constructed.
What>Coverage		
Coverage	Annual Statement Line	A code that indicates in which line of the annual statement a transaction belongs.
Coverage	Bureau Report Plan	Indicates the statistical plan code used for bureau reporting.
Coverage	Coverage	This field reports a code based on the type of coverage afforded on the insurance line policy. The aggregate of risks covered by the terms of a contract of insurance.
Coverage	Coverage Category	A way to group coverages within a line of business.
Coverage	Coverage Effective Date	The calendar date when the policy coverage begins.
Coverage	Coverage Expiration Date	The calendar date when the policy coverage ends.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Coverage	Coverage Part	An indicator of a line of business within a package policy.
Coverage	Secondary Coverage	A client defined code to further breakdown the type of coverage afforded on the insurance line policy.
Coverage	Statistical Plan Code	This code identifies the Statistical Plan for coverage.
What>Deductible		
Deductible	Deductible	The amount of loss that the policyholder is responsible to pay.
Deductible	Deductible Applies To	This code is used to identify to what the deductible applies.
Deductible	Deductible Basis	This code represents the basis applied to determine the deductible.
Deductible	Deductible Type	This code represents the deductible type that pertains to a particular policy coverage.
What>Distribution Channel		
Distribution Channel	Distribution Channel Name	The full name of the distribution channel.
Distribution Channel	Distribution Channel Number	The number or other identifier assigned to the distribution channel.
Distribution Channel	Distribution Channel Type	The classification of the activities of a distribution channel.
Distribution Channel	Typical Commission Rate	The rate of commission given to a producer for a sale of a policy unless the commission rate is overridden.
What>Group Program		
Group Program	Group Program Anniversary Date	The calendar date that identifies the anniversary of a group program.
Group Program	Group Program Dividend Plan	The classification of the manner in which a group program dividend is paid.
Group Program	Group Program Dividend Date	The calendar date that identifies the dividend date of a group program.
Group Program	Group Program Member Count	This number identifies the group program.
Group Program	Group Program Name	The name of the program, other than state or national, that a group of policies are associated with.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Group Program	Group Program Natural Name	The name of the national program that a group of policies are associated with.
Group Program	Group Program Original Date	The calendar date that identifies group program origination date.
Group Program	Group Program Status	The description of the current condition of a program with which a group of policies is associated.
Group Program	Group Program State	The state associated with group program.
Group Program	Group Program Type	The type of program that is represented.
What>Line of Business		
Line of Business	Company Product	A company-unique code indicating the product classification of this policy. The source of this code list is the individual carriers.
Line of Business	Line of Business	A code used to represent the Line of Business.
Line of Business	Line of Business Subcode	A further breakdown of Line of Business. May be defined by company.
Line of Business	Monoline/Package	A code that tells if a policy is a monoline policy or is written as part of a package.
Line of Business	Policy Type	An additional way to categorize policies.
Line of Business	Policy Type Category	An additional way to categorize policies based on client specifications.
What>Limit		
Limit	First Limit	The first limit of coverage for each type of coverage.
Limit	Full Limit	The limit associated with the coverage code.
Limit	Limit Applies To	A code identifying to what the limit applies.
Limit	Limit Basis	The code for basis to which the limit applies.
Limit	Limit Type	The code that describes a limit.
Limit	Second Limit	The second limit of coverage for each type of coverage.
Limit	Third Limit	The third limit of coverage for each type of coverage.
Limit	Valuation Code	This code reports the valuation of the limit of coverage for each type of coverage.
What>Reinsurance Contract		

Table 18: Commercial Property (Continued)

Category	Filter	Description
Reinsurance Contract	Reinsurance Contract Begin Date	The calendar date that identifies when reinsurance contract begins.
Reinsurance Contract	Reinsurance Contract Category	The category of the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Ceded Loss Ratio	The ratio of losses and loss adjustment expenses incurred to premiums earned for the portion of exposure that is transferred to a reinsurance company.
Reinsurance Contract	Reinsurance Contract Certificate Number	The unique identifier assigned to the reinsurance contract certificate.
Reinsurance Contract	Reinsurance Contract Cession Number	The unique identifier of the reinsurance contract cession.
Reinsurance Contract	Reinsurance Contract End Date	The calendar date reinsurance contract ends.
Reinsurance Contract	Reinsurance Contract Facultative Commission Percent	The percentage commission paid to reinsurer.
Reinsurance Contract	Reinsurance Contract Layer	The Reinsurance Contract Layer describes the amount of reinsurance provided in the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Type	The contract type for the reinsurance contract dimension.
Reinsurance Contract	Reinsurance Contract Treaty Number	A unique identifier assigned to a reinsurance contract treaty.
When		
When	Calendar Month	The numeric representation of the month (1-12).
When	Calendar Month Name	The name of a month (Jan, Feb, etc.).
When	Calendar Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Calendar Quarter Name	The name of a quarter (Q1 - Q4).
When	Calendar Year	The one-year period that begins on January 1 and ends on December 31.
When	Fiscal Month	The numeric representation of the month (1-12).
When	Fiscal Month Name	The name of a month (Jan, Feb, etc.).
When	Fiscal Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").

Table 18: Commercial Property (Continued)

Category	Filter	Description
When	Fiscal Quarter Name	The name of a quarter (Q1 - Q4).
When	Fiscal Year	The year commencing with the effective date of the insurance policy or with an anniversary of that date.
Where		
Where	Insured City	The name of the city in the address.
Where	Insured Country	The country code in the address.
Where	Insured County	The county in the address.
Where	Insured District	The geographical district where the insured is located.
Where	Insured Latitude	The latitude location of the insured's address.
Where	Insured Longitude	The longitude location of the insured's address.
Where	Insured Postal Code	The full postal zip code as defined by company specifications.
Where	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Insured Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Where	Insured Region	The geographical region where insured is located.
Where	Insured State	The state of the insured's location.
Where	Insured Tax Location ID	The tax location Identifier for the insured's location.
Where	Insured Territory	The territory of the insured's location.
Where	Location of Loss City	The city where the loss occurred.
Where	Location of Loss Country	The country where the loss occurred.
Where	Location of Loss County	The county where the loss occurred.
Where	Location of Loss District	The district where the loss occurred.
Where	Location of Loss Latitude	The latitude location where the loss occurred.
Where	Location of Loss Longitude	The longitude location where the loss occurred.
Where	Location of Loss Postal Code	The full postal zip code as defined by company specifications.
Where	Location of Loss Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Where	Location of Loss Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code. This is the sub code of the location where the loss occurred.
Where	Location of Loss Region	The geographical region where a loss occurred.
Where	Location of Loss State	The state where a loss occurred.
Where	Location of Loss Tax Location ID	The Tax Location Identifier of the location where a loss occurred.
Where	Location of Loss Territory	The territory where a loss occurred.
Additional Filters>Claim Detail		
Claim Detail	Case Made Retroactive Date	The calendar date that the claim case was made retroactive.
Claim Detail	Case Management Assigned Date	The calendar date that claim management is assigned to claim.
Claim Detail	Claim Closed Date	The date on which the insurance company closed the claim.
Claim Detail	Claim Number	A unique number assigned to each claim.
Claim Detail	Claim Opened Date	The date a claim was opened.
Claim Detail	Claim Reclosed Date	The date a claim was closed after being reopened.
Claim Detail	Claim Reopened Date	The date on which a closed claim was changed to open status.
Claim Detail	Claim Report Class Code	The code describes the class code report class applicable to the claim, regardless of the class codes on the policy.
Claim Detail	Claim Reported By	The source of claim report.
Claim Detail	Claim Reported Date	The date the insured filed the claim with the insurance carrier.
Claim Detail	Claim Status	The process condition of a claim.
Claim Detail	Claims Made Basis Code	The code identifies whether or not the claims made basis is being used for reporting of claims.
Claim Detail	First Claim Contact Date	The calendar date that the claimant was first contacted by the insuring company or its representative.
Claim Detail	First Claim Payment Date	The calendar date when the first payment was made on a claim.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Claim Detail	Fraud Claim Code	The code to indicate potential fraudulent claim based on adjusters' investigation.
Claim Detail	Last Claim Payment Date	The calendar date when the Last Claim Payment was issued.
Claim Detail	Last Salvage Payment Date	The calendar date when the last payment was made associated with salvage.
Claim Detail	Last Subrogation Payment Date	The calendar date when Last Subrogation Payment was received.
Claim Detail	Loss Date	The calendar date on which an accident or loss occurred regardless of when the claim was filed.
Claim Detail	Loss Month	The month that the claim loss period began.
Claim Detail	Loss Quarter	The quarter that the claim loss period began.
Claim Detail	Loss Time	The number that identifies the time a loss occurred.
Claim Detail	Loss Year	The year that the claim loss period began.
Claim Detail	Number of Rental Days	The total count of days a replacement item is rented.
Claim Detail	Number of Repair Days	The total count of days required to repair an item.
Claim Detail	Number of Storage Days	The total count of days an item is stored.
Additional Filters>Policy Detail		
Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.
Policy Detail	Cancel Reason	The system code describes the reason for a cancellation.
Policy Detail	Exposure Basis	The denomination in which the exposure units are expressed.
Policy Detail	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
Policy Detail	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
Policy Detail	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
Policy Detail	Package Discount Percent	The percentage of premium waived when Package Discount applies.

Table 18: Commercial Property (Continued)

Category	Filter	Description
Policy Detail	Package Modification Assignment Code	This code indicates the package modification assignment.
Policy Detail	Package Modification Factor	The percentage of premium waived as a result of packaging coverages.
Policy Detail	Policy Age	The number of months in policy term.
Policy Detail	Policy Cancellation Date	The date a policy or coverage was terminated by cancellation.
Policy Detail	Policy Effective Date	The effective date of the policy related to this transaction.
Policy Detail	Policy Expiration Date	The expiration date of the policy related to this transaction.
Policy Detail	Policy Number	A unique client-assigned number identifying each policy.
Policy Detail	Policy Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
Policy Detail	Policy Type	The description of the type of coverage included in a policy.
Policy Detail	Policy Type Category	The categorization of the type of coverage a policy includes.
Policy Detail	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
Policy Detail	Premium Basis	The basis to which rates are applied to determine premiums.
Policy Detail	Renewal Term	The length of the renewal policy period (term) in months.
Policy Detail	Supporting Business Discount Percent	The percentage of premium waived when supporting business discount applies.
Policy Detail	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.
Additional Filters>Cancelled/Effective/Expired/Inforce/Retained/Written Policy Detail		
Cancelled Policy Detail, Effective Policy Detail, Expired Policy Detail, Inforce Policy Detail, Retained Policy Detail, Written Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.

Table 18: Commercial Property (Continued)

Category	Filter	Description
	Cancel Reason	The system code describes the reason for a cancellation.
	Exposure Basis	The denomination in which the exposure units are expressed.
	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
	Package Discount Percent	The percentage of premium waived when Package Discount applies.
	Package Modification Assignment Code	This code indicates the package modification assignment.
	Package Modification Factor	The percentage of premium waived as a result of packaging coverages.
	Policy Cancellation Date	The date a policy or coverage was terminated by cancellation.
	Policy Effective Date	The effective date of the policy related to this transaction.
	Policy Expiration Date	The expiration date of the policy related to this transaction.
	Policy Number	A unique client-assigned number identifying each policy.
	Policy Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
	Policy Type	The description of the type of coverage included in a policy.
	Policy Type Category	The categorization of the type of coverage a policy includes.
	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
	Premium Basis	The basis to which rates are applied to determine premiums.
	Renewal Term	The length of the renewal policy period (term) in months.

Table 18: Commercial Property (Continued)

Category	Filter	Description
	Supporting Business Discount Percent	The percentage of premium waived when supporting business discount applies.
	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.

CORPORATE DETAIL

Table 19: Corporate Detail

Category	Filter	Description
Who	Assistant Underwriter	The name of the assistant underwriter.
Who	Assistant Number	A unique number assigned to an assistant underwriter.
Who	Company Name	The name of the company associated with the policy.
Who	Company Type	A code used to represent the type of company.
Who	Distribution Channel Name	The name used to represent the distribution channel.
Who	Distribution Channel Number	The number or other identifier assigned to the distribution channel.
Who	Distribution Channel Type	A code used to represent the type of distribution channel.
Who	Group Program	The code used to represent the program that a group of policies are associated with.
Who	Group Program Type	The type of program that is represented.
Who	Producer Name	The name of the producer.
Who	Producer Number	The number used to represent the producer.
Who	Producer Type	The code used to represent the producer type.
Who	Sub Producer Name	The name of an individual producer within an insurance agency.
Who	Sub Producer Number	The number used to represent the sub producer.
Who	Underwriter Name	The name of the underwriter.
Who	Underwriter Number	A unique number assigned to an underwriter.
Who>Assistant Underwriter		
Assistant Underwriter	Assistant Underwriter Birth Date	The assistant underwriter's birth date.
Assistant Underwriter	Assistant Underwriter City	The city where the assistant underwriter lives.
Assistant Underwriter	Assistant Underwriter Contact	The description of the contact method for the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Contact Type	The contact method for the assistant underwriter.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter County	The county of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Country	The country of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter District	The district of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Government ID Number	The government-issued identifier issued to the assistant underwriter. For example, in the USA it is SSN or FEIN.
Assistant Underwriter	Assistant Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Latitude	The latitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Longitude	The longitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Name	The name of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Number	The number or other identifier that identifies the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Postal Code	The full postal zip code as defined by company specifications.
Assistant Underwriter	Assistant Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Assistant Underwriter	Assistant Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Assistant Underwriter	Assistant Underwriter Present Employment Start Year	The calendar year that the assistant underwriter began employment at current employer.
Assistant Underwriter	Assistant Underwriter Region	The geographical region of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter State	The state of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Tax Location ID	The Tax Location Identifier for the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Territory	The territory of the assistant underwriter's location.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter Type	The classification of the assistant underwriter's role.
Who>Insurance Company		
Insurance Company	Insurance Company AM Best Number	The number or other identifier that identifies the insurance company AM Best Rating.
Insurance Company	Insurance Company Business Start Date	The calendar date when the insurance company began business operations.
Insurance Company	Insurance Company City	The city where the insurance company is located.
Insurance Company	Insurance Company Contact	The description of the insurance company Contact Type.
Insurance Company	Insurance Company Contact Type	The contact method for the insurance company.
Insurance Company	Insurance Company County	The county where insurance company is located.
Insurance Company	Insurance Company Country	The country where the insurance company is located.
Insurance Company	Insurance Company DBA	The operational name (Doing Business As) of an insurance company.
Insurance Company	Insurance Company District	The district where the insurance company is located.
Insurance Company	Insurance Company Government ID Number	The government-issued identifier issued to the insurance company. For example, in the USA it is SSN or FEIN.
Insurance Company	Insurance Company ISO Code	The insurance company's Insurance Service Office (ISO) Code.
Insurance Company	Insurance Company Latitude	The latitude location of insurance company.
Insurance Company	Insurance Company Longitude	The longitude location of insurance company
Insurance Company	Insurance Company Name	The name of the insurance company.
Insurance Company	Insurance Company NAIC Code	The North America Industry Class System (NAICS) Code assigned to insurance company.
Insurance Company	Insurance Company NAICS Code	The North America Industry Class System (NAICS) Code assigned to insurance company.
Insurance Company	Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Insurance Company	Insurance Company Nature of Business	The type or category of the business activities done by the insurance company.
Insurance Company	Insurance Company Number of Employees	The count of people employed at the insurance company.
Insurance Company	Insurance Company Postal Code	The full postal zip code as defined by the insurance company specifications.
Insurance Company	Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Insurance Company	Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Insurance Company	Insurance Company Region	The geographical region where the insurance company is located.
Insurance Company	Insurance Company State	The state where the insurance company is located.
Insurance Company	Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insurance company.
Insurance Company	Insurance Company Tax Location ID	The Tax Location Identifier for the insurance company's location.
Insurance Company	Insurance Company Territory	The territory where the insurance company is located.
Insurance Company	Insurance Company Type	The classification of the insurance company's primary operations.
Who>Insured		
Insured	Insured Audit Frequency	The indicator of when an insured audit is scheduled.
Insured	Insured Audit Type	The classification of the audit activities conducted on insured.
Insured	Insured Birth Date	The calendar date when insured was born.
Insured	Insured Business Start Date Identifier	The calendar date when the insured Business operations began.
Insured	Insured City	The name of the city in the address
Insured	Insured Contact	The description of the insured's contact type.
Insured	Insured Contact Type	The contact method for the insured.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Insured	Insured County	The county in the address.
Insured	Insured Country	The country code in the address.
Insured	Insured Credit Score	The code or number that represents the insured credit rating score.
Insured	Insured DBA	The operational name (Doing Business As) of an insured's Business.
Insured	Insured Gender	The gender (Male or Female) of the insured.
Insured	Insured Government ID Number	The government-issued identifier issued to the insured. For example, in the USA it is SSN or FEIN.
Insured	Insured Latitude	The latitude location of the insured's address.
Insured	Insured Longitude	The longitude location of the insured location.
Insured	Insured Marital Status	The present marital condition (single, married, divorced, widowed) of the insured.
Insured	Insured NAICS Code	The North America Industry Class System (NAICS) Code assigned to insured.
Insured	Insured Nature of Business	The type or category of the business activities done by the insured.
Insured	Insured Number of Employees	The count of people employed by insured.
Insured	Insured Present Employment Start Year	The calendar year that the insured began working for their current employer.
Insured	Insured Prior Insurance Company	Name of insurance company that last provided insurance prior to policy inception.
Insured	Insured Report Period	The description of the timeframe of activities considered in an insured report
Insured	Insured Risk Grade	This code represents the AM Best or company defined risk grade for insured.
Insured	Insured SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insured.
Insured	Insured Type	The type of entity that contracted with insurance company to obtain a policy.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Insured	Policyholder Name	The full name of the insured.
Who>Parent Insurance Company		
Parent Insurance Company	Parent Insurance Company AM Best Number	The number or other identifier that identifies the parent insurance company AM Best Rating.
Parent Insurance Company	Parent Insurance Company Business Start Date	The calendar date when the parent insurance company began business operations.
Parent Insurance Company	Parent Insurance Company City	The city where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Contact	The description of the parent insurance company Contact Type.
Parent Insurance Company	Parent Insurance Company Contact Type	The contact method for the parent insurance company.
Parent Insurance Company	Parent Insurance Company County	The county where parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Country	The country where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company DBA	The operational name (Doing Business As) of an parent insurance company.
Parent Insurance Company	Parent Insurance Company District	The district where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Government ID Number	The government-issued identifier issued to the parent insurance company. For example, in the USA it is SSN or FEIN.
Parent Insurance Company	Parent Insurance Company ISO Code	The parent insurance company's Insurance Service Office (ISO) Code.
Parent Insurance Company	Parent Insurance Company Latitude	The latitude location of parent insurance company.
Parent Insurance Company	Parent Insurance Company Longitude	The longitude location of insurance company
Parent Insurance Company	Parent Insurance Company NAICS Code	The North America Industry Class System (NAICS) Code assigned to parent insurance company.
Parent Insurance Company	Parent Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Parent Insurance Company	Parent Insurance Company Name	The name of the parent insurance company.
Parent Insurance Company	Parent Insurance Company Nature of Business	The type or category of the business activities done by the parent insurance company.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Parent Insurance Company	Parent Insurance Company Number of Employees	The count of people employed at the parent insurance company.
Parent Insurance Company	Parent Insurance Company Postal Code	The full postal zip code as defined by the parent insurance company specifications.
Parent Insurance Company	Parent Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Parent Insurance Company	Parent Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Parent Insurance Company	Parent Insurance Company Region	The geographical region where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the parent insurance company.
Parent Insurance Company	Parent Insurance Company State	The state where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Tax Location ID	The Tax Location Identifier for the parent insurance company's location.
Parent Insurance Company	Parent Insurance Company Territory	The territory where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Type	The classification of the parent insurance company's primary operations.
Who>Producer		
Producer	Producer Birth Date	The calendar date that details when is a producer's Date of Birth.
Producer	Producer Business Start Date	The calendar date when the producer began business operations.
Producer	Producer City	The city where the producer is located.
Producer	Producer Contact	The description of a producer's contact method.
Producer	Producer Contact Type	The contact method for a producer.
Producer	Producer County	The county where the producer is located.
Producer	Producer Country	The country where the producer is located.
Producer	Producer DBA	The operational name (Doing Business As) of a producer's Business

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Producer	Producer District	The district where the producer is located.
Producer	Producer Effective Date	The calendar date the producer appointment begins.
Producer	Producer Gender	The gender (Male or Female) of the producer.
Producer	Producer Government ID Number	The government-issued identifier issued to the producer. For example, in the USA it is SSN or FEIN.
Producer	Producer Latitude	The latitude location of the producer.
Producer	Producer Longitude	The longitude location of the producer.
Producer	Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the producer.
Producer	Producer Name	The full name of the producer.
Producer	Producer NAICS Code	The North America Industry Class System (NAICS) Code issued to producer.
Producer	Producer Nature of Business	The type or category of the business activities done by the producer.
Producer	Producer Number of Employees	The count of people employed by producer.
Producer	Producer Postal Code	The full postal zip code as defined by company specifications.
Producer	Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Producer	Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Producer	Producer Present Employment Start Year	The year when the producer began working for their current employer.
Producer	Producer Region	The geographical region where producer is located.
Producer	Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the producer.
Producer	Producer State	The state where producer is located.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Producer	Producer State License Number	The government-issued license number issued to the producer.
Producer	Producer Tax Location ID	The Tax Location Identifier for the producer's location
Producer	Producer Territory	The territory where the producer is located.
Producer	Producer Type	This code represents the producer type.
Who>Reinsurance Company		
Reinsurance Company	Reinsurance Company Business Start Date	The calendar date when the reinsurance company began business operations.
Reinsurance Company	Reinsurance Company City	The city where reinsurance company is located.
Reinsurance Company	Reinsurance Company Contact	The description of the reinsurance company contact method.
Reinsurance Company	Reinsurance Company Contact Type	The contact method for reinsurance company.
Reinsurance Company	Reinsurance Company County	The county where reinsurance company is located.
Reinsurance Company	Reinsurance Company Country	The country where reinsurance company is located.
Reinsurance Company	Reinsurance Company DBA	The operational name (Doing Business As) of a reinsurance company.
Reinsurance Company	Reinsurance Company District	District where reinsurance company is located.
Reinsurance Company	Reinsurance Company Latitude	The latitude location of reinsurance company.
Reinsurance Company	Reinsurance Company Longitude	The longitude location of reinsurance company.
Reinsurance Company	Reinsurance Company NAICS Code	North America Industry Class System (NAICS) Code assigned to the reinsurance Company.
Reinsurance Company	Reinsurance Company Name	The name of the reinsurance company.
Reinsurance Company	Reinsurance Company Nature of Business	The type or category of the business activities done by the reinsurance company.
Reinsurance Company	Reinsurance Company Number	Identifier assigned to the reinsurance Company.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company Number of Employees	The count of people employed by the reinsurance Company.
Reinsurance Company	Reinsurance Company Postal Code	The full postal zip code as defined by company specifications.
Reinsurance Company	Reinsurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Reinsurance Company	Reinsurance Company Postal Code SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Reinsurance Company	Reinsurance Company Region	The geographical region of reinsurance company.
Reinsurance Company	Reinsurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company State	The state where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Tax Location Identifier	The Tax Location Identifier of the reinsurance company's location
Reinsurance Company	Reinsurance Company Territory	The territory where the reinsurance company is located
Reinsurance Company	Reinsurance Company Type Code	The code that identifies reinsurance company Type
Who>Sub Producer		
Sub Producer	Sub Producer Birth Date	The calendar date that details when is a sub producer's Date of Birth.
Sub Producer	Sub Producer Business Start Date	The calendar date when the sub producer began business operations.
Sub Producer	Sub Producer City	The city where the sub producer is located.
Sub Producer	Sub Producer Contact	The description of a sub producer's contact method.
Sub Producer	Sub Producer Contact Type	The contact method for a sub producer.
Sub Producer	Sub Producer County	The county where the sub producer is located.
Sub Producer	Sub Producer Country	The country where the sub producer is located.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Sub Producer	Sub Producer DBA	The operational name (Doing Business As) of a sub producer's Business
Sub Producer	Sub Producer District	District where the sub producer is located.
Sub Producer	Sub Producer Effective Date	The calendar date the sub producer appointment begins.
Sub Producer	Sub Producer Gender	The gender (Male or Female) of the sub producer.
Sub Producer	Sub Producer Government ID Number	The government-issued identifier issued to the sub producer. For example, in the USA it is SSN or FEIN.
Sub Producer	Sub Producer Latitude	The latitude location of sub producer.
Sub Producer	Sub Producer Longitude	The longitude location of sub producer.
Sub Producer	Sub Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the sub producer.
Sub Producer	Sub Producer Name	The full name of the sub producer.
Sub Producer	Sub Producer NAICS Code	North America Industry Class System (NAICS) Code issued to sub producer.
Sub Producer	Sub Producer Nature of Business	The type or category of the business activities done by the sub producer.
Sub Producer	Sub Producer Number of Employees	The count of people employed by sub producer.
Sub Producer	Sub Producer Postal Code	The full postal zip code as defined by company specifications.
Sub Producer	Sub Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Sub Producer	Sub Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Sub Producer	Sub Producer Present Employment Start Year	The year when the sub producer began working for their current employer.
Sub Producer	Sub Producer Region	The geographical region where the sub producer is located.
Sub Producer	Sub Producer State	The state where the sub producer is located.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Sub Producer	Sub Producer State_LIC_Number	Government-issued license number issued to sub producer.
Sub Producer	Sub Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the sub producer.
Sub Producer	Sub Producer Tax Location ID	The Tax Location Identifier for the sub producer's location
Sub Producer	Sub Producer Territory	The territory where the sub producer is located
Sub Producer	Sub Producer Type	This code represents the sub producer type Standard Code
Who>Underwriter		
Underwriter	Underwriter Birth Date	The underwriter's birth date.
Underwriter	Underwriter City	The city where the underwriter lives.
Underwriter	Underwriter Contact	The description of the contact method for the underwriter.
Underwriter	Underwriter Contact Type	The contact method for the underwriter.
Underwriter	Underwriter County	The county of the underwriter's location.
Underwriter	Underwriter Country	The country of the underwriter's location.
Underwriter	Underwriter District	The district of the underwriter's location.
Underwriter	Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Underwriter	Underwriter Government ID Number	The government-issued identifier issued to the assistant underwriter. For example, in the USA it is SSN or FEIN.
Underwriter	Underwriter Latitude	The latitude location of the underwriter.
Underwriter	Underwriter Longitude	The longitude location of the underwriter.
Underwriter	Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the underwriter.
Underwriter	Underwriter Name	The name of the underwriter.
Underwriter	Underwriter Number	The number or other identifier that identifies the underwriter.
Underwriter	Underwriter Present Employment Start Year	The calendar year that the underwriter began employment at current employer.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Underwriter	Underwriter Postal Code	The full postal zip code as defined by company specifications.
Underwriter	Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Underwriter	Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Underwriter	Underwriter Region	The geographical region of the underwriter's location.
Underwriter	Underwriter State	The state of the underwriter's location.
Underwriter	Underwriter Tax Location ID	The Tax Location Identifier for the underwriter's location.
Underwriter	Underwriter Territory	The territory of the underwriter's location.
Underwriter	Underwriter Type	The classification of the underwriter's role.
What		
What	Catastrophe	A code used to uniquely identify a catastrophe. This is the number assigned by the company.
What	Catastrophe State	The state code of the catastrophe state.
What	Class Code	A class code is a three to six character field used to classify the general characteristics of an employees function. Used for rating.
What	Currency Code	This system code identifies document currency.
What	Excess Catastrophe	This code to indicate that a catastrophe loss is in excess of policyholders' retention.
What	Line of Business	The name of the Line of Business.
What	Line of Business System Code	This system code represents a system line of business.
What	Monoline/Package	A code that tells if a policy is a monoline policy or is written as part of a package.
What	National Catastrophe Code	The number assigned to a national catastrophe to make it unique. This is as opposed to the company assigned code.
What	Personal/Commercial	A code used to identify a policy as personal or commercial lines.
What	Policy Age	The age of the policy.
What>Billing Account		

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Billing Account	Billing Account Number	The number of the account in the billing system, if different than the policy system.
Billing Account	Method of Payment	The manner that the insured makes payments on billing account balance.
Billing Account	Payment Plan	The payment schedule applied to a policy balance.
Billing Account	Payment Service	The Payment Service Code identifies the type of billing plan used for the policy.
What>Class		
Class	Class Code	A class code is a three to six character field used to classify the general characteristics of an employees function. Used for rating.
Class	Class State	The state associated with the insured address.
Class	Primary Class Code	In a situation where the class code is split into more than one useful breakout, this is the primary portion.
Class	Secondary Class Code	In a situation where the class code is split into more than one useful breakout, this is the secondary portion.
What>Coverage		
Coverage	Annual Statement Line	A code that indicates in which line of the annual statement a transaction belongs.
Coverage	Bureau Report Plan	Indicates the statistical plan code used for bureau reporting.
Coverage	Coverage	This field reports a code based on the type of coverage afforded on the insurance line policy. The aggregate of risks covered by the terms of a contract of insurance.
Coverage	Coverage Category	A way to group coverages within a line of business.
Coverage	Coverage Effective Date	The calendar date when the policy coverage begins.
Coverage	Coverage Expiration Date	The calendar date when the policy coverage ends.
Coverage	Coverage Part	An indicator of a line of business within a package policy.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Coverage	Secondary Coverage	A client defined code to further breakdown the type of coverage afforded on the insurance line policy.
Coverage	Statistical Plan Code	This code identifies the Statistical Plan for coverage.
What>Deductible		
Deductible	Deductible	The amount of loss that the policyholder is responsible to pay.
Deductible	Deductible Applies To	This code is used to identify to what the deductible applies.
Deductible	Deductible Basis	This code represents the basis applied to determine the deductible.
Deductible	Deductible Type	This code represents the deductible type that pertains to a particular policy coverage.
What>Distribution Channel		
Distribution Channel	Distribution Channel Name	The full name of the distribution channel.
Distribution Channel	Distribution Channel Number	The number or other identifier assigned to the distribution channel.
Distribution Channel	Distribution Channel Type	The classification of the activities of a distribution channel.
Distribution Channel	Typical Commission Rate	The rate of commission given to a producer for a sale of a policy unless the commission rate is overridden.
What>Group Program		
Group Program	Group Program Anniversary Date	The calendar date that identifies the anniversary of a group program.
Group Program	Group Program Dividend Date	The calendar date that identifies the Dividend Date of a group program.
Group Program	Group Program Dividend Plan	The classification of the manner in which a group program Dividend is paid.
Group Program	Group Program Member Count	This number identifies the group program.
Group Program	Group Program Name	The name of the program, other than state or national, that a group of policies are associated with.
Group Program	Group Program Natural Name	The name of the national program that a group of policies are associated with.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Group Program	Group Program Original Date	The calendar date that identifies group program origination date.
Group Program	Group Program State	The state associated with group program.
Group Program	Group Program Status	The description of the current condition of a program with which a group of policies is associated.
Group Program	Group Program Type	The type of program that is represented.
What>Limit		
Limit	First Limit	The first limit of coverage for each type of coverage.
Limit	Full Limit	The limit associated with the coverage code.
Limit	Limit Applies To	A code identifying to what the limit applies.
Limit	Limit Basis	The code for basis to which the limit applies.
Limit	Limit Type	The code that describes a limit.
Limit	Second Limit	The second limit of coverage for each type of coverage.
Limit	Third Limit	The third limit of coverage for each type of coverage.
Limit	Valuation Code	This code reports the valuation of the limit of coverage for each type of coverage.
What>Line of Business		
Line of Business	Company Product Code	A company-unique code indicating the product classification of this policy. The source of this code list is the individual carriers.
Line of Business	Line of Business	A code used to represent the Line of Business.
Line of Business	Line of Business System Code	This system code represents a system line of business.
Line of Business	Line of Business Sub Code	A further breakdown of Line of Business. May be defined by company.
Line of Business	Monoline/Package	A code that tells if a policy is a monoline policy or is written as part of a package.
Line of Business	Policy Type	An additional way to categorize policies.
Line of Business	Policy Type Category	An additional way to categorize policies based on client specifications.
What>Reinsurance Contract		

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Reinsurance Contract	Reinsurance Contract Begin Date	The calendar date that identifies when reinsurance contract begins.
Reinsurance Contract	Reinsurance Contract Ceded Loss Ratio	The ratio of losses and loss adjustment expenses incurred to premiums earned for the portion of exposure that is transferred to a reinsurance company.
Reinsurance Contract	Reinsurance Contract Category	The Category of the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Cession Number	The unique identifier of the reinsurance contract cession.
Reinsurance Contract	Reinsurance Contract Certificate Number	The unique identifier assigned to the reinsurance contract certificate.
Reinsurance Contract	Reinsurance Contract End Date	The calendar date reinsurance contract ends.
Reinsurance Contract	Reinsurance Contract Facultative Commission Percent	The percentage commission paid to Reinsurer.
Reinsurance Contract	Reinsurance Contract Layer	The reinsurance contract Layer describes the amount of reinsurance provided in the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Type	The contract type for reinsurance contract dimension.
Reinsurance Contract	Reinsurance Contract Treaty Number	A unique identifier assigned to a reinsurance contract treaty.
When		
When	Calendar Month	The numeric representation of the month (1-12).
When	Calendar Month Name	The name of a month (Jan, Feb, etc.).
When	Calendar Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Calendar Quarter Name	The name of a quarter (Q1 - Q4).
When	Calendar Year	The one-year period that begins on January 1 and ends on December 31.
When	Fiscal Month	The numeric representation of the month (1-12).
When	Fiscal Month Name	The name of a month (Jan, Feb, etc.).
When	Fiscal Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").

Table 19: Corporate Detail (Continued)

Category	Filter	Description
When	Fiscal Quarter Name	The name of a quarter (Q1 - Q4).
When	Fiscal Year	The year commencing with the effective date of the insurance policy or with an anniversary of that date.
Where		
Where	Insured City	The name of the city in the address.
Where	Insured County	The county in the address.
Where	Insured Country	The country code in the address.
Where	Insured District	The geographical district where the insured is located.
Where	Insured Latitude	The latitude location of the insured's address.
Where	Insured Longitude	The longitude location of the insured's address.
Where	Insured Postal Code	The full postal zip code as defined by company specifications.
Where	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Insured Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Where	Insured Region	The geographical region where insured is located.
Where	Insured State	The state of the insured's location.
Where	Insured Territory	The territory of the insured's location.
Where	Location of Loss City	The city where the loss occurred.
Where	Location of Loss County	The county where the loss occurred.
Where	Location of Loss Country	The country where the loss occurred.
Where	Location of Loss County	The county where the loss occurred.
Where	Location of Loss District	The district where the loss occurred.
Where	Location of Loss Latitude	The latitude location where the loss occurred.
Where	Location of Loss Longitude	The longitude location where the loss occurred.
Where	Location of Loss Postal Code	The full postal zip code as defined by company specifications.
Where	Location of Loss Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Where	Location of Loss Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code. This is the sub code of the location where the loss occurred.
Where	Location of Loss Region	The geographical region where a loss occurred.
Where	Location of Loss State	The state where a loss occurred.
Where	Location of Loss Tax Location ID	The Tax Location Identifier of the location where a loss occurred.
Where	Location of Loss Territory	The territory where a loss occurred.
Additional Filters>Claim Detail		
Claim Detail	Case Made Retroactive Date	The calendar date that the claim case was made retroactive.
Claim Detail	Case Management Assigned Date	The calendar date that claim management is assigned to claim.
Claim Detail	Claim Closed Date	The date on which the insurance company closed the claim.
Claim Detail	Claims Made Basis Code	The code identifies whether or not the claims made basis is being used for reporting of claims.
Claim Detail	Claim Number	A unique number assigned to each claim.
Claim Detail	Claim Open Date	The date a claim was opened.
Claim Detail	Claim Reclosed Date	The date a claim was closed after being reopened.
Claim Detail	Claim Reopened Date	The date on which a closed claim was changed to open status.
Claim Detail	Claim Report Class Code	The code describes the class code report class applicable to the claim, regardless of the class codes on the policy.
Claim Detail	Claim Reported By	The source of claim report.
Claim Detail	Claim Reported Date	The date the insured filed the claim with the insurance carrier.
Claim Detail	Claim Status	The process condition of a claim.
Claim Detail	First Claim Contact Date	The calendar date that the claimant was first contacted by the insuring company or its representative.
Claim Detail	First Claim Payment Date	The calendar date when the first payment was made on a claim.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Claim Detail	Fraud Claim Code	The code to indicate potential fraudulent claim based on adjusters' investigation.
Claim Detail	Last Claim Payment Date	The calendar date when the Last Claim Payment was issued.
Claim Detail	Last Salvage Payment Date	The calendar date when the last payment was made associated with salvage.
Claim Detail	Last Subrogation Payment Date	The calendar date when Last Subrogation Payment was received.
Claim Detail	Loss Date	The date on which an accident or loss occurred regardless of when the claim was filed.
Claim Detail	Loss Month	The month that the claim loss period began.
Claim Detail	Loss Quarter	The quarter that the claim loss period began.
Claim Detail	Loss Time	The number that identifies the time a loss occurred.
Claim Detail	Loss Year	The year that the claim loss period began.
Claim Detail	Number of Rental Days	The total count of days a replacement item is rented.
Claim Detail	Number of Repair Days	The total count of days required to repair an item.
Claim Detail	Number of Storage Days	The total count of days an item is stored.
Additional Filters>Policy Detail		
Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.
Policy Detail	Cancel Reason	The system code describes the reason for a cancellation.
Policy Detail	Exposure Basis	The denomination in which the exposure units are expressed.
Policy Detail	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
Policy Detail	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
Policy Detail	Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
Policy Detail	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
Policy Detail	Package Discount Percent	The percentage of premium waived when Package Discount applies.
Policy Detail	Package Modification Assignment Code	This code indicates the package modification assignment.
Policy Detail	Package Modification Assignment Factor	The percentage of premium waived as a result of packaging coverages.
Policy Detail	Policy Age	The number of months in policy term.
Policy Detail	Policy Cancellation Date	The date a policy or coverage was terminated by cancellation.
Policy Detail	Policy Effective Date	The effective date of the policy related to this transaction.
Policy Detail	Policy Expiration Date	The expiration date of the policy related to this transaction.
Policy Detail	Policy Number	A unique client-assigned number identifying each policy.
Policy Detail	Policy Type	The description of the type of coverage included in a policy.
Policy Detail	Policy Type Category	The categorization of the type of coverage a policy includes.
Policy Detail	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
Policy Detail	Premium Basis	The basis to which rates are applied to determine premiums.
Policy Detail	Renewal Term	The length of the renewal policy period (term) in months.
Policy Detail	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.
Policy Detail	Supporting Business Type Discount	The percentage of premium waived when supporting business discount applies.
Additional Filters>Cancelled/Effective/Expired/Inforce/Retained/Written Policy Detail		
Cancelled Policy Detail, Effective Policy Detail, Expired Policy Detail, Inforce Policy Detail, Retained Policy Detail, Written Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
	Cancel Reason	The system code describes the reason for a cancellation.
	Exposure Basis	The denomination in which the exposure units are expressed.
	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
	Package Discount Percent	The percentage of premium waived when Package Discount applies.
	Package Modification Assignment Code	This code indicates the package modification assignment.
	Package Modification Factor	The percentage of premium waived as a result of packaging coverages.
	Policy Cancellation Date	The date a policy or coverage was terminated by cancellation.
	Policy Effective Date	The effective date of the policy related to this transaction.
	Policy Expiration Date	The expiration date of the policy related to this transaction.
	Policy Number	A unique client-assigned number identifying each policy.
	Policy Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
	Policy Type	The description of the type of coverage included in a policy.
	Policy Type Category	The categorization of the type of coverage a policy includes.
	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
	Premium Basis	The basis to which rates are applied to determine premiums.
	Renewal Term	The length of the renewal policy period (term) in months.

Table 19: Corporate Detail (Continued)

Category	Filter	Description
	Supporting Business Discount Percent	The percentage of premium waived when supporting business discount applies.
	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.

DWELLING FIRE

Table 20: Dwelling Fire

Category	Filter	Description
Who	Assistant Underwriter	The name of the assistant underwriter.
Who	Assistant Underwriter Number	A unique number assigned to an assistant underwriter.
Who	Company Name	The name of the company associated with the policy.
Who	Company Type	A code used to represent the type of company.
Who	Distribution Channel Name	The name used to represent the distribution channel.
Who	Distribution Channel Type	A code used to represent the type of distribution channel.
Who	Group Program	The code used to represent the program that a group of policies are associated with.
Who	Group Program Type	The type of program that is represented.
Who	Producer Name	The name of the producer.
Who	Producer Number	The number used to represent the producer.
Who	Producer Type	The code used to represent the producer type.
Who	Sub Producer Name	The name of an individual producer within an insurance agency.
Who	Sub Producer Number	The number used to represent the sub producer.
Who	Sub Producer Type	The code used to represent the sub producer type.
Who	Underwriter Name	The name of the underwriter.
Who	Underwriter Number	A unique number assigned to an underwriter.
Who	Underwriter Type	The classification of the underwriter's role.
Who>Assistant Underwriter		
Assistant Underwriter	Assistant Underwriter Birth Date	The assistant underwriter's birth date.
Assistant Underwriter	Assistant Underwriter City	The city where the assistant underwriter lives.
Assistant Underwriter	Assistant Underwriter Contact	The description of the contact method for the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Contact Type	The contact method for the assistant underwriter.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter County	The county of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Country	The country of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter District	The district of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Government ID Number	The government-issued identifier issued to the assistant underwriter. For example, in the USA it is SSN or FEIN.
Assistant Underwriter	Assistant Underwriter Latitude	The latitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Longitude	The longitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Name	The name of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Number	The number or other identifier that identifies the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Postal Code	The full postal zip code as defined by company specifications.
Assistant Underwriter	Assistant Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Assistant Underwriter	Assistant Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Assistant Underwriter	Assistant Underwriter Present Employment Start Year	The calendar year that the assistant underwriter began employment at current employer.
Assistant Underwriter	Assistant Underwriter Region	The geographical region of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter State	The state of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Tax Location ID	The Tax Location Identifier for the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Territory	The territory of the assistant underwriter's location.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter Type	The classification of the assistant underwriter's role.
Who>Insurance Company		
Insurance Company	Insurance Company AM Best Number	The number or other identifier that identifies the insurance company AM Best Rating.
Insurance Company	Insurance Company Business Start Date	The calendar date when the insurance company began business operations.
Insurance Company	Insurance Company City	The city where the insurance company is located.
Insurance Company	Insurance Company Contact	The description of the insurance company Contact Type.
Insurance Company	Insurance Company Contact Type	The contact method for the insurance company.
Insurance Company	Insurance Company County	The county where insurance company is located.
Insurance Company	Insurance Company Country	The country where the insurance company is located.
Insurance Company	Insurance Company DBA	The operational name (Doing Business As) of an insurance company.
Insurance Company	Insurance Company District	The district where the insurance company is located.
Insurance Company	Insurance Company Government ID Number	The government-issued identifier issued to the insurance company. For example, in the USA it is SSN or FEIN.
Insurance Company	Insurance Company ISO Code	The insurance company's Insurance Service Office (ISO) Code.
Insurance Company	Insurance Company Latitude	The latitude location of insurance company.
Insurance Company	Insurance Company Longitude	The longitude location of insurance company
Insurance Company	Insurance Company Name	The name of the insurance company.
Insurance Company	Insurance Company NAIC Code	The North America Industry Class System (NAICS) Code assigned to insurance company.
Insurance Company	Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Insurance Company	Insurance Company NAICS Code	The North America Industry Class System (NAICS) Code assigned to insurance company.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Insurance Company	Insurance Company Nature of Business	The type or category of the business activities done by the insurance company.
Insurance Company	Insurance Company Number of Employees	The count of people employed at the insurance company.
Insurance Company	Insurance Company Postal Code	The full postal zip code as defined by the insurance company specifications.
Insurance Company	Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Insurance Company	Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Insurance Company	Insurance Company Region	The geographical region where the insurance company is located.
Insurance Company	Insurance Company State	The state where the insurance company is located.
Insurance Company	Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insurance company.
Insurance Company	Insurance Company Tax Location ID	The Tax Location Identifier for the insurance company's location.
Insurance Company	Insurance Company Territory	The territory where the insurance company is located.
Insurance Company	Insurance Company Type	The classification of the insurance company's primary operations.
Who>Insured		
Insured	Insured Audit Frequency	The indicator of when an insured audit is scheduled.
Insured	Insured Audit Type	The classification of the audit activities conducted on insured.
Insured	Insured Birth Date	The calendar date when insured was born.
Insured	Insured Business Start Date	The calendar date when the insured business operations began.
Insured	Insured Contact	The description of the insured's contact type.
Insured	Insured Contact Type	The contact method for the insured.
Insured	Insured County	The county in the address.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Insured	Insured Country	The country code in the address.
Insured	Insured Credit Score	The code or number that represents the insured credit rating score.
Insured	Insured DBA	The operational name (Doing Business As) of an insured's business.
Insured	Insured Gender	The gender (Male or Female) of the insured.
Insured	Insured Government ID Number	The government-issued identifier issued to the insured. For example, in the USA it is SSN or FEIN.
Insured	Insured Marital Status	The present marital condition (single, married, divorced, widowed) of the insured.
Insured	Insured Name	The full name of the insured.
Insured	Insured NAICS Code	The North America Industry Class System (NAICS) Code assigned to insured.
Insured	Insured Nature of Business	The type or category of the business activities done by the insured.
Insured	Insured Number of Employees	The count of people employed by insured.
Insured	Insured Present Employment Start Year	The calendar year that the insured began working for their current employer.
Insured	Insured Prior Insurance Company	The name of insurance company that last provided insurance prior to policy inception.
Insured	Insured Report Period	The description of the timeframe of activities considered in an insured report
Insured	Insured Risk Grade	This code represents the AM Best or company defined risk grade for insured.
Insured	Insured SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insured.
Insured	Insured Type	The type of entity that contracted with insurance company to obtain a policy.
Who>Parent Insurance Company		
Parent Insurance Company	Parent Insurance Company AM Best Number	The number or other identifier that identifies the parent insurance company AM Best Rating.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Parent Insurance Company	Parent Insurance Company Business Start Date	The calendar date when the parent insurance company began business operations.
Parent Insurance Company	Parent Insurance Company City	The city where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Contact	The description of the parent insurance company Contact Type.
Parent Insurance Company	Parent Insurance Company Contact Type	The contact method for the parent insurance company.
Parent Insurance Company	Parent Insurance Company County	The county where parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Country	The country where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company DBA	The operational name (Doing Business As) of an parent insurance company.
Parent Insurance Company	Parent Insurance Company District	The district where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Government ID Number	The government-issued identifier issued to the parent insurance company. For example, in the USA it is SSN or FEIN.
Parent Insurance Company	Parent Insurance Company ISO Code	The parent insurance company's Insurance Service Office (ISO) Code.
Parent Insurance Company	Parent Insurance Company Latitude	The latitude location of parent insurance company.
Parent Insurance Company	Parent Insurance Company Longitude	The longitude location of insurance company
Parent Insurance Company	Parent Insurance Company Name	The name of the parent insurance company.
Parent Insurance Company	Parent Insurance Company NAIC Code	The North America Industry Class System (NAICS) Code assigned to parent insurance company.
Parent Insurance Company	Parent Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Parent Insurance Company	Parent Insurance Company NAICS Code	The North America Industry Class System (NAICS) Code assigned to parent insurance company.
Parent Insurance Company	Parent Insurance Company Nature of Business	The type or category of the business activities done by the parent insurance company.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Parent Insurance Company	Parent Insurance Company Number of Employees	The count of people employed at the parent insurance company.
Parent Insurance Company	Parent Insurance Company Postal Code	The full postal zip code as defined by the parent insurance company specifications.
Parent Insurance Company	Parent Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Parent Insurance Company	Parent Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Parent Insurance Company	Parent Insurance Company Region	The geographical region where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the parent insurance company.
Parent Insurance Company	Parent Insurance Company State	The state where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Tax Location ID	The Tax Location Identifier for the parent insurance company's location.
Parent Insurance Company	Parent Insurance Company Territory	The territory where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Type	The classification of the parent insurance company's primary operations.
Who>Producer		
Producer	Producer Birth Date	The calendar date that details when is a producer's Date of Birth.
Producer	Producer Business Start Date	The calendar date when the producer began business operations.
Producer	Producer City	The city where the producer is located.
Producer	Producer Contact	The description of a producer's contact method.
Producer	Producer Contact Type	The contact method for a producer.
Producer	Producer County	The county where the producer is located.
Producer	Producer Country	The country where the producer is located.
Producer	Producer DBA	The operational name (Doing Business As) of a producer's Business

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Producer	Producer District	The district where the producer is located.
Producer	Producer Effective Date	The calendar date the producer appointment begins.
Producer	Producer Gender	The gender (Male or Female) of the producer.
Producer	Producer Government ID Number	The government-issued identifier issued to the producer. For example, in the USA it is SSN or FEIN.
Producer	Producer Latitude	The latitude location of the producer.
Producer	Producer Longitude	The longitude location of the producer.
Producer	Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the producer.
Producer	Producer Name	The full name of the producer.
Producer	Producer NAICS Code	North America Industry Class System (NAICS) Code issued to producer.
Producer	Producer Nature of Business	The type or category of the business activities done by the producer.
Producer	Producer Number of Employees	The count of people employed by producer.
Producer	Producer Postal Code	The full postal zip code as defined by company specifications.
Producer	Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Producer	Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Producer	Producer Present Employment Start Year	The year when the producer began working for their current employer.
Producer	Producer Region	The geographical region where producer is located.
Producer	Producer Relationship Code	The code that identifies the producer relationship.
Producer	Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the producer.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Producer	Producer State	The state where producer is located.
Producer	Producer State License Number	The government-issued license number issued to the producer.
Producer	Producer Tax Location ID	The Tax Location Identifier for the producer's location
Producer	Producer Territory	The territory where producer is located
Producer	Producer Type	This code represents the producer type.
Who>Reinsurance Company		
Reinsurance Company	Reinsurance Company Business Start Date	The calendar date when the reinsurance company began business operations.
Reinsurance Company	Reinsurance Company City	The city where reinsurance company is located.
Reinsurance Company	Reinsurance Company Contract	The description of the reinsurance company Contract.
Reinsurance Company	Reinsurance Company Contact Type	The contact method for reinsurance company.
Reinsurance Company	Reinsurance Company County	The county where reinsurance company is located.
Reinsurance Company	Reinsurance Company Country	The country where reinsurance company is located.
Reinsurance Company	Reinsurance Company DBA	The operational name (Doing Business As) of a reinsurance company.
Reinsurance Company	Reinsurance Company District	The district where reinsurance company is located.
Reinsurance Company	Reinsurance Company Latitude	The latitude location of reinsurance company.
Reinsurance Company	Reinsurance Company Longitude	The longitude location of reinsurance company.
Reinsurance Company	Reinsurance Company NAICS Code	The North America Industry Class System (NAICS) Code assigned to the reinsurance Company.
Reinsurance Company	Reinsurance Company Name	The name of the reinsurance company.
Reinsurance Company	Reinsurance Company Nature of Business	The type or category of the business activities done by the reinsurance company.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company Number	Identifier assigned to the reinsurance Company.
Reinsurance Company	Reinsurance Company Number of Employees	The count of people employed by the reinsurance Company.
Reinsurance Company	Reinsurance Company Postal Code	The full postal zip code as defined by company specifications.
Reinsurance Company	Reinsurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Reinsurance Company	Reinsurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Reinsurance Company	Reinsurance Company Region	The geographical region of reinsurance company.
Reinsurance Company	Reinsurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company State	The state where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Tax Location Identifier	The Tax Location Identifier of the reinsurance company's location.
Reinsurance Company	Reinsurance Company Territory	The territory where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Type Code	The code that identifies reinsurance company type.
Who>Sub Producer		
Sub Producer	Sub Producer Birth Date	The calendar date that details when is a sub producer's Date of Birth.
Sub Producer	Sub Producer Business Start Date	The calendar date when the sub producer began business operations.
Sub Producer	Sub Producer City	The city where the sub producer is located.
Sub Producer	Sub Producer Contact	The description of a sub producer's contact method.
Sub Producer	Sub Producer Contact Type	The contact method for a sub producer.
Sub Producer	Sub Producer County	The county where the sub producer is located.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Sub Producer	Sub Producer Country	The country where the sub producer is located.
Sub Producer	Sub Producer DBA	The operational name (Doing Business As) of a sub producer's Business
Sub Producer	Sub Producer District	District where the sub producer is located.
Sub Producer	Sub Producer Effective Date	The calendar date the sub producer appointment begins.
Sub Producer	Sub Producer Gender	The gender (Male or Female) of the sub producer.
Sub Producer	Sub Producer Government ID Number	The government-issued identifier issued to the sub producer. For example, in the USA it is SSN or FEIN.
Sub Producer	Sub Producer Latitude	The latitude location of sub producer.
Sub Producer	Sub Producer Longitude	The longitude location of sub producer.
Sub Producer	Sub Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the sub producer.
Sub Producer	Sub Producer NAICS Code	North America Industry Class System (NAICS) Code issued to sub producer.
Sub Producer	Sub Producer Name	The full name of the sub producer.
Sub Producer	Sub Producer Nature of Business	The type or category of the business activities done by the sub producer.
Sub Producer	Sub Producer Number of Employees	The count of people employed by sub producer.
Sub Producer	Sub Producer Postal Code	The full postal zip code as defined by company specifications.
Sub Producer	Sub Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Sub Producer	Sub Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Sub Producer	Sub Producer Present Employment Start Year	Year when sub producer began working for their current employer.
Sub Producer	Sub Producer Region	The geographical region where the sub producer is located.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Sub Producer	Sub Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the sub producer.
Sub Producer	Sub Producer State	The state where the sub producer is located.
Sub Producer	Sub Producer State_LIC_Number	Government-issued license number issued to sub producer.
Sub Producer	Sub Producer Tax Location ID	The Tax Location Identifier for the sub producer's location
Sub Producer	Sub Producer Territory	The territory where the sub producer is located
Sub Producer	Sub Producer Type	This code represents the sub producer type Standard Code
Who>Underwriter		
Underwriter	Underwriter Birth Date	The underwriter's birth date.
Underwriter	Underwriter City	The city where the underwriter lives.
Underwriter	Underwriter Contact	The description of the contact method for the underwriter.
Underwriter	Underwriter Contact Type	The contact method for the underwriter.
Underwriter	Underwriter County	The county of the underwriter's location.
Underwriter	Underwriter Country	The country of the underwriter's location.
Underwriter	Underwriter District	The district of the underwriter's location.
Underwriter	Underwriter Government ID Number	The government-issued identifier issued to the assistant underwriter. For example, in the USA it is SSN or FEIN.
Underwriter	Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Underwriter	Underwriter Latitude	The latitude location of the underwriter.
Underwriter	Underwriter Longitude	The longitude location of the underwriter.
Underwriter	Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the underwriter.
Underwriter	Underwriter Name	The name of the underwriter.
Underwriter	Underwriter Number	The number or other identifier that identifies the underwriter.
Underwriter	Underwriter Postal Code	The full postal zip code as defined by company specifications.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Underwriter	Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Underwriter	Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Underwriter	Underwriter Present Employment Start Year	The calendar year that the underwriter began employment at current employer.
Underwriter	Underwriter Region	The geographical region of the underwriter's location.
Underwriter	Underwriter State	The state of the underwriter's location.
Underwriter	Underwriter Tax Location ID	The Tax Location Identifier for the underwriter's location.
Underwriter	Underwriter Territory	The territory of the underwriter's location.
Underwriter	Underwriter Type	The classification of the underwriter's role.
What		
What	Annual Statement Line	A code that indicates in which line of the annual statement a transaction belongs.
What	Class	A class code is a three to six character field used to classify the general characteristics of an employees function. Used for rating.
What	Class State	The state associated with the insured address.
What	Coverage	This field reports a code based on the type of coverage afforded on the insurance line policy. The aggregate of risks covered by the terms of a contract of insurance.
What	Currency Code	This system code identifies document currency.
What	Deductible	The amount of loss that the policyholder is responsible to pay.
What	Full Limit	The limit associated with the coverage code.
What	Policy Age	Number of months in policy term.
What	Primary Class Code	In a situation where the class code is split into more than one useful breakout, this is the primary portion.
What	Secondary Class Code	In a situation where the class code is split into more than one useful breakout, this is the secondary portion.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
What	Subline	This code is used for reporting under the ISO Commercial Statistical Plan.
What>Billing Account		
Billing Account	Billing Account Number	The number of the account in the billing system, if different than the policy system.
Billing Account	Method of Payment	The manner that the insured makes payments on billing account balance.
Billing Account	Payment Plan	The payment schedule applied to a policy balance.
Billing Account	Payment Service	The Payment Service Code identifies the type of billing plan used for the policy.
What>Class		
Class	Class Code	A class code is a three to six character field used to classify the general characteristics of an employees function. Used for rating.
Class	Class State	The state associated with the insured address.
Class	Primary Class Code	In a situation where the class code is split into more than one useful breakout, this is the primary portion.
Class	Secondary Class Code	In a situation where the class code is split into more than one useful breakout, this is the secondary portion.
What>Coverage		
Coverage	Annual Statement Line	A code that indicates in which line of the annual statement a transaction belongs.
Coverage	Bureau Report Plan	Indicates the statistical plan code used for bureau reporting.
Coverage	Coverage	This field reports a code based on the type of coverage afforded on the insurance line policy. The aggregate of risks covered by the terms of a contract of insurance.
Coverage	Coverage Category	A way to group coverages within a line of business.
Coverage	Coverage Effective Date	The calendar date when the policy coverage begins.
Coverage	Coverage Expiration Date	The calendar date when the policy coverage ends.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Coverage	Coverage Part	An indicator of a line of business within a package policy.
Coverage	Secondary Coverage	A client defined code to further breakdown the type of coverage afforded on the insurance line policy.
Coverage	Statistical Plan Code	This code identifies the Statistical Plan for coverage.
What>Deductible		
Deductible	Deductible	The amount of loss that the policyholder is responsible to pay.
Deductible	Deductible Applies To	This code is used to identify to what the deductible applies.
Deductible	Deductible Basis	This code represents the basis applied to determine the deductible.
Deductible	Deductible Type	This code represents the deductible type that pertains to a particular policy coverage.
What>Distribution Channel		
Distribution Channel	Distribution Channel Name	The full name of the distribution channel.
Distribution Channel	Distribution Channel Number	The number or other identifier assigned to the distribution channel.
Distribution Channel	Distribution Channel Type	The classification of the activities of a distribution channel.
Distribution Channel	Typical Commission Rate	The rate of commission given to a producer for a sale of a policy unless the commission rate is overridden.
What>Dwelling Fire Dwelling		
Dwelling Fire Dwelling	Dwelling Fire Area	The total area measurement of the insured property.
Dwelling Fire Dwelling	Dwelling Fire Aluminum Wiring Flag	The yes/no indicator identifying the presence or absence of aluminum wiring.
Dwelling Fire Dwelling	Dwelling Fire Circuit Breakers Flag	The yes/no indicator identifying the presence or absence of circuit breakers.
Dwelling Fire Dwelling	Dwelling Fire City Limits Code	This code describes if a dwelling is located within or outside city limit boundary.
Dwelling Fire Dwelling	Dwelling Fire Condition	The classification detailing the maintenance condition of a dwelling.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Dwelling Fire Dwelling	Dwelling Fire Construction Type	The description of the primary dwelling exterior construction materials.
Dwelling Fire Dwelling	Dwelling Fire Distance to Fire Hydrant	The distance from dwelling to nearest fire hydrant location.
Dwelling Fire Dwelling	Dwelling Fire Distant to Fire Station	The distance from dwelling to nearest fire station location.
Dwelling Fire Dwelling	Dwelling Fire Electricity Update Type	The classification that describes changes to electrical system after the original construction.
Dwelling Fire Dwelling	Dwelling Fire Electricity Update Year	The calendar year of the last update of dwelling electrical system.
Dwelling Fire Dwelling	Dwelling Fire Fire District	The fire department response district assigned to a dwelling location.
Dwelling Fire Dwelling	Dwelling Fire Fire Protection Class	The code describes the fire protection services available at dwelling location.
Dwelling Fire Dwelling	Dwelling Fire Foundation Type	The construction method used to construct dwelling foundation.
Dwelling Fire Dwelling	Dwelling Fire Fuses Flag	The yes/no indicator identifying the presence or absence of fuses.
Dwelling Fire Dwelling	Dwelling Fire Gas Update Type	The changes to the gas system after the original construction
Dwelling Fire Dwelling	Dwelling Fire Gas Update Year	The calendar year of the last update of dwelling gas system.
Dwelling Fire Dwelling	Dwelling Fire Heat Update Type	The changes to the heating system after the original construction.
Dwelling Fire Dwelling	Dwelling Fire Heat Update Year	The calendar year of the last update of dwelling heating system.
Dwelling Fire Dwelling	Dwelling Fire Location City	The city where the dwelling is located.
Dwelling Fire Dwelling	Dwelling Fire Location County	The county where the dwelling is located.
Dwelling Fire Dwelling	Dwelling Fire Location Country	The country where the dwelling is located.
Dwelling Fire Dwelling	Dwelling Fire Location District	The district where the dwelling is located.
Dwelling Fire Dwelling	Dwelling Fire Location Latitude	The latitude location of the dwelling location.
Dwelling Fire Dwelling	Dwelling Fire Location Longitude	The longitude location of the dwelling location.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Dwelling Fire Dwelling	Dwelling Fire Location Number	This number identifies the Dwelling Fire Dwelling Location Number.
Dwelling Fire Dwelling	Dwelling Fire Location Postal Code	The full postal zip code as defined by company specifications.
Dwelling Fire Dwelling	Dwelling Fire Location Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Dwelling Fire Dwelling	Dwelling Fire Location Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Dwelling Fire Dwelling	Dwelling Fire Location Region	The geographical region where dwelling is located.
Dwelling Fire Dwelling	Dwelling Fire Location State	The state associated with dwelling location.
Dwelling Fire Dwelling	Dwelling Fire Location Tax Location ID	The Tax Location Identifier of the dwelling location.
Dwelling Fire Dwelling	Dwelling Fire Location Territory	The territory where dwelling is located.
Dwelling Fire Dwelling	Dwelling Fire Market Value	The average price of similar dwellings recently sold in same real estate market.
Dwelling Fire Dwelling	Dwelling Fire Mine Subsidence Flag	The yes/no indicator identifying the presence or absence of mine subsidence coverage.
Dwelling Fire Dwelling	Dwelling Fire Name of Owner	The name of the owner of the property.
Dwelling Fire Dwelling	Dwelling Fire Number of Electricity System Amps	Number that represents the electrical current capacity of electrical system.
Dwelling Fire Dwelling	Dwelling Fire Number of Families	The total count of individual family units in single dwelling. For example, a duplex would have 2 families.
Dwelling Fire Dwelling	Dwelling Fire Number of Rooms	The total count of rooms contained in all units of dwelling.
Dwelling Fire Dwelling	Dwelling Fire Number of Stories	The total count of Building Floor Levels contained in dwelling.
Dwelling Fire Dwelling	Dwelling Fire Number of Weeks Rented	This number identifies the Number of Weeks Rented per Calendar Year.
Dwelling Fire Dwelling	Dwelling Fire Occupancy Type	The attributes of occupants of the dwelling. For example, owner and tenant occupants.
Dwelling Fire Dwelling	Dwelling Fire Personal Property in Mercantile Building Flag	The yes/no indicator identifying the presence or absence of personal property stored in a mercantile building

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Dwelling Fire Dwelling	Dwelling Fire Plumbing Update Type	The classification detailing changes to plumbing system after the original construction.
Dwelling Fire Dwelling	Dwelling Fire Property Lot Size	The total area measurement of the land within the property lot boundaries.
Dwelling Fire Dwelling	Dwelling Fire Purchase Date	The calendar date that identifies Dwelling Purchase Date.
Dwelling Fire Dwelling	Dwelling Fire Purchase Price	The monetary amount paid when commercial dwelling was purchased.
Dwelling Fire Dwelling	Dwelling Fire Replacement Cost	The amount it would cost to replace a dwelling at current prices with like materials.
Dwelling Fire Dwelling	Dwelling Fire Roof Material	The roofing material used on the dwelling roof.
Dwelling Fire Dwelling	Dwelling Fire Roof Update Type	The classification detailing changes to roofing materials after the original construction.
Dwelling Fire Dwelling	Dwelling Fire Roof Update Year	The calendar year of the last update of dwelling roofing materials.
Dwelling Fire Dwelling	Dwelling Fire Secondary Heat Type	The classification of the secondary source of heat for commercial dwelling.
Dwelling Fire Dwelling	Dwelling Fire Type	The classification that identifies the dwelling unit construction. For example, single-family, multi-family, warehouse, etc.
Dwelling Fire Dwelling	Dwelling Fire Under Construction Type	This code indicates active construction activities on the dwelling.
Dwelling Fire Dwelling	Dwelling Fire Wiring Update Type	The classification detailing changes to wiring system after the original construction.
Dwelling Fire Dwelling	Dwelling Fire Year Built	The calendar Year that Dwelling Fire Dwelling was constructed.
What>Group Program		
Group Program	Group Program Anniversary Date	The calendar date that identifies the anniversary of a group program.
Group Program	Group Program Dividend Date	The calendar date that identifies the dividend date of a group program.
Group Program	Group Program Dividend Plan	The classification of the manner in which a group program Dividend is paid.
Group Program	Group Program Member Count	This number identifies the group program.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Group Program	Group Program Name	The name of the program, other than state or national, that a group of policies are associated with.
Group Program	Group Program Natural Name	The name of the national program that a group of policies are associated with.
Group Program	Group Program Original Date	The calendar date that identifies group program origination date.
Group Program	Group Program State	The state associated with group program.
Group Program	Group Program Status	The description of the current condition of a program with which a group of policies is associated.
Group Program	Group Program Type	The type of program that is represented.
What>Reinsurance Contract		
Reinsurance Contract	Reinsurance Contract Begin Date	The calendar date that identifies when reinsurance contract begins.
Reinsurance Contract	Reinsurance Contract Ceded Loss Ratio	The ratio of losses and loss adjustment expenses incurred to premiums earned for the portion of exposure that is transferred to a reinsurance company.
Reinsurance Contract	Reinsurance Contract Category	The category of the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Cession Number	The unique identifier of the reinsurance contract cession.
Reinsurance Contract	Reinsurance Contract Certificate Number	The unique identifier assigned to the reinsurance contract certificate.
Reinsurance Contract	Reinsurance Contract End Date	The calendar date reinsurance contract ends.
Reinsurance Contract	Reinsurance Contract Facultative Commission Percent	The percentage commission paid to reinsurer.
Reinsurance Contract	Reinsurance Contract Layer	The amount of reinsurance provided in the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Treaty Number	A unique identifier assigned to a reinsurance contract treaty.
Reinsurance Contract	Reinsurance Contract Type	The contract type for reinsurance contract dimension.
When		
When	Calendar Month	The numeric representation of the month (1-12).

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
When	Calendar Month Name	The name of a month (Jan, Feb, etc.).
When	Calendar Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Calendar Quarter Name	The name of a quarter (Q1 - Q4).
When	Calendar Year	The one-year period that begins on January 1 and ends on December 31.
When	Fiscal Month	The numeric representation of the month (1-12).
When	Fiscal Month Name	The name of a month (Jan, Feb, etc.).
When	Fiscal Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Fiscal Quarter Name	The name of a quarter (Q1 - Q4).
When	Fiscal Year	The year commencing with the effective date of the insurance policy or with an anniversary of that date.
Where		
Where	Insured City	The name of the city in the address.
Where	Insured Country	The country code in the address.
Where	Insured County	The county in the address.
Where	Insured District	The geographical district where the insured is located.
Where	Insured Latitude	The latitude location of the insured's address.
Where	Insured Longitude	The longitude location of the insured's address.
Where	Insured Postal Code	The full postal zip code as defined by company specifications.
Where	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Insured Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Where	Insured Region	The geographical region where insured is located.
Where	Insured State	The state of the insured's location.
Where	Insured Territory	The territory of the insured's location.
Where	Location of Loss City	The city where the loss occurred.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Where	Location of Loss Country	The country where the loss occurred.
Where	Location of Loss County	The county where the loss occurred.
Where	Location of Loss District	The district where the loss occurred.
Where	Location of Loss Latitude	The latitude location where the loss occurred.
Where	Location of Loss Longitude	The longitude location where the loss occurred.
Where	Location of Loss Postal Code	The full postal zip code as defined by company specifications.
Where	Location of Loss Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Location of Loss Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code. This is the sub code of the location where the loss occurred.
Where	Location of Loss Region	The geographical region where a loss occurred.
Where	Location of Loss State	The state where a loss occurred.
Where	Location of Loss Tax Location ID	The Tax Location Identifier of the location where a loss occurred.
Where	Location of Loss Territory	The territory where a loss occurred.
Additional Filters>Claim Detail		
Claim Detail	Case Made Retroactive Date	The calendar date that the claim case was made retroactive.
Claim Detail	Case Management Assigned Date	The calendar date that claim management is assigned to claim.
Claim Detail	Claim Closed Date	The date on which the insurance company closed the claim.
Claim Detail	Claim Loss Date	The calendar date on which an accident or loss occurred regardless of when the claim was filed.
Claim Detail	Claim Number	A unique number assigned to each claim.
Claim Detail	Claim Opened Date	The date a claim was opened.
Claim Detail	Claim Reclosed Date	The date a claim was closed after being reopened.
Claim Detail	Claim Reopened Date	The date on which a closed claim was changed to open status.
Claim Detail	Claim Report Class Code	The code describes the class code report class applicable to the claim, regardless of the class codes on the policy.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Claim Detail	Claim Reported By	The source of claim report.
Claim Detail	Claim Reported Date	The date the insured filed the claim with the insurance carrier.
Claim Detail	Claim Status	The process condition of a claim.
Claim Detail	Claims Made Basis Code	The code identifies whether or not the claims made basis is being used for reporting of claims.
Claim Detail	First Claim Contact Date	The calendar date that the claimant was first contacted by the insuring company or its representative.
Claim Detail	First Claim Payment Date	The calendar date when the first payment was made on a claim.
Claim Detail	Fraud Claim Code	The code to indicate potential fraudulent claim based on adjusters' investigation.
Claim Detail	Last Claim Payment Date	The calendar date when the last claim payment was issued.
Claim Detail	Last Salvage Payment Date	The calendar date when the last payment was made associated with salvage.
Claim Detail	Last Subrogation Payment Date	The calendar date when Last Subrogation Payment was received.
Claim Detail	Loss Date	The calendar date on which an accident or loss occurred regardless of when the claim was filed.
Claim Detail	Loss Month	The month that the claim loss period began.
Claim Detail	Loss Quarter	The quarter that the claim loss period began.
Claim Detail	Loss Time	The number that identifies the time a loss occurred.
Claim Detail	Loss Year	The year that the claim loss period began.
Claim Detail	Number of Rental Days	The total count of days a replacement item is rented.
Claim Detail	Number of Repair Days	The total count of days required to repair an item.
Claim Detail	Number of Storage Days	The total count of days an item is stored.
Additional Filters>Policy Detail		
Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.
Policy Detail	Cancel Reason	The system code describes the reason for a cancellation.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Policy Detail	Exposure Basis	The denomination in which the exposure units are expressed.
Policy Detail	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
Policy Detail	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
Policy Detail	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
Policy Detail	Package Discount Percent	The percentage of premium waived when Package Discount applies.
Policy Detail	Package Modification Assignment Code	This code indicates the package modification assignment.
Policy Detail	Package Modification Factor	The percentage of premium waived as a result of packaging coverages.
Policy Detail	Policy Age	The number of months in policy term.
Policy Detail	Policy Cancellation Date	The date a policy or coverage was terminated by cancellation.
Policy Detail	Policy Effective Date	The effective date of the policy related to this transaction.
Policy Detail	Policy Expiration Date	The expiration date of the policy related to this transaction.
Policy Detail	Policy Number	A unique client-assigned number identifying each policy.
Policy Detail	Policy Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
Policy Detail	Policy Type	The description of the type of coverage included in a policy.
Policy Detail	Policy Type Category	The categorization of the type of coverage a policy includes.
Policy Detail	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
Policy Detail	Premium Basis	The basis to which rates are applied to determine premiums.
Policy Detail	Renewal Term	The length of the renewal policy period (term) in months.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
Policy Detail	Supporting Business Discount Percent	The percentage of premium waived when supporting business discount applies.
Policy Detail	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.
Additional Filters>Cancelled/Effective/Expired/Inforce/Retained/Written Policy Detail		
Cancelled Policy Detail, Effective Policy Detail, Expired Policy Detail, Inforce Policy Detail, Retained Policy Detail, Written Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.
	Cancel Reason	The system code describes the reason for a cancellation.
	Exposure Basis	The denomination in which the exposure units are expressed.
	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
	Package Discount Percent	The percentage of premium waived when Package Discount applies.
	Package Modification Assignment Code	This code indicates the package modification assignment.
	Package Modification Factor	The percentage of premium waived as a result of packaging coverages.
	Policy Cancellation Date	The date a policy or coverage was terminated by cancellation.
	Policy Effective Date	The effective date of the policy related to this transaction.
	Policy Expiration Date	The expiration date of the policy related to this transaction.
	Policy Number	A unique client-assigned number identifying each policy.

Table 20: Dwelling Fire (Continued)

Category	Filter	Description
	Policy Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
	Policy Type	The description of the type of coverage included in a policy.
	Policy Type Category	The categorization of the type of coverage a policy includes.
	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
	Premium Basis	The basis to which rates are applied to determine premiums.
	Renewal Term	The length of the renewal policy period (term) in months.
	Supporting Business Discount Percent	The percentage of premium waived when supporting business discount applies.
	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.

HOMEOWNERS

Table 21: Homeowners

Category	Filter	Description
Who	Assistant Underwriter	The name of the assistant underwriter.
Who	Assistant Underwriter Number	A unique number assigned to an assistant underwriter.
Who	Company Name	The name of the company associated with the policy.
Who	Company Type	A code used to represent the type of company.
Who	Distribution Channel Name	The name used to represent the distribution channel.
Who	Distribution Channel Type	A code used to represent the type of distribution channel.
Who	Group Program	The code used to represent the program that a group of policies are associated with.
Who	Group Program Type	The type of program that is represented.
Who	Producer Name	The name of the producer.
Who	Producer Number	The number used to represent the producer.
Who	Producer Type	The code used to represent the producer type.
Who	Sub Producer Name	The name of an individual producer within an insurance agency.
Who	Sub Producer Number	The number used to represent the sub producer.
Who	Sub Producer Type	The code used to represent the sub producer type.
Who	Underwriter Name	The name of the underwriter.
Who	Underwriter Number	A unique number assigned to an underwriter.
Who>Assistant Underwriter		
Assistant Underwriter	Assistant Underwriter Birth Date	The assistant underwriter's birth date.
Assistant Underwriter	Assistant Underwriter City	The city where the assistant underwriter lives.
Assistant Underwriter	Assistant Underwriter Contact	The description of the contact method for the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Contact Type	The contact method for the assistant underwriter.

Table 21: Homeowners (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter County	The county of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Country	The country of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter District	The district of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Government ID Number	The government-issued identifier issued to the assistant underwriter. For example, in the USA it is SSN or FEIN.
Assistant Underwriter	Assistant Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Latitude	The latitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Longitude	The longitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Name	The name of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Number	The number or other identifier that identifies the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Present Employment Start Year	The calendar year that the assistant underwriter began employment at current employer.
Assistant Underwriter	Assistant Underwriter Postal Code	The full postal zip code as defined by company specifications.
Assistant Underwriter	Assistant Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Assistant Underwriter	Assistant Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Assistant Underwriter	Assistant Underwriter Region	The geographical region of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter State	The state of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Tax Location ID	The Tax Location Identifier for the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Territory	The territory of the assistant underwriter's location.

Table 21: Homeowners (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter Type	The classification of the assistant underwriter's role.
Who>Insurance Company		
Insurance Company	Insurance Company AM Best Number	The number or other identifier that identifies the insurance company AM Best Rating.
Insurance Company	Insurance Company Business Start Date	The calendar date when the insurance company began business operations.
Insurance Company	Insurance Company City	The city where the insurance company is located.
Insurance Company	Insurance Company Contact	The description of the insurance company Contact Type.
Insurance Company	Insurance Company Contact Type	The contact method for the insurance company.
Insurance Company	Insurance Company Country	The country where the insurance company is located.
Insurance Company	Insurance Company County	The county where insurance company is located.
Insurance Company	Insurance Company DBA	The operational name (Doing Business As) of an insurance company.
Insurance Company	Insurance Company District	The district where the insurance company is located.
Insurance Company	Insurance Company Government ID Number	The government-issued identifier issued to the insurance company. For example, in the USA it is SSN or FEIN.
Insurance Company	Insurance Company ISO Code	The insurance company's Insurance Service Office (ISO) Code.
Insurance Company	Insurance Company Latitude	The latitude location of insurance company.
Insurance Company	Insurance Company Longitude	The longitude location of insurance company
Insurance Company	Insurance Company Name	The name of the insurance company.
Insurance Company	Insurance Company NAICS Code	The North America Industry Class System (NAICS) Code assigned to insurance company.
Insurance Company	Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Insurance Company	Insurance Company Nature of Business	The type or category of the business activities done by the insurance company.

Table 21: Homeowners (Continued)

Category	Filter	Description
Insurance Company	Insurance Company Number of Employees	The count of people employed at the insurance company.
Insurance Company	Insurance Company Postal Code	The full postal zip code as defined by the insurance company specifications.
Insurance Company	Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Insurance Company	Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Insurance Company	Insurance Company Region	The geographical region where the insurance company is located.
Insurance Company	Insurance Company State	The state where the insurance company is located.
Insurance Company	Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insurance company.
Insurance Company	Insurance Company Tax Location ID	The Tax Location Identifier for the insurance company's location.
Insurance Company	Insurance Company Territory	The territory where the insurance company is located.
Insurance Company	Insurance Company Type	The classification of the insurance company's primary operations.
Who>Insured		
Insured	Insured Audit Frequency	The indicator of when an insured audit is scheduled.
Insured	Insured Audit Type	The classification of the audit activities conducted on insured.
Insured	Insured Birth Date	The calendar date when insured was born.
Insured	Insured Business Start Date Identifier	The calendar date when the insured business operations began.
Insured	Insured City	The name of the city in the address
Insured	Insured Contact	The description of the insured's contact type.
Insured	Insured Contact Type	The Contact method for the insured.
Insured	Insured County	The county in the address.
Insured	Insured Country	The country code in the address.

Table 21: Homeowners (Continued)

Category	Filter	Description
Insured	Insured Credit Score	The code or number that represents the insured credit rating score.
Insured	Insured DBA	The operational name (Doing Business As) of an insured's business.
Insured	Insured Gender	The gender (Male or Female) of the insured.
Insured	Insured Government Identification Number	The government-issued identifier issued to the insured. For example, in the USA it is SSN or FEIN.
Insured	Insured Latitude	The latitude location of the insured's address.
Insured	Insured Longitude	The longitude location of the insured location.
Insured	Insured Marital Status	The present marital condition (single, married, divorced, widowed) of the insured.
Insured	Insured Name	The full name of the insured.
Insured	Insured NAICS Code	The North America Industry Class System (NAICS) Code assigned to insured.
Insured	Insured Nature of Business	The type or category of the business activities done by the insured.
Insured	Insured Number of Employees	The count of people employed by insured.
Insured	Insured Postal Code	The full postal zip code as defined by company specifications.
Insured	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code
Insured	Insured Postal SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Insured	Insured Present Employment Start Year	The calendar year that the insured began working for their current employer.
Insured	Insured Prior Insurance Company	Name of insurance company that last provided insurance prior to policy inception.
Insured	Insured Report Period	The description of the timeframe of activities considered in an insured report
Insured	Insured Risk Grade	This code represents the AM Best or company defined risk grade for insured.

Table 21: Homeowners (Continued)

Category	Filter	Description
Insured	Insured SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insured.
Insured	Insured Type	The type of entity that contracted with insurance company to obtain a policy.
Who>Parent Insurance Company		
Parent Insurance Company	Parent Insurance Company AM Best Number	The number or other identifier that identifies the parent insurance company AM Best Rating.
Parent Insurance Company	Parent Insurance Company Business Start Date	The calendar date when the parent insurance company began business operations.
Parent Insurance Company	Parent Insurance Company City	The city where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Contact	The description of the parent insurance company Contact Type.
Parent Insurance Company	Parent Insurance Company Contact Type	The contact method for the parent insurance company.
Parent Insurance Company	Parent Insurance Company County	The county where parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Country	The country where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company DBA	The operational name (Doing Business As) of a parent insurance company.
Parent Insurance Company	Parent Insurance Company District	The district where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Government ID Number	The government-issued identifier issued to the parent insurance company. For example, in the USA it is SSN or FEIN.
Parent Insurance Company	Parent Insurance Company ISO Code	The parent insurance company's Insurance Service Office (ISO) Code.
Parent Insurance Company	Parent Insurance Company Latitude	The latitude location of parent insurance company.
Parent Insurance Company	Parent Insurance Company Longitude	The longitude location of insurance company
Parent Insurance Company	Parent Insurance Company Name	The name of the parent insurance company.

Table 21: Homeowners (Continued)

Category	Filter	Description
Parent Insurance Company	Parent Insurance Company NAIC Code	The North America Industry Class System (NAICS) Code assigned to parent insurance company.
Parent Insurance Company	Parent Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Parent Insurance Company	Parent Insurance Company NAICS Code	The North America Industry Class System (NAICS) Code assigned to parent insurance company.
Parent Insurance Company	Parent Insurance Company Nature of Business	The type or category of the business activities done by the parent insurance company.
Parent Insurance Company	Parent Insurance Company Number of Employees	The count of people employed at the parent insurance company.
Parent Insurance Company	Parent Insurance Company Postal Code	The full postal zip code as defined by the parent insurance company specifications.
Parent Insurance Company	Parent Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Parent Insurance Company	Parent Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Parent Insurance Company	Parent Insurance Company Region	The geographical region where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the parent insurance company.
Parent Insurance Company	Parent Insurance Company State	The state where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Tax Location ID	The Tax Location Identifier for the parent insurance company's location.
Parent Insurance Company	Parent Insurance Company Territory	The territory where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Type	The classification of the parent insurance company's primary operations.
Who>Producer		
Producer	Producer Birth Date	The calendar date that details when is a producer's Date of Birth.
Producer	Producer Business Start Date	The calendar date when the producer began business operations.

Table 21: Homeowners (Continued)

Category	Filter	Description
Producer	Producer City	The city where the producer is located.
Producer	Producer Contact	The description of a producer's contact method.
Producer	Producer Contact Type	The contact method for a producer.
Producer	Producer County	The county where the producer is located.
Producer	Producer Country	The country where the producer is located.
Producer	Producer DBA	The operational name (Doing Business As) of a producer's Business
Producer	Producer District	The district where the producer is located.
Producer	Producer Effective Date	The calendar date the producer appointment begins.
Producer	Producer Gender	The gender (Male or Female) of the producer.
Producer	Producer Government Identification Number	The government-issued identifier issued to the producer. For example, in the USA it is SSN or FEIN.
Producer	Producer Latitude	The latitude location of the producer.
Producer	Producer Longitude	The longitude location of the producer.
Producer	Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the producer.
Producer	Producer Name	The full name of the producer.
Producer	Producer NAICS Code	North America Industry Class System (NAICS) Code issued to producer.
Producer	Producer Nature of Business	The type or category of the business activities done by the producer.
Producer	Producer Number of Employees	The count of people employed by producer.
Producer	Producer Postal Code	The full postal zip code as defined by company specifications.
Producer	Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Producer	Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Producer	Producer Present Employment Start Year	The year when the producer began working for their current employer.

Table 21: Homeowners (Continued)

Category	Filter	Description
Producer	Producer Region	The geographical region where producer is located.
Producer	Producer Relationship Code	The code that identifies the producer relationship.
Producer	Producer State	The state where producer is located.
Producer	Producer State License Number	The government-issued license number issued to the producer.
Producer	Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the producer.
Producer	Producer Tax Location ID	The Tax Location Identifier for the producer's location
Producer	Producer Territory	The territory where producer is located
Producer	Producer Type	This code represents the producer type.
Who>Reinsurance Company		
Reinsurance Company	Reinsurance Company Business Start Date	The calendar date when the reinsurance company began business operations.
Reinsurance Company	Reinsurance Company Contract	The description of the reinsurance company Contract.
Reinsurance Company	Reinsurance Company Contact Type	The contact method for reinsurance company.
Reinsurance Company	Reinsurance Company County	The county where reinsurance company is located.
Reinsurance Company	Reinsurance Company Country	The country where reinsurance company is located.
Reinsurance Company	Reinsurance Company City	The city where reinsurance company is located.
Reinsurance Company	Reinsurance Company DBA	The operational name (Doing Business As) of a reinsurance company.
Reinsurance Company	Reinsurance Company District	District where reinsurance company is located.
Reinsurance Company	Reinsurance Company Latitude	The latitude location of reinsurance company.

Table 21: Homeowners (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company Longitude	The longitude location of reinsurance company.
Reinsurance Company	Reinsurance Company NAICS Code	North America Industry Class System (NAICS) Code assigned to the reinsurance Company.
Reinsurance Company	Reinsurance Company Name	The name of the reinsurance company.
Reinsurance Company	Reinsurance Company Nature of Business	The type or category of the business activities done by the reinsurance company.
Reinsurance Company	Reinsurance Company Number	Identifier assigned to the reinsurance Company.
Reinsurance Company	Reinsurance Company Number of Employees	The count of people employed by the reinsurance Company.
Reinsurance Company	Reinsurance Company Postal Code	The full postal zip code as defined by company specifications.
Reinsurance Company	Reinsurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Reinsurance Company	Reinsurance Company Postal Code SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Reinsurance Company	Reinsurance Company Region	The geographical region of reinsurance company.
Reinsurance Company	Reinsurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company State	The state where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Tax Location Identifier	The Tax Location Identifier of the reinsurance company's location
Reinsurance Company	Reinsurance Company Territory	The territory where the reinsurance company is located
Reinsurance Company	Reinsurance Company Type Code	The code that identifies reinsurance company Type
Who>Sub Producer		
Sub Producer	Sub Producer Birth Date	The calendar date that details when is a sub producer's Date of Birth.

Table 21: Homeowners (Continued)

Category	Filter	Description
Sub Producer	Sub Producer Business Start Date	The calendar date when the sub producer began business operations.
Sub Producer	Sub Producer City	The city where the sub producer is located.
Sub Producer	Sub Producer Contact	The description of a sub producer's contact method.
Sub Producer	Sub Producer Contact Type	The contact method for a sub producer.
Sub Producer	Sub Producer County	The county where the sub producer is located.
Sub Producer	Sub Producer Country	The country where the sub producer is located.
Sub Producer	Sub Producer DBA	The operational name (Doing Business As) of a sub producer's Business
Sub Producer	Sub Producer District	District where the sub producer is located.
Sub Producer	Sub Producer Effective Date	The calendar date the sub producer appointment begins.
Sub Producer	Sub Producer Gender	The gender (Male or Female) of the sub producer.
Sub Producer	Sub Producer Government ID Number	The government-issued identifier issued to the sub producer. For example, in the USA it is SSN or FEIN.
Sub Producer	Sub Producer Latitude	The latitude location of sub producer.
Sub Producer	Sub Producer Longitude	The longitude location of sub producer.
Sub Producer	Sub Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the sub producer.
Sub Producer	Sub Producer Name	The full name of the sub producer.
Sub Producer	Sub Producer NAICS Code	North America Industry Class System (NAICS) Code issued to sub producer.
Sub Producer	Sub Producer Nature of Business	The type or category of the business activities done by the sub producer.
Sub Producer	Sub Producer Number of Employees	The count of people employed by sub producer.
Sub Producer	Sub Producer Postal Code	The full postal zip code as defined by company specifications.
Sub Producer	Sub Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.

Table 21: Homeowners (Continued)

Category	Filter	Description
Sub Producer	Sub Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Sub Producer	Sub Producer Present Employment Start Year	The year when the sub producer began working for their current employer.
Sub Producer	Sub Producer Region	The geographical region where the sub producer is located.
Sub Producer	Sub Producer State	The state where the sub producer is located.
Sub Producer	Sub Producer State_LIC_Number	The government-issued license number issued to the sub producer.
Sub Producer	Sub Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the sub producer.
Sub Producer	Sub Producer Tax Location ID	The Tax Location Identifier for the sub producer's location
Sub Producer	Sub Producer Territory	The territory where the sub producer is located
Sub Producer	Sub Producer Type	This code represents the sub producer type.
Who>Underwriter		
Underwriter	Underwriter Birth Date	The underwriter's birth date.
Underwriter	Underwriter City	The city where the underwriter lives.
Underwriter	Underwriter Contact	The description of the contact method for the underwriter.
Underwriter	Underwriter Contact Type	The contact method for the underwriter.
Underwriter	Underwriter County	The county of the underwriter's location.
Underwriter	Underwriter Country	The country of the underwriter's location.
Underwriter	Underwriter District	The district of the underwriter's location.
Underwriter	Underwriter Government ID Number	The government-issued identifier issued to the assistant underwriter. For example, in the USA it is SSN or FEIN.
Underwriter	Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Underwriter	Underwriter Latitude	The latitude location of the underwriter.
Underwriter	Underwriter Longitude	The longitude location of the underwriter.

Table 21: Homeowners (Continued)

Category	Filter	Description
Underwriter	Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the underwriter.
Underwriter	Underwriter Name	The name of the underwriter.
Underwriter	Underwriter Number	The number or other identifier that identifies the underwriter.
Underwriter	Underwriter Present Employment Start Year	The calendar year that the underwriter began employment at current employer.
Underwriter	Underwriter Postal Code	The full postal zip code as defined by company specifications.
Underwriter	Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Underwriter	Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Underwriter	Underwriter Region	The geographical region of the underwriter's location.
Underwriter	Underwriter State	The state of the underwriter's location.
Underwriter	Underwriter Tax Location ID	The Tax Location Identifier for the underwriter's location.
Underwriter	Underwriter Territory	The territory of the underwriter's location.
Underwriter	Underwriter Type	The classification of the underwriter's role.
What		
What	Annual Statement Line	A code that indicates in which line of the annual statement a transaction belongs.
What	Class	A class code is a three to six character field used to classify the general characteristics of an employees function. Used for rating.
What	Coverage	This field reports a code based on the type of coverage afforded on the insurance line policy. The aggregate of risks covered by the terms of a contract of insurance.
What	Currency Code	This system code identifies document currency.
What	Deductible	The amount of loss that the policyholder is responsible to pay.
Deductible	Deductible Type	This code represents the deductible type that pertains to a particular policy coverage.
What	Limit	The limit associated with the coverage code.

Table 21: Homeowners (Continued)

Category	Filter	Description
What	Monoline/Package	A code that tells if a policy is a monoline policy or is written as part of a package.
What	Policy Age	Number of months in policy term.
What	Primary Class Code	In a situation where the class code is split into more than one useful breakout, this is the primary portion.
What	Secondary Class Code	In a situation where the class code is split into more than one useful breakout, this is the secondary portion.
What>Basis		
Basis	Exposure Basis	The exposure basis is the denomination in which the exposure units are expressed.
Basis	Premium Basis	A code used to identify the type of rating scale used.
What>Billing Account		
Billing Account	Billing Account NUM	The number of the account in the billing system, if different than the policy system.
Billing Account	Method of Payment	The manner that the insured makes payments on billing account balance.
Billing Account	Payment Plan	The payment schedule applied to a policy balance.
Billing Account	Payment Service	The Payment Service Code identifies the type of billing plan used for the policy.
What>Class		
Class	Class Code	A class code is a three to six character field used to classify the general characteristics of an employees function. Used for rating.
Class	Class State	The state associated with the insured address.
Class	Primary Class Code	In a situation where the class code is split into more than one useful breakout, this is the primary portion.
Class	Secondary Class Code	In a situation where the class code is split into more than one useful breakout, this is the secondary portion.
What>Coverage		
Coverage	Annual Statement Line	A code that indicates in which line of the annual statement a transaction belongs.

Table 21: Homeowners (Continued)

Category	Filter	Description
Coverage	Bureau Report Plan	Indicates the statistical plan code used for bureau reporting.
Coverage	Coverage	This field reports a code based on the type of coverage afforded on the insurance line policy. The aggregate of risks covered by the terms of a contract of insurance.
Coverage	Coverage Category	A way to group coverages within a line of business.
Coverage	Coverage Effective Date	The calendar date when the policy coverage begins.
Coverage	Coverage Expiration Date	The calendar date when the policy coverage ends.
Coverage	Coverage Part	An indicator of a line of business within a package policy.
Coverage	Secondary Coverage	A client defined code to further breakdown the type of coverage afforded on the insurance line policy.
Coverage	Statistical Plan	This code identifies the Statistical Plan for coverage.
What>Deductible		
Deductible	Deductible	The amount of loss that the policyholder is responsible to pay.
Deductible	Deductible Applies To	This code is used to identify to what the deductible applies.
Deductible	Deductible Basis	This code represents the basis applied to determine the deductible.
Deductible	Deductible Type	This code represents the deductible type that pertains to a particular policy coverage.
What>Distribution Channel		
Distribution Channel	Distribution Channel Name	The full name of the distribution channel.
Distribution Channel	Distribution Channel Number	The number or other identifier assigned to the distribution channel.
Distribution Channel	Distribution Channel Type	The classification of the activities of a distribution channel.
Distribution Channel	Typical Commission Rate	The rate of commission given to a producer for a sale of a policy unless the commission rate is overridden.
What>Group Program		

Table 21: Homeowners (Continued)

Category	Filter	Description
Group Program	Group Program Anniversary Date	The calendar date that identifies the anniversary of a group program.
Group Program	Group Program Dividend Plan	The classification of the manner in which a group program dividend is paid.
Group Program	Group Program Dividend Date	The calendar date that identifies the dividend date of a group program.
Group Program	Group Program Member Count	This number identifies the group program.
Group Program	Group Program Name	The name of the program, other than state or national, that a group of policies are associated with.
Group Program	Group Program Natural Name	The name of the national program that a group of policies are associated with.
Group Program	Group Program Original Date	The calendar date that identifies group program origination date.
Group Program	Group Program Status	The description of the current condition of a program with which a group of policies is associated.
Group Program	Group Program State	The state associated with group program.
Group Program	Group Program Type	The type of program that is represented.
What>Homeowners Dwelling		
Homeowners Dwelling	Homeowners Aluminum Wiring Flag	This value represents based on the yes/no indicator identifying the presence or absence of aluminum wiring.
Homeowners Dwelling	Homeowners Area	This number represents the total area measurement of this dwelling.
Homeowners Dwelling	Homeowners Attached Garage Flag	This value represents based on the yes/no indicator identifying the presence or absence of a garage that is attached to the dwelling.
Homeowners Dwelling	Homeowners Basement Area	This number represents the total area measurement of all the basements in this dwelling.
Homeowners Dwelling	Homeowners Burglar Monitor Type	This system code describes presence or absence and attributes of burglar alarm in use at the dwelling.
Homeowners Dwelling	Homeowners Carport Flag	This value represents based on the yes/no indicator identifying the presence or absence of a carport.

Table 21: Homeowners (Continued)

Category	Filter	Description
Homeowners Dwelling	Homeowners Circuit Breakers Type	This value represents the yes/no indicator identifying the presence or absence of circuit breakers.
Homeowners Dwelling	Homeowners City Limits Code	This system code describes if a dwelling is located within or outside city limit boundary.
Homeowners Dwelling	Homeowners Condition	This system code indicates the dwelling condition.
Homeowners Dwelling	Homeowners Construction Type	This system code describes the type of construction materials primarily used for dwelling exterior.
Homeowners Dwelling	Homeowners Copper Wiring Flag	This value represents based on the yes/no indicator identifying the presence or absence of copper wiring.
Homeowners Dwelling	Homeowners Distance to Fire Hydrant	This number represents the distance units (feet/meters) from dwelling to nearest fire hydrant location.
Homeowners Dwelling	Homeowners Distance to Fire Station	This number represents the distance units (miles/kilometers) from dwelling to nearest fire station location.
Homeowners Dwelling	Homeowners Electricity Update Type	This system code indicates changes to electrical system after the dwelling's original construction.
Homeowners Dwelling	Homeowners Electricity Update Year	This value represents the calendar year of the last update to the dwelling electrical system.
Homeowners Dwelling	Homeowners Enclosed Garage Flag	This value represents based on the yes/no indicator identifying the presence or absence of enclosed garage.
Homeowners Dwelling	Homeowners External Paint Update Year	This value represents the calendar year of the last update to the dwelling exterior paint.
Homeowners Dwelling	Homeowners Extinguisher Flag	This value represents based on the yes/no indicator identifying the presence or absence of fire extinguisher.
Homeowners Dwelling	Homeowners Farming Flag	This value represents based on the yes/no indicator identifying the presence or absence of farming activities occurring on insured premises.
Homeowners Dwelling	Homeowners Fire Monitor Type	This system code indicates the type of fire monitoring alarm used at dwelling.
Homeowners Dwelling	Homeowners Fire Protection Class	This system code describes the fire protection services available at dwelling location.
Homeowners Dwelling	Homeowners Fire District	This system code describes the fire department response district assigned to a dwelling location.

Table 21: Homeowners (Continued)

Category	Filter	Description
Homeowners Dwelling	Homeowners Fuses Flag	This value represents based on the yes/no indicator identifying the presence or absence of fuses.
Homeowners Dwelling	Homeowners Foundation Type	This system code indicates the construction method used to construct dwelling foundation.
Homeowners Dwelling	Homeowners Gas Update Type	This system code indicates changes to gas system after the dwelling's original construction.
Homeowners Dwelling	Homeowners Gas Update Year	This value represents the calendar year of the last update to the dwelling gas system.
Homeowners Dwelling	Homeowners Heat Update Type	This system code indicates changes to heating system after the dwelling's original construction.
Homeowners Dwelling	Homeowners Heat Update Year	This value represents the calendar year of the last update to the dwelling heating system.
Homeowners Dwelling	Homeowners Hurricane Resistance Glass Flag	This value represents based on the yes/no indicator identifying the presence or absence of hurricane resistant glass.
Homeowners Dwelling	Homeowners Knob Tube Wiring Flag	This value represents based on the yes/no indicator identifying the presence or absence of knob and tube wiring.
Homeowners Dwelling	Homeowners Location City	The city where the dwelling is located.
Homeowners Dwelling	Homeowners Location County	The county where the dwelling is located.
Homeowners Dwelling	Homeowners Location District	The district where the location is located.
Homeowners Dwelling	Homeowners Location Latitude	The latitude location of the dwelling location.
Homeowners Dwelling	Homeowners Location Longitude	The longitude location of the dwelling location.
Homeowners Dwelling	Homeowners Location Number	This number identifies the dwelling location number.
Homeowners Dwelling	Homeowners Location Region	The geographical region where dwelling is located.
Homeowners Dwelling	Homeowners Location State	The state where the dwelling is located.
Homeowners Dwelling	Homeowners Location Type	This value represents the type of location of the dwelling.
Homeowners Dwelling	Homeowners Postal Code	The full postal zip code as defined by company specifications.

Table 21: Homeowners (Continued)

Category	Filter	Description
Homeowners Dwelling	Homeowners Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Homeowners Dwelling	Homeowners Postal Code Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Homeowners Dwelling	Homeowners Tax Location ID	The Tax Location Identifier of the dwelling location.
Homeowners Dwelling	Homeowners Market Value	The average price of similar dwellings recently sold in same real estate market.
Homeowners Dwelling	Homeowners Number of Chimneys	This number represents the total count of all chimneys in all units of a dwelling.
Homeowners Dwelling	Homeowners Number of Electricity System Amps	The number that represents the electrical current capacity of electrical system.
Homeowners Dwelling	Homeowners Number of Families	The total count of individual family units in single dwelling. For example, a duplex would have 2 families.
Homeowners Dwelling	Homeowners Number of Hearths	This number represents the count of individual fireplace hearths in all units of a dwelling.
Homeowners Dwelling	Homeowners Number of Pre-Fab Fireplaces	This number represents the count of pre-fabricated fireplaces contained in all units of the dwelling.
Homeowners Dwelling	Homeowners Number of Residents	This number represents the count of residents in all units of a dwelling.
Homeowners Dwelling	Homeowners Number of Rooms	This number represents the count of all rooms in the dwelling.
Homeowners Dwelling	Homeowners Number of Stories	The total count of Building Floor Levels contained in the dwelling.
Homeowners Dwelling	Homeowners Number of Wood Stove Inserts	This number represents the count of wood stove inserts contained in all units of the dwelling.
Homeowners Dwelling	Homeowners Occupancy Type	This system code indicates the type of occupants of the dwelling.
Homeowners Dwelling	Homeowners Plumbing Update Type	This system code indicates changes to plumbing system after the dwelling's original construction.
Homeowners Dwelling	Homeowners Plumbing Update Year	This value represents the calendar year of the last update to the dwelling's plumbing system.
Homeowners Dwelling	Homeowners Primary Heat Type	This system code describes the dwelling's primary source of heat.

Table 21: Homeowners (Continued)

Category	Filter	Description
Homeowners Dwelling	Homeowners Property Lot Size	This number represents the area measurement of the land width.
Homeowners Dwelling	Homeowners Purchase Date	This calendar date represents when the insured purchased the dwelling.
Homeowners Dwelling	Homeowners Purchase Price	This number represents the monetary amount paid when dwelling was purchased.
Homeowners Dwelling	Homeowners Replacement Cost	This number represents the amount it would cost to replace a dwelling at current prices with like materials.
Homeowners Dwelling	Homeowners Roof Impact Rating	This system code describes the level of hail impact a roof material can withstand.
Homeowners Dwelling	Homeowners Roof Material	This system code identifies the material used to construct the roof.
Homeowners Dwelling	Homeowners Roof Update Type	This system code indicates the type or roofing updates made since the dwelling's original construction.
Homeowners Dwelling	Homeowners Roof Update Year	This value represents the calendar year of the last update to the dwelling's roofing materials.
Homeowners Dwelling	Homeowners Secondary Heat Type	This system code describes the dwelling's secondary source of heat.
Homeowners Dwelling	Homeowners Siding	This system code identifies the type of material used as siding on the dwelling.
Homeowners Dwelling	Homeowners Siding Percent	This number represents the percentage of total dwelling exterior covered with siding.
Homeowners Dwelling	Homeowners Sprinkler Type	This system code identifies the sprinkler system type.
Homeowners Dwelling	Homeowners Storm Shutters	This system code describes the existence or absence and type of storm shutters.
Homeowners Dwelling	Homeowners Swimming Pool	This system code indicates the presence or absence and type of swimming pool.
Homeowners Dwelling	Homeowners Trampoline Flag	This value represents based on the yes/no indicator identifying the presence or absence of a trampoline.
Homeowners Dwelling	Homeowners Type	A code designating the type of dwelling.
Homeowners Dwelling	Homeowners Under Construction Type	This system code indicates active construction activities on the dwelling.
Homeowners Dwelling	Homeowners Wiring Last Inspection	This calendar date represents the occurrence of the last inspection of the wiring system.

Table 21: Homeowners (Continued)

Category	Filter	Description
Homeowners Dwelling	Homeowners Wiring Update Type	This system code identifies the type of update to wiring system.
Homeowners Dwelling	Homeowners Wiring Update Year	This value represents the calendar year of the last update to the dwelling wiring system.
Homeowners Dwelling	Homeowners Year Built	This value represents the calendar year that the dwelling was constructed.
What>Reinsurance Contract		
Reinsurance Contract	Reinsurance Contract Begin Date	The calendar date that identifies when reinsurance contract begins.
Reinsurance Contract	Reinsurance Contract Ceded Loss Ratio	The ratio of losses and loss adjustment expenses incurred to premiums earned for the portion of exposure that is transferred to a reinsurance company.
Reinsurance Contract	Reinsurance Contract Category	The category of the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Cession Number	The unique identifier of the reinsurance contract cession.
Reinsurance Contract	Reinsurance Contract Certificate Number	The unique identifier assigned to the reinsurance contract certificate.
Reinsurance Contract	Reinsurance Contract End Date	The calendar date reinsurance contract ends.
Reinsurance Contract	Reinsurance Contract Facultative Commission Percent	The percentage commission paid to reinsurer.
Reinsurance Contract	Reinsurance Contract Layer	The reinsurance contract layer describes the amount of reinsurance provided in the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Type	The contract type for reinsurance contract dimension.
Reinsurance Contract	Reinsurance Contract Treaty Number	A unique identifier assigned to a reinsurance contract treaty.
When		
When	Calendar Month	The numeric representation of the month (1-12).
When	Calendar Month Name	The name of a month (Jan, Feb, etc.).
When	Calendar Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Calendar Quarter Name	The name of a quarter (Q1 - Q4).

Table 21: Homeowners (Continued)

Category	Filter	Description
When	Calendar Year	The one-year period that begins on January 1 and ends on December 31.
When	Fiscal Month	The numeric representation of the month (1-12).
When	Fiscal Month Name	The name of a month (Jan, Feb, etc.).
When	Fiscal Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Fiscal Quarter Name	The name of a quarter (Q1 - Q4).
When	Fiscal Year	The year commencing with the effective date of the insurance policy or with an anniversary of that date.
Where		
Where	Insured City	The name of the city in the address.
Where	Insured Country	The country code in the address.
Where	Insured County	The county in the address.
Where	Insured District	The geographical district where the insured is located.
Where	Insured Latitude	The latitude location of the insured's address.
Where	Insured Longitude	The longitude location of the insured's address.
Where	Insured Postal Code	The full postal zip code as defined by company specifications.
Where	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Insured Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Where	Insured Region	The geographical region where insured is located.
Where	Insured State	The state of the insured's location.
Where	Insured Territory	The territory of the insured's location.
Where	Location of Loss City	The city where the loss occurred.
Where	Location of Loss Country	The country where the loss occurred.
Where	Location of Loss County	The county where the loss occurred.
Where	Location of Loss District	The district where the loss occurred.
Where	Location of Loss Latitude	The latitude location where the loss occurred.

Table 21: Homeowners (Continued)

Category	Filter	Description
Where	Location of Loss Longitude	The longitude location where the loss occurred.
Where	Location of Loss Postal Code	The full postal zip code as defined by company specifications.
Where	Location of Loss Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Location of Loss Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code. This is the sub code of the location where the loss occurred.
Where	Location of Loss Region	The geographical region where a loss occurred.
Where	Location of Loss State	The state where a loss occurred.
Where	Location of Loss Tax Location ID	The Tax Location Identifier of the location where a loss occurred.
Where	Location of Loss Territory	The territory where a loss occurred.
Additional Filters>Claim Detail		
Claim Detail	Case Made Retroactive Date	The calendar date that the claim case was made retroactive.
Claim Detail	Case Management Assigned Date	The calendar date that claim management is assigned to claim.
Claim Detail	Claim Closed Date	The date on which the insurance company closed the claim.
Claim Detail	Claim Loss Date	The calendar date on which an accident or loss occurred regardless of when the claim was filed.
Claim Detail	Claim Number	A unique number assigned to each claim.
Claim Detail	Claim Opened Date	The date a claim was opened.
Claim Detail	Claim Reclosed Date	The date a claim was closed after being reopened.
Claim Detail	Claim Reopened Date	The date on which a closed claim was changed to open status.
Claim Detail	Claim Report Class Code	The code describes the class code report class applicable to the claim, regardless of the class codes on the policy.
Claim Detail	Claim Report Date	This calendar date represents when the claim was reported to the insurance carrier.
Claim Detail	Claim Reported By	The source of claim report.

Table 21: Homeowners (Continued)

Category	Filter	Description
Claim Detail	Claim Reported Date	The date the insured filed the claim with the insurance carrier.
Claim Detail	Claim Status	The process condition of a claim.
Claim Detail	Claims Made Basis Code	The code identifies whether or not the claims made basis is being used for reporting of claims.
Claim Detail	First Claim Contact Date	The calendar date that the claimant was first contacted by the insuring company or its representative.
Claim Detail	First Claim Payment Date	The calendar date when the first payment was made on a claim.
Claim Detail	Fraud Claim Code	The code to indicate potential fraudulent claim based on adjusters' investigation.
Claim Detail	Last Claim Payment Date	The calendar date when the last claim payment was issued.
Claim Detail	Last Salvage Payment Date	The calendar date when the last payment was made associated with salvage.
Claim Detail	Last Subrogation Payment Date	The calendar date when Last Subrogation Payment was received.
Claim Detail	Loss Month	The month that the claim loss period began.
Claim Detail	Loss Quarter	The quarter that the claim loss period began.
Claim Detail	Loss Time	The number that identifies the time a loss occurred.
Claim Detail	Loss Year	The year that the claim loss period began.
Claim Detail	Number of Rental Days	The total count of days a replacement item is rented.
Claim Detail	Number of Repair Days	The total count of days required to repair an item.
Claim Detail	Number of Storage Days	The total count of days an item is stored.
Additional Filters>Policy Detail		
Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.
Policy Detail	Cancel Reason	The system code describes the reason for a cancellation.
Policy Detail	Exposure Basis	The denomination in which the exposure units are expressed.

Table 21: Homeowners (Continued)

Category	Filter	Description
Policy Detail	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
Policy Detail	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
Policy Detail	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
Policy Detail	Package Discount Percent	The percentage of premium waived when Package Discount applies.
Policy Detail	Package Modification Assignment Code	This code indicates the package modification assignment.
Policy Detail	Package Modification Factor	The percentage of premium waived as a result of packaging coverages.
Policy Detail	Policy Age	The number of months in policy term.
Policy Detail	Policy Cancel Date	The date a policy or coverage was terminated by cancellation.
Policy Detail	Policy Effective Date	The effective date of the policy related to this transaction.
Policy Detail	Policy Expiration Date	The expiration date of the policy related to this transaction.
Policy Detail	Policy Number	A unique client-assigned number identifying each policy.
Policy Detail	Policy Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
Policy Detail	Policy Type	The description of the type of coverage included in a policy.
Policy Detail	Policy Type Category	The categorization of the type of coverage a policy includes.
Policy Detail	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
Policy Detail	Premium Basis	The basis to which rates are applied to determine premiums.
Policy Detail	Renewal Term	The length of the renewal policy period (term) in months.
Policy Detail	Supporting Business Discount Percent	The percentage of premium waived when supporting business discount applies.

Table 21: Homeowners (Continued)

Category	Filter	Description
Policy Detail	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.
Additional Filters>Cancelled/Effective/Expired/Inforce/Retained/Written Policy Detail		
Cancelled Policy Detail, Effective Policy Detail, Expired Policy Detail, Inforce Policy Detail, Retained Policy Detail, Written Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.
	Cancel Reason	The system code describes the reason for a cancellation.
	Exposure Basis	The denomination in which the exposure units are expressed.
	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
	Package Discount Percent	The percentage of premium waived when Package Discount applies.
	Package Modification Assignment Code	This code indicates the package modification assignment.
	Package Modification Factor	The percentage of premium waived as a result of packaging coverages.
	Policy Cancellation Date	The date a policy or coverage was terminated by cancellation.
	Policy Effective Date	The effective date of the policy related to this transaction.
	Policy Expiration Date	The expiration date of the policy related to this transaction.
	Policy Number	A unique client-assigned number identifying each policy.
Policy Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.	

Table 21: Homeowners (Continued)

Category	Filter	Description
	Policy Type	The description of the type of coverage included in a policy.
	Policy Type Category	The categorization of the type of coverage a policy includes.
	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
	Premium Basis	The basis to which rates are applied to determine premiums.
	Renewal Term	The length of the renewal policy period (term) in months.
	Supporting Business Discount Percent	The percentage of premium waived when supporting business discount applies.
	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.

PERSONAL AUTO

Table 22: Personal Auto

Category	Filter	Description
Who	Assistant Underwriter	The name of the assistant underwriter.
Who	Assistant Underwriter Number	A unique number assigned to an assistant underwriter.
Who	Company Name	The name of the company associated with the policy.
Who	Company Type	A code used to represent the type of company.
Who	Distribution Channel Name	The name used to represent the distribution channel.
Who	Distribution Channel Type	A code used to represent the type of distribution channel.
Who	Group Program	The code used to represent the program that a group of policies are associated with.
Who	Group Program Type	The type of program that is represented.
Who	Producer Name	The name of the producer.
Who	Producer Number	The number used to represent the producer.
Who	Producer Type	The code used to represent the producer type.
Who	Sub Producer Name	The name of an individual producer within an insurance agency.
Who	Sub Producer Number	The number used to represent the sub producer.
Who	Sub Producer Type	The code used to represent the sub producer type.
Who	Underwriter Name	The name of the underwriter.
Who	Underwriter Number	A unique number assigned to an underwriter.
Who>Assistant Underwriter		
Assistant Underwriter	Assistant Underwriter Birth Date	The assistant underwriter's birth date.
Assistant Underwriter	Assistant Underwriter City	The city where the assistant underwriter lives.
Assistant Underwriter	Assistant Underwriter Contact	The description of the contact method for the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Contact Type	The contact method for the assistant underwriter.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter Country	The country of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter County	The county of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter District	The district of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Government ID Number	The government-issued identifier issued to the assistant underwriter. For example, in the USA it is SSN or FEIN.
Assistant Underwriter	Assistant Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Latitude	The latitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Longitude	The longitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Name	The name of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Number	The number or other identifier that identifies the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Present Employment Start Year	The calendar year that the assistant underwriter began employment at current employer.
Assistant Underwriter	Assistant Underwriter Postal Code	The full postal zip code as defined by company specifications.
Assistant Underwriter	Assistant Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Assistant Underwriter	Assistant Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Assistant Underwriter	Assistant Underwriter Region	The geographical region of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter State	The state of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Territory	The territory of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Tax Location ID	The Tax Location Identifier for the assistant underwriter's location.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter Type	The classification of the assistant underwriter's role.
Who>Insurance Company		
Insurance Company	Insurance Company AM Best Number	The number or other identifier that identifies the insurance company AM Best Rating.
Insurance Company	Insurance Company Business Start Date	The calendar date when the insurance company began business operations.
Insurance Company	Insurance Company Contact	The description of the insurance company contact type.
Insurance Company	Insurance Company Contact Type	The contact method for the insurance company.
Insurance Company	Insurance Company Country	The country where the insurance company is located.
Insurance Company	Insurance Company County	The county where insurance company is located.
Insurance Company	Insurance Company City	The city where the insurance company is located.
Insurance Company	Insurance Company DBA	The operational name (Doing Business As) of an insurance company.
Insurance Company	Insurance Company District	The district where the insurance company is located.
Insurance Company	Insurance Company Government ID Number	The government-issued identifier issued to the insurance company. For example, in the USA it is SSN or FEIN.
Insurance Company	Insurance Company ISO Code	The insurance company's Insurance Service Office (ISO) Code.
Insurance Company	Insurance Company Latitude	The latitude location of insurance company.
Insurance Company	Insurance Company Longitude	The longitude location of insurance company
Insurance Company	Insurance Company Name	The name of the insurance company.
Insurance Company	Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Insurance Company	Insurance Company NAICS Code	The North America Industry Class System (NAICS) Code assigned to insurance company.
Insurance Company	Insurance Company Nature of Business	The type or category of the business activities done by the insurance company.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Insurance Company	Insurance Company Number of Employees	The count of people employed at the insurance company.
Insurance Company	Insurance Company Postal Code	The full postal zip code as defined by the insurance company specifications.
Insurance Company	Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Insurance Company	Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Insurance Company	Insurance Company Region	The geographical region where the insurance company is located.
Insurance Company	Insurance Company State	The state where the insurance company is located.
Insurance Company	Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insurance company.
Insurance Company	Insurance Company Type	The classification of the insurance company's primary operations.
Insurance Company	Insurance Company Territory	The territory where the insurance company is located.
Insurance Company	Insurance Company Tax Location ID	The Tax Location Identifier for the insurance company's location.
Who>Insured		
Insured	Insured Audit Frequency	The indicator of when an insured audit is scheduled.
Insured	Insured Audit Type	The classification of the audit activities conducted on insured.
Insured	Insured Birth Date	The calendar date when insured was born.
Insured	Insured Business Start Date Identifier	The calendar date when the insured business operations began.
Insured	Insured City	The name of the city in the address
Insured	Insured Contact	The description of the insured's contact type.
Insured	Insured Contact Type	The contact method for the insured.
Insured	Insured County	The county in the address.
Insured	Insured Country	The country code in the address.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Insured	Insured Credit Score	The code or number that represents the insured credit rating score.
Insured	Insured DBA	The operational name (Doing Business As) of an insured's business.
Insured	Insured Gender	The gender (Male or Female) of the insured.
Insured	Insured Government Identification Number	The government-issued identifier issued to the insured. For example, in the USA it is SSN or FEIN.
Insured	Insured Latitude	The latitude location of the insured's address.
Insured	Insured Longitude	The longitude location of the insured location.
Insured	Insured Marital Status	The present marital condition (single, married, divorced, widowed) of the insured.
Insured	Insured Name	The full name of the insured.
Insured	Insured NAICS Code	The North America Industry Class System (NAICS) Code assigned to insured.
Insured	Insured Nature of Business	The type or category of the business activities done by the insured.
Insured	Insured Number of Employees	The count of people employed by insured.
Insured	Insured Postal Code	The full postal zip code as defined by company specifications.
Insured	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code
Insured	Insured Postal SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Insured	Insured Present Employment Start Year	The calendar year that the insured began working for their current employer.
Insured	Insured Prior Insurance Company	Name of insurance company that last provided insurance prior to policy inception.
Insured	Insured Region	The geographical region where insured is located.
Insured	Insured Report Period	The description of the timeframe of activities considered in an insured report

Table 22: Personal Auto (Continued)

Category	Filter	Description
Insured	Insured Risk Grade	This code represents the AM Best or company defined risk grade for insured.
Insured	Insured SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insured.
Insured	Insured State	The state of the insured's location.
Insured	Insured Tax Location Identifier	The Tax Location Identifier for the insured's location.
Insured	Insured Territory	The territory of the insured's location.
Insured	Insured Type	The type of entity that contracted with insurance company to obtain a policy.
Who>Parent Insurance Company		
Parent Insurance Company	Parent Insurance Company AM Best Number	The number or other identifier that identifies the parent insurance company AM Best Rating.
Parent Insurance Company	Parent Insurance Company Business Start Date	The calendar date when the parent insurance company began business operations.
Parent Insurance Company	Parent Insurance Company City	The city where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Contact	The description of the parent insurance company contact type.
Parent Insurance Company	Parent Insurance Company Contact Type	The contact method for the parent insurance company.
Parent Insurance Company	Parent Insurance Company County	The county where parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Country	The country where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company DBA	The operational name (Doing Business As) of an parent insurance company.
Parent Insurance Company	Parent Insurance Company District	The district where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Government ID Number	The government-issued identifier issued to the parent insurance company. For example, in the USA it is SSN or FEIN.
Parent Insurance Company	Parent Insurance Company ISO Code	The parent insurance company's Insurance Service Office (ISO) Code.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Parent Insurance Company	Parent Insurance Company Latitude	The latitude location of parent insurance company.
Parent Insurance Company	Parent Insurance Company Longitude	The longitude location of insurance company
Parent Insurance Company	Parent Insurance Company Name	The name of the parent insurance company.
Parent Insurance Company	Parent Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Parent Insurance Company	Parent Insurance Company NAICS Code	The North America Industry Class System (NAICS) code assigned to parent insurance company.
Parent Insurance Company	Parent Insurance Company Nature of Business	The type or category of the business activities done by the parent insurance company.
Parent Insurance Company	Parent Insurance Company Number of Employees	The count of people employed at the parent insurance company.
Parent Insurance Company	Parent Insurance Company Postal Code	The full postal zip code as defined by the parent insurance company specifications.
Parent Insurance Company	Parent Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Parent Insurance Company	Parent Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Parent Insurance Company	Parent Insurance Company Region	The geographical region where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the parent insurance company.
Parent Insurance Company	Parent Insurance Company State	The state where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Tax Location ID	The Tax Location Identifier for the parent insurance company's location.
Parent Insurance Company	Parent Insurance Company Territory	The territory where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Type	The classification of the parent insurance company's primary operations.
Who>Producer		

Table 22: Personal Auto (Continued)

Category	Filter	Description
Producer	Producer Birth Date	The calendar date that details when is a producer's date of birth.
Producer	Producer Business Start Date	The calendar date when the producer began business operations.
Producer	Producer City	The city where the producer is located.
Producer	Producer Contact	The description of a producer's contact method.
Producer	Producer Contact Type	The contact method for a producer.
Producer	Producer County	The county where the producer is located.
Producer	Producer Country	The country where the producer is located.
Producer	Producer DBA	The operational name (Doing Business As) of a producer's Business
Producer	Producer District	The district where the producer is located.
Producer	Producer Effective Date	The calendar date the producer appointment begins.
Producer	Producer Gender	The gender (Male or Female) of the producer.
Producer	Producer Government Identification Number	The government-issued identifier issued to the producer. For example, in the USA it is SSN or FEIN.
Producer	Producer Latitude	The latitude location of the producer.
Producer	Producer Longitude	The longitude location of the producer.
Producer	Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the producer.
Producer	Producer Name	The full name of the producer.
Producer	Producer NAICS Code	North America Industry Class System (NAICS) Code issued to producer.
Producer	Producer Nature of Business	The type or category of the business activities done by the producer.
Producer	Producer Number of Employees	The count of people employed by producer.
Producer	Producer Postal Code	The full postal zip code as defined by company specifications.
Producer	Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Producer	Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Producer	Producer Present Employment Start Year	The year when the producer began working for their current employer.
Producer	Producer Region	The geographical region where producer is located.
Producer	Producer Relationship Code	The code that identifies the producer Relationship.
Producer	Producer State	The state where producer is located.
Producer	Producer State License Number	The government-issued license number issued to the producer.
Producer	Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the producer.
Producer	Producer Tax Location ID	The Tax Location Identifier for the producer's location
Producer	Producer Territory	The territory where producer is located
Producer	Producer Type	This code represents the producer type.
Who>Reinsurance Company		
Reinsurance Company	Reinsurance Company Business Start Date	The calendar date when the reinsurance company began business operations.
Reinsurance Company	Reinsurance Company Contract	The description of the reinsurance company contract.
Reinsurance Company	Reinsurance Company Contact Type	The contact method for reinsurance company.
Reinsurance Company	Reinsurance Company County	The county where reinsurance company is located.
Reinsurance Company	Reinsurance Company Country	The country where reinsurance company is located.
Reinsurance Company	Reinsurance Company City	The city where reinsurance company is located.
Reinsurance Company	Reinsurance Company DBA	The operational name (Doing Business As) of a reinsurance company.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company District	District where reinsurance company is located.
Reinsurance Company	Reinsurance Company Latitude	The latitude location of reinsurance company.
Reinsurance Company	Reinsurance Company Longitude	The longitude location of reinsurance company.
Reinsurance Company	Reinsurance Company NAICS Code	North America Industry Class System (NAICS) Code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company Name	The name of the reinsurance company.
Reinsurance Company	Reinsurance Company Nature of Business	The type or category of the business activities done by the reinsurance company.
Reinsurance Company	Reinsurance Company Number	Identifier assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company Number of Employees	The count of people employed by the reinsurance company.
Reinsurance Company	Reinsurance Company Postal Code	The full postal zip code as defined by company specifications.
Reinsurance Company	Reinsurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Reinsurance Company	Reinsurance Company Postal Code SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Reinsurance Company	Reinsurance Company Region	The geographical region of reinsurance company.
Reinsurance Company	Reinsurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company State	The state where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Tax Location Identifier	The Tax Location Identifier of the reinsurance company's location.
Reinsurance Company	Reinsurance Company Territory	The territory where the reinsurance company is located.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company Type Code	The code that identifies reinsurance company type.
Who>Sub Producer		
Sub Producer	Sub Producer Birth Date	The calendar date that details when is a sub producer's Date of Birth.
Sub Producer	Sub Producer Business Start Date	The calendar date when the sub producer began business operations.
Sub Producer	Sub Producer City	The city where the sub producer is located.
Sub Producer	Sub Producer Contact	The description of a sub producer's contact method.
Sub Producer	Sub Producer Contact Type	The contact method for a sub producer.
Sub Producer	Sub Producer County	The county where the sub producer is located.
Sub Producer	Sub Producer Country	The country where the sub producer is located.
Sub Producer	Sub Producer DBA	The operational name (Doing Business As) of a sub producer's business.
Sub Producer	Sub Producer District	The district where the sub producer is located.
Sub Producer	Sub Producer Effective Date	The calendar date the sub producer appointment begins.
Sub Producer	Sub Producer Gender	The gender (Male or Female) of the sub producer.
Sub Producer	Sub Producer Government ID Number	The government-issued identifier issued to the sub producer. For example, in the USA it is SSN or FEIN.
Sub Producer	Sub Producer Latitude	The latitude location of sub producer.
Sub Producer	Sub Producer Longitude	The longitude location of sub producer.
Sub Producer	Sub Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the sub producer.
Sub Producer	Sub Producer Name	The full name of the sub producer.
Sub Producer	Sub Producer NAICS Code	The North America Industry Class System (NAICS) Code issued to sub producer.
Sub Producer	Sub Producer Nature of Business	The type or category of the business activities done by the sub producer.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Sub Producer	Sub Producer Number of Employees	The count of people employed by sub producer.
Sub Producer	Sub Producer Postal Code	The full postal zip code as defined by company specifications.
Sub Producer	Sub Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Sub Producer	Sub Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Sub Producer	Sub Producer Present Employment Start Year	Year when sub producer began working for their current employer.
Sub Producer	Sub Producer Region	The geographical region where the sub producer is located.
Sub Producer	Sub Producer State	The state where the sub producer is located.
Sub Producer	Sub Producer State_LIC_Number	The government-issued license number issued to the sub producer.
Sub Producer	Sub Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the sub producer.
Sub Producer	Sub Producer Tax Location ID	The Tax Location Identifier for the sub producer's location
Sub Producer	Sub Producer Territory	The territory where the sub producer is located
Sub Producer	Sub Producer Type	This code represents the sub producer type Standard Code
Who>Underwriter		
Underwriter	Underwriter Birth Date	The underwriter's birth date.
Underwriter	Underwriter City	The city where the underwriter lives.
Underwriter	Underwriter Contact	The description of the contact method for the underwriter.
Underwriter	Underwriter Contact Type	The contact method for the underwriter.
Underwriter	Underwriter County	The county of the underwriter's location.
Underwriter	Underwriter Country	The country of the underwriter's location.
Underwriter	Underwriter District	The district of the underwriter's location.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Underwriter	Underwriter Government ID Number	The government-issued identifier issued to the underwriter. For example, in the USA it is SSN or FEIN.
Underwriter	Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Underwriter	Underwriter Latitude	The latitude location of the underwriter.
Underwriter	Underwriter Longitude	The longitude location of the underwriter.
Underwriter	Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the underwriter.
Underwriter	Underwriter Name	The name of the underwriter.
Underwriter	Underwriter Number	The number or other identifier that identifies the underwriter.
Underwriter	Underwriter Present Employment Start Year	The calendar year that the underwriter began employment at current employer.
Underwriter	Underwriter Postal Code	The full postal zip code as defined by company specifications.
Underwriter	Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Underwriter	Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Underwriter	Underwriter Region	The geographical region of the underwriter's location.
Underwriter	Underwriter State	The state of the underwriter's location.
Underwriter	Underwriter Tax Location ID	The Tax Location Identifier for the underwriter's location.
Underwriter	Underwriter Territory	The territory of the underwriter's location.
Underwriter	Underwriter Type	The classification of the underwriter's role.
What		
What	Annual Statement Line	A code that indicates in which line of the annual statement a transaction belongs.
What	Coverage	This field reports a code based on the type of coverage afforded on the insurance line policy. The aggregate of risks covered by the terms of a contract of insurance.
What	Currency Code	This system code identifies document currency.

Table 22: Personal Auto (Continued)

Category	Filter	Description
What	Deductible	The amount of loss that the policyholder is responsible to pay.
What	Full Limit	The limit associated with the coverage code.
What	Monoline/Package	A code that tells if a policy is a monoline policy or is written as part of a package.
What	Policy Age	Number of months in policy term.
What>Billing Account		
Billing Account	Billing Account Number	The number of the account in the billing system, if different than the policy system.
Billing Account	Method of Payment	The manner that the insured makes payments on billing account balance.
Billing Account	Payment Plan	The payment schedule applied to a policy balance.
Billing Account	Payment Service	The Payment Service code identifies the type of billing plan used for the policy.
What>Class		
Class	Class Code	A class code is a three to six character field used to classify the general characteristics of an employees function. Used for rating.
Class	Class State	The state associated with the insured address.
Class	Primary Class Code	In a situation where the class code is split into more than one useful breakout, this is the primary portion.
Class	Secondary Class Code	In a situation where the class code is split into more than one useful breakout, this is the secondary portion.
What>Coverage		
Coverage	Annual Statement Line	A code that indicates in which line of the annual statement a transaction belongs.
Coverage	Bureau Report Plan	Indicates the statistical plan code used for bureau reporting.
Coverage	Coverage	This field reports a code based on the type of coverage afforded on the insurance line policy. The aggregate of risks covered by the terms of a contract of insurance.
Coverage	Coverage Category	A way to group coverages within a line of business.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Coverage	Coverage Effective Date	The calendar date when the policy coverage begins.
Coverage	Coverage Expiration Date	The calendar date when the policy coverage ends.
Coverage	Coverage Part	An indicator of a line of business within a package policy.
Coverage	Secondary Coverage	A client defined code to further breakdown the type of coverage afforded on the insurance line policy.
Coverage	Statistical Plan	This code identifies the statistical plan for coverage.
What>Deductible		
Deductible	Deductible	The amount of loss that the policyholder is responsible to pay.
Deductible	Deductible Applies To	This code is used to identify to what the deductible applies.
Deductible	Deductible Basis	This code represents the basis applied to determine the deductible.
Deductible	Deductible Type	This code represents the deductible type that pertains to a particular policy coverage.
What>Distribution Channel		
Distribution Channel	Distribution Channel Name	The full name of the distribution channel.
Distribution Channel	Distribution Channel Number	The number or other identifier assigned to the distribution channel.
Distribution Channel	Distribution Channel Type	The classification of the activities of distribution channel.
Distribution Channel	Typical Commission Rate	The rate of commission given to a producer for a sale of a policy unless the commission rate is overridden.
What>Group Program		
Group Program	Group Program Anniversary Date	The calendar date that identifies the anniversary of a group program.
Group Program	Group Program Dividend Plan	The classification of the manner in which a group program dividend is paid.
Group Program	Group Program Dividend Date	The calendar date that identifies the dividend date of a group program.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Group Program	Group Program Member Count	This number identifies the group program.
Group Program	Group Program Name	The name of the program, other than state or national, that a group of policies are associated with.
Group Program	Group Program Natural Name	The name of the national program that a group of policies are associated with.
Group Program	Group Program Original Date	The calendar date that identifies group program Origination Date.
Group Program	Group Program Status	The description of the current condition of a program with which a group of policies is associated.
Group Program	Group Program State	The state associated with group program.
Group Program	Group Program Type	The type of program that is represented.
What>Personal Auto Vehicle		
Personal Auto Vehicle	Airbag Type	This system code identifies the attributes of the airbag system installed in the personal vehicle.
Personal Auto Vehicle	Anti Theft Device Code	This system code identifies the attributes of the anti-theft system installed on the personal vehicle.
Personal Auto Vehicle	Body Type	This system code describes the attributes of the vehicle body for a scheduled personal vehicle.
Personal Auto Vehicle	Cell Phone Type	This system code identifies the attributes of a cellular phone present in the vehicle.
Personal Auto Vehicle	Effective Date	The effective date of this policy related to this transaction.
Personal Auto Vehicle	Estimate Annual Mileage	This number represents the estimated number of distance units (miles/kilometers) a vehicle is driven over a one year period.
Personal Auto Vehicle	Horsepower Displacement	This value represents the cubic centimeters or displacement (for example, motorcycles) or horsepower for recreational vehicles.
Personal Auto Vehicle	Make	This value represents the make of the vehicle.
Personal Auto Vehicle	Model	This value represents the model name assigned by manufacturer of personal vehicle.
Personal Auto Vehicle	Multi Car Discount Percentage	This number represents the percentage of premium waived when a multiple car discount applies.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Personal Auto Vehicle	Number of Days Driver Per Work	This number represents the count of days the personal vehicle is driven each calendar week.
Personal Auto Vehicle	Number of One Way Miles To Work	This number represents the number of distance units (miles/kilometers) to place of employment.
Personal Auto Vehicle	Ownership Type	This system code describes the ownership type of a vehicle standard code.
Personal Auto Vehicle	Performance Code	This system code identifies the performance level of the vehicle.
Personal Auto Vehicle	Rating Age	This system code represents the rating age used to rate the vehicle, regardless of its actual age.
Personal Auto Vehicle	Symbol	This system code is a cost symbol that represents a value.
Personal Auto Vehicle	Use Code	This system code identifies the primary use of the vehicle.
Personal Auto Vehicle	Year	This value represents the model year assigned by vehicle manufacturer.
What>Personal Auto Driver		
Personal Auto Driver	Accident Count	This number represents the count of reported accidents charged against the driver's driving record.
Personal Auto Driver	Birth Date	This date identifies the personal vehicle driver's date of birth.
Personal Auto Driver	Class	This value represents the classification that describes the characteristics of a the driver It is typically only used for assigned risk, JUA, and in Texas.
Personal Auto Driver	Commuter Discount Flag	This value represents based on the yes/no indicator identifying whether or not a commuter discount applies.
Personal Auto Driver	Commuter Discount Percentage	This number represents the percentage of premium waived when commuter discount applies.
Personal Auto Driver	Dfen Drv Code	This value describes the defensive driving code.
Personal Auto Driver	Dfen Drv Training Discount Flag	This value represents based on the yes/no indicator identifying whether or not a defensive driver training discount applies.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Personal Auto Driver	Dfen Drv Training Discount Percentage	This number represents the percentage of premium waived when Defensive driver discount applies.
Personal Auto Driver	Dfen Drv Violation Count	This number represents the count of intermediate violations charged against the driver's driving record.
Personal Auto Driver	Dwi Dui Violation Count	This number represents the count of Driving While Intoxicated (DWI) and/or Driving Under the Influence (DUI) violations charged against the driver's driving record.
Personal Auto Driver	Effective Date	The effective date of the policy related to this transaction.
Personal Auto Driver	Gender	This value represents the gender (male or female) of the driver.
Personal Auto Driver	Good Student Code	This system code identifies the good student type.
Personal Auto Driver	Good Student Discount Flag	This value represents based on the yes/no indicator identifying whether or not a good student discount applies.
Personal Auto Driver	Good Student Discount Percentage	This number represents the percentage of premium waived when good student discount applies.
Personal Auto Driver	License Date	This calendar date represents when personal vehicle driver was granted a drivers license.
Personal Auto Driver	Marital Status	This value represents the third limit of limit dimension table.
Personal Auto Driver	Major Violation Count	This number represents the count of major violations charged against the driver's driving record.
Personal Auto Driver	Minor Violation Count	This number represents the count of minor violations charged against the driver's driving record.
Personal Auto Driver	Name	This value represents the full given name of personal vehicle driver.
Personal Auto Driver	Number	This number identifies personal vehicle driver.
Personal Auto Driver	Present Employment Start Year	This value represents the calendar year that the personal vehicle driver began working for their current employer.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Personal Auto Driver	Training Discount Flag	This value represents based on the yes/no indicator identifying whether or not a driver training discount applies.
Personal Auto Driver	Training Discount Percentage	This number represents the percentage of premium waived when driving training discount applies.
Personal Auto Driver	Type	This value represents the indicator that describes the characteristics of a personal vehicle driver.
Personal Auto Driver	Youthful	This system code is that identifies the youthful personal vehicle driver.
What>Reinsurance Contract		
Reinsurance Contract	Reinsurance Contract Begin Date	The calendar date that identifies when reinsurance contract begins.
Reinsurance Contract	Reinsurance Contract Ceded Loss Ratio	The ratio of losses and loss adjustment expenses incurred to premiums earned for the portion of exposure that is transferred to a reinsurance company.
Reinsurance Contract	Reinsurance Contract Category	The category of the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Cession Number	The unique identifier of the reinsurance contract cession.
Reinsurance Contract	Reinsurance Contract Certificate Number	The unique identifier assigned to the reinsurance contract certificate.
Reinsurance Contract	Reinsurance Contract End Date	The calendar date reinsurance contract ends.
Reinsurance Contract	Reinsurance Contract Facultative Commission Percent	The percentage commission paid to Reinsurer.
Reinsurance Contract	Reinsurance Contract Layer	The reinsurance contract layer describes the amount of reinsurance provided in the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Type	The contract type for reinsurance contract dimension.
Reinsurance Contract	Reinsurance Contract Treaty Number	A unique identifier assigned to a reinsurance contract treaty.
When		
When	Calendar Month	The numeric representation of the month (1-12).

Table 22: Personal Auto (Continued)

Category	Filter	Description
When	Calendar Month Name	The name of a month (Jan, Feb, etc.).
When	Calendar Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Calendar Quarter Name	The name of a quarter (Q1 - Q4).
When	Calendar Year	The one-year period that begins on January 1 and ends on December 31.
When	Fiscal Month	The numeric representation of the month (1-12).
When	Fiscal Month Name	The name of a month (Jan, Feb, etc.).
When	Fiscal Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Fiscal Quarter Name	The name of a quarter (Q1 - Q4).
When	Fiscal Year	The year commencing with the effective date of the insurance policy or with an anniversary of that date.
Where		
Where	Insured City	The name of the city in the address.
Where	Insured Country	The country code in the address.
Where	Insured County	The county in the address.
Where	Insured District	The geographical district where the insured is located.
Where	Insured Latitude	The latitude location of the insured's address.
Where	Insured Longitude	The longitude location of the insured's address.
Where	Insured Postal Code	The full postal zip code as defined by company specifications.
Where	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Insured Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Where	Insured Region	The geographical region where insured is located.
Where	Insured State	The state of the insured's location.
Where	Insured Territory	The territory of the insured's location.
Where	Location of Loss City	The city where the loss occurred.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Where	Location of Loss Country	The country where the loss occurred.
Where	Location of Loss County	The county where the loss occurred.
Where	Location of Loss District	The district where the loss occurred.
Where	Location of Loss Latitude	The latitude location where the loss occurred.
Where	Location of Loss Longitude	The longitude location where the loss occurred.
Where	Location of Loss Postal Code	The full postal zip code as defined by company specifications.
Where	Location of Loss Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Location of Loss Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code. This is the sub code of the location where the loss occurred.
Where	Location of Loss Region	The geographical region where a loss occurred.
Where	Location of Loss State	The state where a loss occurred.
Where	Location of Loss Tax Location ID	The Tax Location Identifier of the location where a loss occurred.
Where	Location of Loss Territory	The territory where a loss occurred.
Additional Filters>Claim Detail		
Claim Detail	Case Made Retroactive Date	The calendar date that the claim case was made retroactive.
Claim Detail	Case Management Assigned Date	The calendar date that claim management is assigned to claim.
Claim Detail	Claim Closed Date	The date on which the insurance company closed the claim.
Claim Detail	Claim Loss Date	The calendar date on which an accident or loss occurred regardless of when the claim was filed.
Claim Detail	Claim Loss Month	The month that the claim loss period began.
Claim Detail	Claim Loss Quarter	The quarter that the claim loss period began.
Claim Detail	Claim Loss Year	The year that the claim loss period began.
Claim Detail	Claim Number	A unique number assigned to each claim.
Claim Detail	Claim Opened Date	The date a claim was opened.
Claim Detail	Claim Reclosed Date	The date a claim was closed after being reopened.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Claim Detail	Claim Reopened Date	The date on which a closed claim was changed to open status.
Claim Detail	Claim Report Class Code	The code describes the class code report class applicable to the claim, regardless of the class codes on the policy.
Claim Detail	Claim Report Date	This calendar date represents when the claim was reported to the insurance carrier.
Claim Detail	Claim Reported By	The source of a claim report.
Claim Detail	Claim Reported Date	The date the insured filed the claim with the insurance carrier.
Claim Detail	Claim Status	The process condition of a claim.
Claim Detail	Claims Made Basis Code	The code identifies whether or not the claims made basis is being used for reporting of claims.
Claim Detail	First Claim Contact Date	The calendar date that the claimant was first contacted by the insuring company or its representative.
Claim Detail	First Claim Payment Date	The calendar date when the first payment was made on a claim.
Claim Detail	Fraud Claim Code	The code to indicate potential fraudulent claim based on adjusters' investigation.
Claim Detail	Last Claim Payment Date	The calendar date when the last claim payment was issued.
Claim Detail	Last Salvage Payment Date	The calendar date when the last payment was made associated with salvage.
Claim Detail	Last Subrogation Payment Date	The calendar date when Last Subrogation Payment was received.
Claim Detail	Loss Time	The number that identifies the time a loss occurred.
Claim Detail	Number of Rental Days	The total count of days a replacement item is rented.
Claim Detail	Number of Repair Days	The total count of days required to repair an item.
Claim Detail	Number of Storage Days	The total count of days an item is stored.
Additional Filters>Policy Detail		
Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Policy Detail	Cancel Reason	The system code describes the reason for a cancellation.
Policy Detail	Exposure Basis	The denomination in which the exposure units are expressed.
Policy Detail	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
Policy Detail	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
Policy Detail	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
Policy Detail	Package Discount Percent	The percentage of premium waived when Package Discount applies.
Policy Detail	Package Modification Assignment Code	This code indicates the package modification assignment.
Policy Detail	Package Modification Factor	The percentage of premium waived as a result of packaging coverages.
Policy Detail	Policy Age	The number of months in policy term.
Policy Detail	Policy Cancel Date	The date a policy or coverage was terminated by cancellation.
Policy Detail	Policy Effective Date	The effective date of the policy related to this transaction.
Policy Detail	Policy Expiration Date	The expiration date of the policy related to this transaction.
Policy Detail	Policy Number	A unique client-assigned number identifying each policy.
Policy Detail	Policy Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
Policy Detail	Policy Type	The description of the type of coverage included in a policy.
Policy Detail	Policy Type Category	The categorization of the type of coverage a policy includes.
Policy Detail	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
Policy Detail	Premium Basis	The basis to which rates are applied to determine premiums.

Table 22: Personal Auto (Continued)

Category	Filter	Description
Policy Detail	Renewal Term	The length of the renewal policy period (term) in months.
Policy Detail	Supporting Business Discount Percent	The percentage of premium waived when supporting business discount applies.
Policy Detail	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.
Additional Filters>Cancelled/Effective/Expired/Inforce/Retained/Written Policy Detail		
Cancelled Policy Detail, Effective Policy Detail, Expired Policy Detail, Inforce Policy Detail, Retained Policy Detail, Written Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.
	Cancel Reason	The system code describes the reason for a cancellation.
	Exposure Basis	The denomination in which the exposure units are expressed.
	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
	Package Discount Percent	The percentage of premium waived when Package Discount applies.
	Package Modification Assignment Code	This code indicates the package modification assignment.
	Package Modification Factor	The percentage of premium waived as a result of packaging coverages.
	Policy Cancellation Date	The date a policy or coverage was terminated by cancellation.
	Policy Effective Date	The effective date of the policy related to this transaction.
	Policy Expiration Date	The expiration date of the policy related to this transaction.

Table 22: Personal Auto (Continued)

Category	Filter	Description
	Policy Number	A unique client-assigned number identifying each policy.
	Policy Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
	Policy Type	The description of the type of coverage included in a policy.
	Policy Type Category	The categorization of the type of coverage a policy includes.
	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
	Premium Basis	The basis to which rates are applied to determine premiums.
	Renewal Term	The length of the renewal policy period (term) in months.
	Supporting Business Discount Percent	The percentage of premium waived when supporting business discount applies.
	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.

PERSONAL UMBRELLA

Table 23: Personal Umbrella

Category	Filter	Description
Who>Assistant Underwriter		
Assistant Underwriter	Assistant Underwriter Birth Date	The assistant underwriter's birth date.
Assistant Underwriter	Assistant Underwriter City	The city where the assistant underwriter lives.
Assistant Underwriter	Assistant Underwriter Contact	The description of the contact method for the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Contact Type	The contact method for the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Country	The country of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter County	The county of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter District	The district of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Government ID Number	The government-issued identifier issued to the assistant underwriter. For example, in the USA it is SSN or FEIN.
Assistant Underwriter	Assistant Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Latitude	The latitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Longitude	The longitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Name	The name of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Number	The number or other identifier that identifies the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Present Employment Start Year	The calendar year that the assistant underwriter began employment at current employer.
Assistant Underwriter	Assistant Underwriter Postal Code	The full postal zip code as defined by company specifications.
Assistant Underwriter	Assistant Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Assistant Underwriter	Assistant Underwriter Region	The geographical region of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter State	The state of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Territory	The territory of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Tax Location ID	The Tax Location Identifier for the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Type	The classification of the assistant underwriter's role.
Who>Insurance Company		
Insurance Company	Insurance Company AM Best Number	The number or other identifier that identifies the insurance company AM Best Rating.
Insurance Company	Insurance Company Business Start Date	The calendar date when the insurance company began business operations.
Insurance Company	Insurance Company Contact	The description of the insurance company contact type.
Insurance Company	Insurance Company Contact Type	The contact method for the insurance company.
Insurance Company	Insurance Company Country	The country where the insurance company is located.
Insurance Company	Insurance Company County	The county where insurance company is located.
Insurance Company	Insurance Company City	The city where the insurance company is located.
Insurance Company	Insurance Company DBA	The operational name (Doing Business As) of an insurance company.
Insurance Company	Insurance Company District	The district where the insurance company is located.
Insurance Company	Insurance Company Government ID Number	The government-issued identifier issued to the insurance company. For example, in the USA it is SSN or FEIN.
Insurance Company	Insurance Company ISO Code	The insurance company's Insurance Service Office (ISO) Code.
Insurance Company	Insurance Company Latitude	The latitude location of insurance company.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Insurance Company	Insurance Company Longitude	The longitude location of insurance company
Insurance Company	Insurance Company Name	The name of the insurance company.
Insurance Company	Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Insurance Company	Insurance Company NAICS Code	The North America Industry Class System (NAICS) Code assigned to insurance company.
Insurance Company	Insurance Company Nature of Business	The type or category of the business activities done by the insurance company.
Insurance Company	Insurance Company Number of Employees	The count of people employed at the insurance company.
Insurance Company	Insurance Company Postal Code	The full postal zip code as defined by the insurance company specifications.
Insurance Company	Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Insurance Company	Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Insurance Company	Insurance Company Region	The geographical region where the insurance company is located.
Insurance Company	Insurance Company State	The state where the insurance company is located.
Insurance Company	Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insurance company.
Insurance Company	Insurance Company Territory	The territory where the insurance company is located.
Insurance Company	Insurance Company Tax Location ID	The Tax Location Identifier for the insurance company's location.
Insurance Company	Insurance Company Type	The classification of the insurance company's primary operations.
Who>Insured		
Insured	Insured Audit Frequency	The indicator of when an insured audit is scheduled.
Insured	Insured Audit Type	The classification of the audit activities conducted on insured.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Insured	Insured Birth Date	The calendar date when insured was born.
Insured	Insured Business Start Date Identifier	The calendar date when the insured business operations began.
Insured	Insured City	The name of the city in the address
Insured	Insured Contact	The description of the insured's contact type.
Insured	Insured Contact Type	The contact method for the insured.
Insured	Insured County	The county in the address.
Insured	Insured Country	The country code in the address.
Insured	Insured Credit Score	The code or number that represents the insured credit rating score.
Insured	Insured DBA	The operational name (Doing Business As) of an insured's business.
Insured	Insured Gender	The gender (Male or Female) of the insured.
Insured	Insured Government Identification Number	The government-issued identifier issued to the insured. For example, in the USA it is SSN or FEIN.
Insured	Insured Latitude	The latitude location of the insured's address.
Insured	Insured Longitude	The longitude location of the insured location.
Insured	Insured Marital Status	The present marital condition (single, married, divorced, widowed) of the insured.
Insured	Insured Name	The full name of the insured.
Insured	Insured NAICS Code	The North America Industry Class System (NAICS) Code assigned to insured.
Insured	Insured Nature of Business	The type or category of the business activities done by the insured.
Insured	Insured Number of Employees	The count of people employed by insured.
Insured	Insured Postal Code	The full postal zip code as defined by company specifications.
Insured	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code
Insured	Insured Postal SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Insured	Insured Present Employment Start Year	The calendar year that the insured began working for their current employer.
Insured	Insured Prior Insurance Company	Name of insurance company that last provided insurance prior to policy inception.
Insured	Insured Region	The geographical region where insured is located.
Insured	Insured Report Period	The description of the timeframe of activities considered in an insured report
Insured	Insured Risk Grade	This code represents the AM Best or company defined risk grade for insured.
Insured	Insured SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insured.
Insured	Insured State	The state of the insured's location.
Insured	Insured Tax Location Identifier	The Tax Location Identifier for the insured's location.
Insured	Insured Territory	The territory of the insured's location.
Insured	Insured Type	The type of entity that contracted with insurance company to obtain a policy.
Who>Parent Insurance Company		
Parent Insurance Company	Parent Insurance Company AM Best Number	The number or other identifier that identifies the parent insurance company AM Best Rating.
Parent Insurance Company	Parent Insurance Company Business Start Date	The calendar date when the parent insurance company began business operations.
Parent Insurance Company	Parent Insurance Company City	The city where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Contact	The description of the parent insurance company contact type.
Parent Insurance Company	Parent Insurance Company Contact Type	The contact method for the parent insurance company.
Parent Insurance Company	Parent Insurance Company County	The county where parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Country	The country where the parent insurance company is located.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Parent Insurance Company	Parent Insurance Company DBA	The operational name (Doing Business As) of an parent insurance company.
Parent Insurance Company	Parent Insurance Company District	The district where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Government ID Number	The government-issued identifier issued to the parent insurance company. For example, in the USA it is SSN or FEIN.
Parent Insurance Company	Parent Insurance Company ISO Code	The parent insurance company's Insurance Service Office (ISO) Code.
Parent Insurance Company	Parent Insurance Company Latitude	The latitude location of parent insurance company.
Parent Insurance Company	Parent Insurance Company Longitude	The longitude location of insurance company
Parent Insurance Company	Parent Insurance Company Name	The name of the parent insurance company.
Parent Insurance Company	Parent Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Parent Insurance Company	Parent Insurance Company NAICS Code	The North America Industry Class System (NAICS) code assigned to parent insurance company.
Parent Insurance Company	Parent Insurance Company Nature of Business	The type or category of the business activities done by the parent insurance company.
Parent Insurance Company	Parent Insurance Company Number of Employees	The count of people employed at the parent insurance company.
Parent Insurance Company	Parent Insurance Company Postal Code	The full postal zip code as defined by the parent insurance company specifications.
Parent Insurance Company	Parent Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Parent Insurance Company	Parent Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Parent Insurance Company	Parent Insurance Company Region	The geographical region where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the parent insurance company.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Parent Insurance Company	Parent Insurance Company State	The state where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Tax Location ID	The Tax Location Identifier for the parent insurance company's location.
Parent Insurance Company	Parent Insurance Company Territory	The territory where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Type	The classification of the parent insurance company's primary operations.
Who>Producer		
Producer	Producer Birth Date	The calendar date that details when is a producer's date of birth.
Producer	Producer Business Start Date	The calendar date when the producer began business operations.
Producer	Producer City	The city where the producer is located.
Producer	Producer Contact	The description of a producer's contact method.
Producer	Producer Contact Type	The contact method for a producer.
Producer	Producer County	The county where the producer is located.
Producer	Producer Country	The country where the producer is located.
Producer	Producer DBA	The operational name (Doing Business As) of a producer's Business
Producer	Producer District	The district where the producer is located.
Producer	Producer Effective Date	The calendar date the producer appointment begins.
Producer	Producer Gender	The gender (Male or Female) of the producer.
Producer	Producer Government Identification Number	The government-issued identifier issued to the producer. For example, in the USA it is SSN or FEIN.
Producer	Producer Latitude	The latitude location of the producer.
Producer	Producer Longitude	The longitude location of the producer.
Producer	Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the producer.
Producer	Producer Name	The full name of the producer.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Producer	Producer NAICS Code	North America Industry Class System (NAICS) Code issued to producer.
Producer	Producer Nature of Business	The type or category of the business activities done by the producer.
Producer	Producer Number of Employees	The count of people employed by producer.
Producer	Producer Postal Code	The full postal zip code as defined by company specifications.
Producer	Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Producer	Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Producer	Producer Present Employment Start Year	The year when the producer began working for their current employer.
Producer	Producer Region	The geographical region where producer is located.
Producer	Producer Relationship Code	The code that identifies the producer Relationship.
Producer	Producer State	The state where producer is located.
Producer	Producer State License Number	The government-issued license number issued to the producer.
Producer	Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the producer.
Producer	Producer Tax Location ID	The Tax Location Identifier for the producer's location
Producer	Producer Territory	The territory where producer is located
Producer	Producer Type	This code represents the producer type.
Who>Reinsurance Company		
Reinsurance Company	Reinsurance Company Business Start Date	The calendar date when the reinsurance company began business operations.
Reinsurance Company	Reinsurance Company Contract	The description of the reinsurance company contract.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company Contact Type	The contact method for reinsurance company.
Reinsurance Company	Reinsurance Company County	The county where reinsurance company is located.
Reinsurance Company	Reinsurance Company Country	The country where reinsurance company is located.
Reinsurance Company	Reinsurance Company City	The city where reinsurance company is located.
Reinsurance Company	Reinsurance Company DBA	The operational name (Doing Business As) of a reinsurance company.
Reinsurance Company	Reinsurance Company District	District where reinsurance company is located.
Reinsurance Company	Reinsurance Company Latitude	The latitude location of reinsurance company.
Reinsurance Company	Reinsurance Company Longitude	The longitude location of reinsurance company.
Reinsurance Company	Reinsurance Company NAICS Code	North America Industry Class System (NAICS) Code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company Name	The name of the reinsurance company.
Reinsurance Company	Reinsurance Company Nature of Business	The type or category of the business activities done by the reinsurance company.
Reinsurance Company	Reinsurance Company Number	Identifier assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company Number of Employees	The count of people employed by the reinsurance company.
Reinsurance Company	Reinsurance Company Postal Code	The full postal zip code as defined by company specifications.
Reinsurance Company	Reinsurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Reinsurance Company	Reinsurance Company Postal Code SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Reinsurance Company	Reinsurance Company Region	The geographical region of reinsurance company.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company State	The state where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Tax Location Identifier	The Tax Location Identifier of the reinsurance company's location.
Reinsurance Company	Reinsurance Company Territory	The territory where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Type	The code that identifies reinsurance company type.
Who>Sub Producer		
Sub Producer	Sub Producer Birth Date	The calendar date that details when is a sub producer's Date of Birth.
Sub Producer	Sub Producer Business Start Date	The calendar date when the sub producer began business operations.
Sub Producer	Sub Producer City	The city where the sub producer is located.
Sub Producer	Sub Producer Contact	The description of a sub producer's contact method.
Sub Producer	Sub Producer Contact Type	The contact method for a sub producer.
Sub Producer	Sub Producer County	The county where the sub producer is located.
Sub Producer	Sub Producer Country	The country where the sub producer is located.
Sub Producer	Sub Producer DBA	The operational name (Doing Business As) of a sub producer's business.
Sub Producer	Sub Producer District	The district where the sub producer is located.
Sub Producer	Sub Producer Effective Date	The calendar date the sub producer appointment begins.
Sub Producer	Sub Producer Gender	The gender (Male or Female) of the sub producer.
Sub Producer	Sub Producer Government ID Number	The government-issued identifier issued to the sub producer. For example, in the USA it is SSN or FEIN.
Sub Producer	Sub Producer Latitude	The latitude location of sub producer.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Sub Producer	Sub Producer Longitude	The longitude location of sub producer.
Sub Producer	Sub Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the sub producer.
Sub Producer	Sub Producer Name	The full name of the sub producer.
Sub Producer	Sub Producer NAICS Code	The North America Industry Class System (NAICS) Code issued to sub producer.
Sub Producer	Sub Producer Nature of Business	The type or category of the business activities done by the sub producer.
Sub Producer	Sub Producer Number of Employees	The count of people employed by sub producer.
Sub Producer	Sub Producer Postal Code	The full postal zip code as defined by company specifications.
Sub Producer	Sub Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Sub Producer	Sub Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Sub Producer	Sub Producer Present Employment Start Year	Year when sub producer began working for their current employer.
Sub Producer	Sub Producer Region	The geographical region where the sub producer is located.
Sub Producer	Sub Producer State	The state where the sub producer is located.
Sub Producer	Sub Producer State_LIC_Number	The government-issued license number issued to the sub producer.
Sub Producer	Sub Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the sub producer.
Sub Producer	Sub Producer Tax Location ID	The Tax Location Identifier for the sub producer's location
Sub Producer	Sub Producer Territory	The territory where the sub producer is located
Sub Producer	Sub Producer Type	This code represents the sub producer type Standard Code
Who>Underwriter		

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Underwriter	Underwriter Birth Date	The underwriter's birth date.
Underwriter	Underwriter City	The city where the underwriter lives.
Underwriter	Underwriter Contact	The description of the contact method for the underwriter.
Underwriter	Underwriter Contact Type	The contact method for the underwriter.
Underwriter	Underwriter County	The county of the underwriter's location.
Underwriter	Underwriter Country	The country of the underwriter's location.
Underwriter	Underwriter District	The district of the underwriter's location.
Underwriter	Underwriter Government ID Number	The government-issued identifier issued to the underwriter. For example, in the USA it is SSN or FEIN.
Underwriter	Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Underwriter	Underwriter Latitude	The latitude location of the underwriter.
Underwriter	Underwriter Longitude	The longitude location of the underwriter.
Underwriter	Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the underwriter.
Underwriter	Underwriter Name	The name of the underwriter.
Underwriter	Underwriter Number	The number or other identifier that identifies the underwriter.
Underwriter	Underwriter Present Employment Start Year	The calendar year that the underwriter began employment at current employer.
Underwriter	Underwriter Postal Code	The full postal zip code as defined by company specifications.
Underwriter	Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Underwriter	Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Underwriter	Underwriter Region	The geographical region of the underwriter's location.
Underwriter	Underwriter State	The state of the underwriter's location.
Underwriter	Underwriter Tax Location ID	The Tax Location Identifier for the underwriter's location.
Underwriter	Underwriter Territory	The territory of the underwriter's location.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Underwriter	Underwriter Type	The classification of the underwriter's role.
What		
What	Currency Code	This system code identifies document currency.
What>Billing Account		
Billing Account	Billing Account Number	The number of the account in the billing system, if different than the policy system.
Billing Account	Method of Payment	The manner that the insured makes payments on billing account balance.
Billing Account	Payment Plan	The payment schedule applied to a policy balance.
Billing Account	Payment Service	The Payment Service code identifies the type of billing plan used for the policy.
What>Class		
Class	Class Code	A class code is a three to six character field used to classify the general characteristics of an employees function. Used for rating.
Class	Class State	The state associated with the insured address.
Class	Primary Class Code	In a situation where the class code is split into more than one useful breakout, this is the primary portion.
Class	Secondary Class Code	In a situation where the class code is split into more than one useful breakout, this is the secondary portion.
What>Coverage		
Coverage	Annual Statement Line	A code that indicates in which line of the annual statement a transaction belongs.
Coverage	Bureau Report Plan	Indicates the statistical plan code used for bureau reporting.
Coverage	Coverage	This field reports a code based on the type of coverage afforded on the insurance line policy. The aggregate of risks covered by the terms of a contract of insurance.
Coverage	Coverage Category	A way to group coverages within a line of business.
Coverage	Coverage Effective Date	The calendar date when the policy coverage begins.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Coverage	Coverage Expiration Date	The calendar date when the policy coverage ends.
Coverage	Coverage Part	An indicator of a line of business within a package policy.
Coverage	Secondary Coverage	A client defined code to further breakdown the type of coverage afforded on the insurance line policy.
Coverage	Statistical Plan Code	This code identifies the statistical plan for coverage.
What>Deductible		
Deductible	Deductible	The amount of loss that the policyholder is responsible to pay.
Deductible	Deductible Applies To	This code is used to identify to what the deductible applies.
Deductible	Deductible Basis	This code represents the basis applied to determine the deductible.
Deductible	Deductible Type	This code represents the deductible type that pertains to a particular policy coverage.
What>Distribution Channel		
Distribution Channel	Distribution Channel Name	The full name of the distribution channel.
Distribution Channel	Distribution Channel Number	The number or other identifier assigned to the distribution channel.
Distribution Channel	Distribution Channel Type	The classification of the activities of distribution channel.
Distribution Channel	Typical Commission Rate	The rate of commission given to a producer for a sale of a policy unless the commission rate is overridden.
What>Group Program		
Group Program	Group Program Anniversary Date	The calendar date that identifies the anniversary of a group program.
Group Program	Group Program Dividend Plan	The classification of the manner in which a group program dividend is paid.
Group Program	Group Program Dividend Date	The calendar date that identifies the dividend date of a group program.
Group Program	Group Program Member Count	This number identifies the group program.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Group Program	Group Program Name	The name of the program, other than state or national, that a group of policies are associated with.
Group Program	Group Program Natural Name	The name of the national program that a group of policies are associated with.
Group Program	Group Program Original Date	The calendar date that identifies group program Origination Date.
Group Program	Group Program Status	The description of the current condition of a program with which a group of policies is associated.
Group Program	Group Program State	The state associated with group program.
Group Program	Group Program Type	The type of program that is represented.
What>Personal Umbrella Policy		
Personal Umbrella Policy	Dwelling Fire Insurance Company Name	This value represents the name of insurance company that provides dwelling fire policy coverage for insured.
Personal Umbrella Policy	Dwelling Fire Personal Liability Limit	This value represents the personal liability coverage limit provided by dwelling fire policy owned by insured.
Personal Umbrella Policy	Dwelling Fire Policy Effective Date	This date represents the calendar date dwelling fire policy coverage begins.
Personal Umbrella Policy	Dwelling Fire Policy Expiration Date	This date represents the calendar date dwelling fire policy term ends.
Personal Umbrella Policy	Dwelling Fire Policy Number	This value represents a number or other identifier for a dwelling fire policy owned by named insured.
Personal Umbrella Policy	Homeowners Insurance Company Name	This value represents the insurance company name of the insured's homeowners policy.
Personal Umbrella Policy	Homeowners Personal Liability Limit	This value represents the personal liability limit included under an insured's homeowners insurance policy.
Personal Umbrella Policy	Homeowners Policy Effective Date	This date is when coverage begins for a homeowners policy.
Personal Umbrella Policy	Homeowners Policy Expiration Date	This calendar date represents when homeowners coverage policy term ends.
Personal Umbrella Policy	Homeowners Policy Number	This value represents a number or other identifier for a homeowners policy.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Personal Umbrella Policy	Personal Auto Insurance Company Name	This value represents the insurance company name that issued the insured's personal automobile policy.
Personal Umbrella Policy	Personal Auto Liability First Limit	This value represents the personal vehicle liability limit first limit.
Personal Umbrella Policy	Personal Auto Liability Second Limit	This value represents the personal vehicle liability limit second limit.
Personal Umbrella Policy	Personal Auto Policy Effective Date	This calendar date represents when insured's personal vehicle policy coverage began.
Personal Umbrella Policy	Personal Auto Policy Expiration Date	This calendar date represents when insured's personal vehicle policy term ends.
Personal Umbrella Policy	Personal Auto Policy Number	This value represents the personal vehicle policy number.
Personal Umbrella Policy	Personal Auto Property Damage Limit	This value represents the personal vehicle property damage limit.
Personal Umbrella Policy	Personal Auto Uninsured Motorist First Limit	This value represents the personal vehicle uninsured/underinsured motorist first limit.
Personal Umbrella Policy	Personal Auto Uninsured Motorist Second Limit	This value represents the personal vehicle uninsured/underinsured motorist second limit.
Personal Umbrella Policy	Personal Auto Uninsured Motorist Third Limit	This value represents the personal vehicle uninsured/underinsured motorist third limit.
What>Reinsurance Contract		
Reinsurance Contract	Reinsurance Contract Begin Date	The calendar date that identifies when reinsurance contract begins.
Reinsurance Contract	Reinsurance Contract Ceded Loss Ratio	The ratio of losses and loss adjustment expenses incurred to premiums earned for the portion of exposure that is transferred to a reinsurance company.
Reinsurance Contract	Reinsurance Contract Category	The category of the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Cession Number	The unique identifier of the reinsurance contract cession.
Reinsurance Contract	Reinsurance Contract Certificate Number	The unique identifier assigned to the reinsurance contract certificate.
Reinsurance Contract	Reinsurance Contract End Date	The calendar date reinsurance contract ends.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Reinsurance Contract	Reinsurance Contract Facultative Commission Percent	The percentage commission paid to Reinsurer.
Reinsurance Contract	Reinsurance Contract Layer	The reinsurance contract layer describes the amount of reinsurance provided in the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Treaty Number	A unique identifier assigned to a reinsurance contract treaty.
Reinsurance Contract	Reinsurance Contract Type	The contract type for reinsurance contract dimension.
When		
When	Calendar Month	The numeric representation of the month (1-12).
When	Calendar Month Name	The name of a month (Jan, Feb, etc.).
When	Calendar Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Calendar Quarter Name	The name of a quarter (Q1 - Q4).
When	Calendar Year	The one-year period that begins on January 1 and ends on December 31.
When	Fiscal Month	The numeric representation of the month (1-12).
When	Fiscal Month Name	The name of a month (Jan, Feb, etc.).
When	Fiscal Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Fiscal Quarter Name	The name of a quarter (Q1 - Q4).
When	Fiscal Year	The year commencing with the effective date of the insurance policy or with an anniversary of that date.
Where		
Where	Insured City	The name of the city in the address.
Where	Insured Country	The country code in the address.
Where	Insured County	The county in the address.
Where	Insured District	The geographical district where the insured is located.
Where	Insured Latitude	The latitude location of the insured's address.
Where	Insured Longitude	The longitude location of the insured's address.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Where	Insured Postal Code	The full postal zip code as defined by company specifications.
Where	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Insured Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Where	Insured Region	The geographical region where insured is located.
Where	Insured State	The state of the insured's location.
Where	Insured Territory	The territory of the insured's location.
Where	Location of Loss City	The city where the loss occurred.
Where	Location of Loss Country	The country where the loss occurred.
Where	Location of Loss County	The county where the loss occurred.
Where	Location of Loss District	The district where the loss occurred.
Where	Location of Loss Latitude	The latitude location where the loss occurred.
Where	Location of Loss Longitude	The longitude location where the loss occurred.
Where	Location of Loss Postal Code	The full postal zip code as defined by company specifications.
Where	Location of Loss Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Location of Loss Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code. This is the sub code of the location where the loss occurred.
Where	Location of Loss Region	The geographical region where a loss occurred.
Where	Location of Loss State	The state where a loss occurred.
Where	Location of Loss Tax Location ID	The Tax Location Identifier of the location where a loss occurred.
Where	Location of Loss Territory	The territory where a loss occurred.
Additional Filters>Claim Detail		
Claim Detail	Case Made Retroactive Date	The calendar date that the claim case was made retroactive.
Claim Detail	Case Management Assigned Date	The calendar date that claim management is assigned to claim.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Claim Detail	Claim Closed Date	The date on which the insurance company closed the claim.
Claim Detail	Claim Loss Date	The date on which an accident or loss occurred regardless of when the claim was filed.
Claim Detail	Claim Loss Month	The month that the claim loss period began.
Claim Detail	Claim Loss Quarter	The quarter that the claim loss period began.
Claim Detail	Claim Loss Year	The year that the claim loss period began.
Claim Detail	Claim Number	A unique number assigned to each claim.
Claim Detail	Claim Opened Date	The date a claim was opened.
Claim Detail	Claim Reclosed Date	The date a claim was closed after being reopened.
Claim Detail	Claim Reopened Date	The date on which a closed claim was changed to open status.
Claim Detail	Claim Report Class Code	The code describes the class code report class applicable to the claim, regardless of the class codes on the policy.
Claim Detail	Claim Reported By	The source of claim report.
Claim Detail	Claim Reported Date	The date the insured filed the claim with the insurance carrier.
Claim Detail	Claim Status	The process condition of a claim.
Claim Detail	Claims Made Basis Code	The code identifies whether or not the claims made basis is being used for reporting of claims.
Claim Detail	First Claim Contact Date	The calendar date that the claimant was first contacted by the insuring company or its representative.
Claim Detail	First Claim Payment Date	The calendar date when the first payment was made on a claim.
Claim Detail	Fraud Claim Code	The code to indicate potential fraudulent claim based on adjusters' investigation.
Claim Detail	Last Claim Payment Date	The calendar date when the last claim payment was issued.
Claim Detail	Last Salvage Payment Date	The calendar date when the last payment was made associated with salvage.
Claim Detail	Last Subrogation Payment Date	The calendar date when last subrogation payment was received.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Claim Detail	Loss Time	The number that identifies the time a loss occurred.
Claim Detail	Number of Rental Days	The total count of days a replacement item is rented.
Claim Detail	Number of Repair Days	The total count of days required to repair an item.
Claim Detail	Number of Storage Days	The total count of days an item is stored.
Additional Filters>Policy Detail		
Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.
Policy Detail	Cancel Reason	The system code describes the reason for a cancellation.
Policy Detail	Exposure Basis	The denomination in which the exposure units are expressed.
Policy Detail	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
Policy Detail	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
Policy Detail	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
Policy Detail	Package Discount Percent	The percentage of premium waived when Package Discount applies.
Policy Detail	Package Modification Assignment Code	This code indicates the package modification assignment.
Policy Detail	Package Modification Factor	The percentage of premium waived as a result of packaging coverages.
Policy Detail	Policy Age	The number of months in policy term.
Policy Detail	Policy Cancellation Date	The date a policy or coverage was terminated by cancellation.
Policy Detail	Policy Effective Date	The effective date of the policy related to this transaction.
Policy Detail	Policy Expiration Date	The expiration date of the policy related to this transaction.
Policy Detail	Policy Number	A unique client-assigned number identifying each policy.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
Policy Detail	Policy Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
Policy Detail	Policy Type	The description of the type of coverage included in a policy.
Policy Detail	Policy Type Category	The categorization of the type of coverage a policy includes.
Policy Detail	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
Policy Detail	Premium Basis	The basis to which rates are applied to determine premiums.
Policy Detail	Renewal Term	The length of the renewal policy period (term) in months.
Policy Detail	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.
Policy Detail	Supporting Business Type Discount	The percentage of premium waived when supporting business discount applies.
What>Cancelled Policy Detail		
Cancelled Policy Detail, Effective PolicyDetail, Expired Policy Detail, InForce Policy Detail, Retained Policy Detail, Written Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.
	Cancel Reason	The system code describes the reason for a cancellation.
	Exposure Basis	The denomination in which the exposure units are expressed.
	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
	Package Discount Percent	The percentage of premium waived when Package Discount applies.

Table 23: Personal Umbrella (Continued)

Category	Filter	Description
	Package Modification Assignment Code	This code indicates the package modification assignment.
	Package Modification Factor	The percentage of premium waived as a result of packaging coverages.
	Policy Cancellation Date	The date a policy or coverage was terminated by cancellation.
	Policy Effective Date	The effective date of the policy related to this transaction.
	Policy Expiration Date	The expiration date of the policy related to this transaction.
	Policy Number	A unique client-assigned number identifying each policy.
	Policy Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
	Policy Type	The description of the type of coverage included in a policy.
	Policy Type Category	The categorization of the type of coverage a policy includes.
	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
	Premium Basis	The basis to which rates are applied to determine premiums.
	Renewal Term	The length of the renewal policy period (term) in months.
	Supporting Business Discount Percent	This number represents the percentage of premium waived when supporting business discount applies.
	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.

POLICY TRANSACTION

Table 24: Policy Transaction

Category	Filter	Description
Who>Assistant Underwriter		
Assistant Underwriter	Assistant Underwriter	The name of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Birth Date	The assistant underwriter's birth date.
Assistant Underwriter	Assistant Underwriter City	The city where the assistant underwriter lives.
Assistant Underwriter	Assistant Underwriter Contact	The description of the contact method for the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Contact Type	The contact method for the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Country	The country of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter County	The county of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter District	The district of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Government ID Number	The government-issued identifier issued to the assistant underwriter. For example, in the USA it is SSN or FEIN.
Assistant Underwriter	Assistant Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Latitude	The latitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Longitude	The longitude location of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Number	The number or other identifier that identifies the assistant underwriter.
Assistant Underwriter	Assistant Underwriter Present Employment Start Year	The calendar year that the assistant underwriter began employment at current employer.
Assistant Underwriter	Assistant Underwriter Postal Code	The full postal zip code as defined by company specifications.
Assistant Underwriter	Assistant Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Assistant Underwriter	Assistant Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Assistant Underwriter	Assistant Underwriter Region	The geographical region of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter State	The state of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Territory	The territory of the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Tax Location ID	The Tax Location Identifier for the assistant underwriter's location.
Assistant Underwriter	Assistant Underwriter Type	The classification of the assistant underwriter's role.
Who>Insurance Company		
Insurance Company	Insurance Company AM Best Number	The number or other identifier that identifies the insurance company AM Best Rating.
Insurance Company	Insurance Company Business Start Date	The calendar date when the insurance company began business operations.
Insurance Company	Insurance Company Contact	The description of the insurance company contact type.
Insurance Company	Insurance Company Contact Type	The contact method for the insurance company.
Insurance Company	Insurance Company Country	The country where the insurance company is located.
Insurance Company	Insurance Company County	The county where insurance company is located.
Insurance Company	Insurance Company City	The city where the insurance company is located.
Insurance Company	Insurance Company DBA	The operational name (Doing Business As) of an insurance company.
Insurance Company	Insurance Company District	The district where the insurance company is located.
Insurance Company	Insurance Company Government ID Number	The government-issued identifier issued to the insurance company. For example, in the USA it is SSN or FEIN.
Insurance Company	Insurance Company ISO Code	The insurance company's Insurance Service Office (ISO) Code.
Insurance Company	Insurance Company Latitude	The latitude location of insurance company.

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Insurance Company	Insurance Company Longitude	The longitude location of insurance company
Insurance Company	Insurance Company Name	The name of the insurance company.
Insurance Company	Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Insurance Company	Insurance Company NAICS Code	The North America Industry Class System (NAICS) Code assigned to insurance company.
Insurance Company	Insurance Company Nature of Business	The type or category of the business activities done by the insurance company.
Insurance Company	Insurance Company Number of Employees	The count of people employed at the insurance company.
Insurance Company	Insurance Company Postal Code	The full postal zip code as defined by the insurance company specifications.
Insurance Company	Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Insurance Company	Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Insurance Company	Insurance Company Region	The geographical region where the insurance company is located.
Insurance Company	Insurance Company State	The state where the insurance company is located.
Insurance Company	Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insurance company.
Insurance Company	Insurance Company Type	The classification of the insurance company's primary operations.
Insurance Company	Insurance Company Territory	The territory where the insurance company is located.
Insurance Company	Insurance Company Tax Location ID	The Tax Location Identifier for the insurance company's location.
Who>Insured		
Insured	Insured Audit Frequency	The indicator of when an insured audit is scheduled.
Insured	Insured Audit Type	The classification of the audit activities conducted on insured.

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Insured	Insured Birth Date	The calendar date when insured was born.
Insured	Insured Business Start Date Identifier	The calendar date when the insured business operations began.
Insured	Insured City	The name of the city in the address
Insured	Insured Contact	The description of the insured's contact type.
Insured	Insured Contact Type	The contact method for the insured.
Insured	Insured County	The county in the address.
Insured	Insured Country	The country code in the address.
Insured	Insured Credit Score	The code or number that represents the insured credit rating score.
Insured	Insured DBA	The operational name (Doing Business As) of an insured's business.
Insured	Insured Gender	The gender (Male or Female) of the insured.
Insured	Insured Government Identification Number	The government-issued identifier issued to the insured. For example, in the USA it is SSN or FEIN.
Insured	Insured Latitude	The latitude location of the insured's address.
Insured	Insured Longitude	The longitude location of the insured location.
Insured	Insured Marital Status	The present marital condition (single, married, divorced, widowed) of the insured.
Insured	Insured Name	The full name of the insured.
Insured	Insured NAICS Code	The North America Industry Class System (NAICS) Code assigned to insured.
Insured	Insured Nature of Business	The type or category of the business activities done by the insured.
Insured	Insured Number of Employees	The count of people employed by insured.
Insured	Insured Postal Code	The full postal zip code as defined by company specifications.
Insured	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code
Insured	Insured Postal SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Insured	Insured Present Employment Start Year	The calendar year that the insured began working for their current employer.
Insured	Insured Prior Insurance Company	Name of insurance company that last provided insurance prior to policy inception.
Insured	Insured Region	The geographical region where insured is located.
Insured	Insured Report Period	The description of the timeframe of activities considered in an insured report
Insured	Insured Risk Grade	This code represents the AM Best or company defined risk grade for insured.
Insured	Insured SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the insured.
Insured	Insured State	The state of the insured's location.
Insured	Insured Tax Location Identifier	The Tax Location Identifier for the insured's location.
Insured	Insured Territory	The territory of the insured's location.
Insured	Insured Type	The type of entity that contracted with insurance company to obtain a policy.
Insured	Policyholder Name	The name of the insured.
Who>Parent Insurance Company		
Parent Insurance Company	Parent Insurance Company AM Best Number	The number or other identifier that identifies the parent insurance company AM Best Rating.
Parent Insurance Company	Parent Insurance Company Business Start Date	The calendar date when the parent insurance company began business operations.
Parent Insurance Company	Parent Insurance Company City	The city where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Contact	The description of the parent insurance company contact type.
Parent Insurance Company	Parent Insurance Company Contact Type	The contact method for the parent insurance company.
Parent Insurance Company	Parent Insurance Company County	The county where parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Country	The country where the parent insurance company is located.

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Parent Insurance Company	Parent Insurance Company DBA	The operational name (Doing Business As) of an parent insurance company.
Parent Insurance Company	Parent Insurance Company District	The district where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Government ID Number	The government-issued identifier issued to the parent insurance company. For example, in the USA it is SSN or FEIN.
Parent Insurance Company	Parent Insurance Company ISO Code	The parent insurance company's Insurance Service Office (ISO) Code.
Parent Insurance Company	Parent Insurance Company Latitude	The latitude location of parent insurance company.
Parent Insurance Company	Parent Insurance Company Longitude	The longitude location of insurance company
Parent Insurance Company	Parent Insurance Company Name	The name of the parent insurance company.
Parent Insurance Company	Parent Insurance Company NCCI Code	The Insurance company National Council on Compensation Insurance (NCCI) Code.
Parent Insurance Company	Parent Insurance Company NAICS Code	The North America Industry Class System (NAICS) code assigned to parent insurance company.
Parent Insurance Company	Parent Insurance Company Nature of Business	The type or category of the business activities done by the parent insurance company.
Parent Insurance Company	Parent Insurance Company Number of Employees	The count of people employed at the parent insurance company.
Parent Insurance Company	Parent Insurance Company Postal Code	The full postal zip code as defined by the parent insurance company specifications.
Parent Insurance Company	Parent Insurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Parent Insurance Company	Parent Insurance Company Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Parent Insurance Company	Parent Insurance Company Region	The geographical region where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the parent insurance company.

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Parent Insurance Company	Parent Insurance Company State	The state where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Tax Location ID	The Tax Location Identifier for the parent insurance company's location.
Parent Insurance Company	Parent Insurance Company Territory	The territory where the parent insurance company is located.
Parent Insurance Company	Parent Insurance Company Type	The classification of the parent insurance company's primary operations.
Who>Reinsurance Company		
Reinsurance Company	Reinsurance Company Business Start Date	The calendar date when the reinsurance company began business operations.
Reinsurance Company	Reinsurance Company Contract	The description of the reinsurance company contract.
Reinsurance Company	Reinsurance Company Contact Type	The contact method for reinsurance company.
Reinsurance Company	Reinsurance Company County	The county where reinsurance company is located.
Reinsurance Company	Reinsurance Company Country	The country where reinsurance company is located.
Reinsurance Company	Reinsurance Company City	The city where reinsurance company is located.
Reinsurance Company	Reinsurance Company DBA	The operational name (Doing Business As) of a reinsurance company.
Reinsurance Company	Reinsurance Company District	District where reinsurance company is located.
Reinsurance Company	Reinsurance Company Latitude	The latitude location of reinsurance company.
Reinsurance Company	Reinsurance Company Longitude	The longitude location of reinsurance company.
Reinsurance Company	Reinsurance Company NAICS Code	North America Industry Class System (NAICS) Code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company Name	The name of the reinsurance company.
Reinsurance Company	Reinsurance Company Nature of Business	The type or category of the business activities done by the reinsurance company.

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Reinsurance Company	Reinsurance Company Number	Identifier assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company Number of Employees	The count of people employed by the reinsurance company.
Reinsurance Company	Reinsurance Company Postal Code	The full postal zip code as defined by company specifications.
Reinsurance Company	Reinsurance Company Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Reinsurance Company	Reinsurance Company Postal Code SUB Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Reinsurance Company	Reinsurance Company Region	The geographical region of reinsurance company.
Reinsurance Company	Reinsurance Company SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the reinsurance company.
Reinsurance Company	Reinsurance Company State	The state where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Tax Location Identifier	The Tax Location Identifier of the reinsurance company's location.
Reinsurance Company	Reinsurance Company Territory	The territory where the reinsurance company is located.
Reinsurance Company	Reinsurance Company Type Code	The code that identifies reinsurance company type.
Who>Sub Producer		
Sub Producer	Sub Producer Birth Date	The calendar date that details when is a sub producer's Date of Birth.
Sub Producer	Sub Producer Business Start Date	The calendar date when the sub producer began business operations.
Sub Producer	Sub Producer City	The city where the sub producer is located.
Sub Producer	Sub Producer Contact	The description of a sub producer's contact method.
Sub Producer	Sub Producer Contact Type	The contact method for a sub producer.
Sub Producer	Sub Producer County	The county where the sub producer is located.

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Sub Producer	Sub Producer Country	The country where the sub producer is located.
Sub Producer	Sub Producer DBA	The operational name (Doing Business As) of a sub producer's business.
Sub Producer	Sub Producer District	The district where the sub producer is located.
Sub Producer	Sub Producer Effective Date	The calendar date the sub producer appointment begins.
Sub Producer	Sub Producer Gender	The gender (Male or Female) of the sub producer.
Sub Producer	Sub Producer Government ID Number	The government-issued identifier issued to the sub producer. For example, in the USA it is SSN or FEIN.
Sub Producer	Sub Producer Latitude	The latitude location of sub producer.
Sub Producer	Sub Producer Longitude	The longitude location of sub producer.
Sub Producer	Sub Producer Marital Status	The present marital condition (single, married, divorced, widowed) of the sub producer.
Sub Producer	Sub Producer Name	The full name of the sub producer.
Sub Producer	Sub Producer NAICS Code	The North America Industry Class System (NAICS) Code issued to sub producer.
Sub Producer	Sub Producer Nature of Business	The type or category of the business activities done by the sub producer.
Sub Producer	Sub Producer Number of Employees	The count of people employed by sub producer.
Sub Producer	Sub Producer Postal Code	The full postal zip code as defined by company specifications.
Sub Producer	Sub Producer Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Sub Producer	Sub Producer Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Sub Producer	Sub Producer Present Employment Start Year	Year when sub producer began working for their current employer.
Sub Producer	Sub Producer Region	The geographical region where the sub producer is located.
Sub Producer	Sub Producer State	The state where the sub producer is located.

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Sub Producer	Sub Producer State_LIC_Number	The government-issued license number issued to the sub producer.
Sub Producer	Sub Producer SIC Code	The Standard Industrial Classification (SIC) Code is an industry code that identifies the classification of business activity. This is the code assigned to the sub producer.
Sub Producer	Sub Producer Tax Location ID	The Tax Location Identifier for the sub producer's location
Sub Producer	Sub Producer Territory	The territory where the sub producer is located
Sub Producer	Sub Producer Type	This code represents the sub producer type.
Who>Underwriter		
Underwriter	Underwriter Birth Date	The underwriter's birth date.
Underwriter	Underwriter City	The city where the underwriter lives.
Underwriter	Underwriter Contact	The description of the contact method for the underwriter.
Underwriter	Underwriter Contact Type	The contact method for the underwriter.
Underwriter	Underwriter County	The county of the underwriter's location.
Underwriter	Underwriter Country	The country of the underwriter's location.
Underwriter	Underwriter District	The district of the underwriter's location.
Underwriter	Underwriter Government ID Number	The government-issued identifier issued to the underwriter. For example, in the USA it is SSN or FEIN.
Underwriter	Underwriter Gender	The gender (Male or Female) of the assistant underwriter.
Underwriter	Underwriter Latitude	The latitude location of the underwriter.
Underwriter	Underwriter Longitude	The longitude location of the underwriter.
Underwriter	Underwriter Marital Status	The present marital condition (single, married, divorced, widowed) of the underwriter.
Underwriter	Underwriter Name	The name of the underwriter.
Underwriter	Underwriter Number	The number or other identifier that identifies the underwriter.
Underwriter	Underwriter Present Employment Start Year	The calendar year that the underwriter began employment at current employer.
Underwriter	Underwriter Postal Code	The full postal zip code as defined by company specifications.

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Underwriter	Underwriter Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Underwriter	Underwriter Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Underwriter	Underwriter Region	The geographical region of the underwriter's location.
Underwriter	Underwriter State	The state of the underwriter's location.
Underwriter	Underwriter Tax Location ID	The Tax Location Identifier for the underwriter's location.
Underwriter	Underwriter Territory	The territory of the underwriter's location.
Underwriter	Underwriter Type	The classification of the underwriter's role.
What		
What	Catastrophe Code	This system code identifies a catastrophe. This is the number or other identifier assigned by the company.
What	Catastrophe State	This system code identifies the state where a catastrophe occurred.
What	Class ID	This system generated number identifies the class.
What	Currency Code	This system code identifies document currency.
What	Excess Catastrophe Code	This system code indicates that a catastrophe loss is in excess of a policyholders' retention.
What	Line of Business	A code used to represent the Line of Business.
What	Line of Business System Code	This system code represents a system line of business.
What	Monoline/Package	A code that tells if a policy is a monoline policy or is written as part of a package.
What	National Catastrophe Code	This system code identifies the national catastrophe occurrence.
What	Policy Age	The number of months in policy term.
What>Billing Account		
Billing Account	Billing Account Number	The number of the account in the billing system, if different than the policy system.
Billing Account	Method of Payment	The manner that the insured makes payments on billing account balance.

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Billing Account	Payment Plan	The payment schedule applied to a policy balance.
Billing Account	Payment Service	The Payment Service code identifies the type of billing plan used for the policy.
What>Class		
Class	Class Code	A class code is a three to six character field used to classify the general characteristics of an employees function. Used for rating.
Class	Class State	The state associated with the insured address.
Class	Primary Class Code	In a situation where the class code is split into more than one useful breakout, this is the primary portion.
Class	Secondary Class Code	In a situation where the class code is split into more than one useful breakout, this is the secondary portion.
What>Coverage		
Coverage	Annual Statement Line	A code that indicates in which line of the annual statement a transaction belongs.
Coverage	Bureau Report Plan	Indicates the statistical plan code used for bureau reporting.
Coverage	Coverage	This field reports a code based on the type of coverage afforded on the insurance line policy. The aggregate of risks covered by the terms of a contract of insurance.
Coverage	Coverage Category	A way to group coverages within a line of business.
Coverage	Coverage Effective Date	The calendar date when the policy coverage begins.
Coverage	Coverage Expiration Date	The calendar date when the policy coverage ends.
Coverage	Coverage Part	An indicator of a line of business within a package policy.
Coverage	Secondary Coverage	A client defined code to further breakdown the type of coverage afforded on the insurance line policy.
Coverage	Statistical Plan	This code identifies the statistical plan for coverage.
What>Deductible		

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Deductible	Deductible	The amount of loss that the policyholder is responsible to pay.
Deductible	Deductible Applies To	This code is used to identify to what the deductible applies.
Deductible	Deductible Basis	This code represents the basis applied to determine the deductible.
Deductible	Deductible Type	This code represents the deductible type that pertains to a particular policy coverage.
What>Distribution Channel		
Distribution Channel	Distribution Channel Name	The full name of the distribution channel.
Distribution Channel	Distribution Channel Number	The number or other identifier assigned to the distribution channel.
Distribution Channel	Distribution Channel Type	The classification of the activities of distribution channel.
Distribution Channel	Typical Commission Rate	The rate of commission given to a producer for a sale of a policy unless the commission rate is overridden.
What>Group Program		
Group Program	Group Program Anniversary Date	The calendar date that identifies the anniversary of a group program.
Group Program	Group Program Dividend Date	The calendar date that identifies the dividend date of a group program.
Group Program	Group Program Dividend Plan	The classification of the manner in which a group program dividend is paid.
Group Program	Group Program Member Count	This number identifies the group program.
Group Program	Group Program Name	The name of the program, other than state or national, that a group of policies are associated with.
Group Program	Group Program Natural Name	The name of the national program that a group of policies are associated with.
Group Program	Group Program Original Date	The calendar date that identifies group program Origination Date.
Group Program	Group Program State	The state associated with group program.
Group Program	Group Program Status	The description of the current condition of a program with which a group of policies is associated.

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Group Program	Group Program Type	The type of program that is represented.
What>Limit		
Limit	First Limit	The first limit of coverage for each type of coverage.
Limit	Full Limit	The limit associated with the coverage code.
Limit	Limit Applies To	A code identifying to what the limit applies.
Limit	Limit Basis	The code for basis to which the limit applies.
Limit	Limit Type	The code that describes a limit.
Limit	Second Limit	The second limit of coverage for each type of coverage.
Limit	Third Limit	The third limit of coverage for each type of coverage.
Limit	Valuation Code	This code reports the valuation of the limit of coverage for each type of coverage.
What>Line of Business		
Line of Business	Company Product Code	A company-unique code indicating the product classification of this policy. The source of this code list is the individual carriers.
Line of Business	Line of Business	A code used to represent the Line of Business.
Line of Business	Line of Business Sub Code	A further breakdown of Line of Business. May be defined by company.
Line of Business	Line of Business System Code	This system code represents a system line of business.
Line of Business	Personal or Commercial	A code used to identify a policy as personal or commercial lines.
What>Reinsurance Contract		
Reinsurance Contract	Reinsurance Contract Begin Date	The calendar date that identifies when reinsurance contract begins.
Reinsurance Contract	Reinsurance Contract Ceded Loss Ratio	The ratio of losses and loss adjustment expenses incurred to premiums earned for the portion of exposure that is transferred to a reinsurance company.
Reinsurance Contract	Reinsurance Contract Category	The category of the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Cession Number	The unique identifier of the reinsurance contract cession.

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Reinsurance Contract	Reinsurance Contract Certificate Number	The unique identifier assigned to the reinsurance contract certificate.
Reinsurance Contract	Reinsurance Contract End Date	The calendar date reinsurance contract ends.
Reinsurance Contract	Reinsurance Contract Facultative Commission Percent	The percentage commission paid to Reinsurer.
Reinsurance Contract	Reinsurance Contract Layer	The reinsurance contract layer describes the amount of reinsurance provided in the reinsurance contract.
Reinsurance Contract	Reinsurance Contract Treaty Number	A unique identifier assigned to a reinsurance contract treaty.
Reinsurance Contract	Reinsurance Contract Type	The contract type for reinsurance contract dimension.
When		
When	Calendar Month	The numeric representation of the month (1-12).
When	Calendar Month Name	The name of a month (Jan, Feb, etc.).
When	Calendar Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Calendar Quarter Name	The name of a quarter (Q1 - Q4).
When	Calendar Year	The one-year period that begins on January 1 and ends on December 31.
When	Fiscal Month	The numeric representation of the month (1-12).
When	Fiscal Month Name	The name of a month (Jan, Feb, etc.).
When	Fiscal Quarter	The numeric representation of a quarter consisting of the year and quarter name (i.e., "2007 Q1").
When	Fiscal Quarter Name	The name of a quarter (Q1 - Q4).
When	Fiscal Year	The year commencing with the effective date of the insurance policy or with an anniversary of that date.
Where		
Where	Insured City	The name of the city in the address.
Where	Insured Country	The country code in the address.
Where	Insured County	The county in the address.

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Where	Insured District	The geographical district where the insured is located.
Where	Insured Latitude	The latitude location of the insured's address.
Where	Insured Longitude	The longitude location of the insured's address.
Where	Insured Postal Code	The full postal zip code as defined by company specifications.
Where	Insured Postal Code Prefix	The first 3 digits of a 5 digit geopolitical zip code.
Where	Insured Postal Sub Code	The ending digits of Postal Code that identifies a smaller area of the total area served by a Postal Code.
Where	Insured Region	The geographical region where insured is located.
Where	Insured State	The state of the insured's location.
Where	Insured Territory	The territory of the insured's location.
Additional Filters>Policy Detail		
Policy Detail	Active or Cancelled	A code (A, C) indicating whether this policy is active or cancelled.
Policy Detail	Cancel Reason	The system code describes the reason for a cancellation.
Policy Detail	Exposure Basis	The denomination in which the exposure units are expressed.
Policy Detail	Monoline or Package	A code that tells if a policy is a monoline policy or is written as part of a package.
Policy Detail	New or Renewal	A code (N, R) indicating whether this policy is a new policy or a renewal policy.
Policy Detail	Original Inception Date	The original date a policyholder obtained coverage. This date remains constant regardless of subsequent renewals.
Policy Detail	Package Discount	The indicator that describes the presence or absence of a discount for packaging of insurance coverage.
Policy Detail	Package Discount Percent	The percentage of premium waived when Package Discount applies.
Policy Detail	Package Modification Assignment Code	This code indicates the package modification assignment.
Policy Detail	Package Modification Assignment Factor	The percentage of premium waived as a result of packaging coverages.

Table 24: Policy Transaction (Continued)

Category	Filter	Description
Policy Detail	Policy Age	The number of months in policy term.
Policy Detail	Policy Cancellation Date	The date a policy or coverage was terminated by cancellation.
Policy Detail	Policy Effective Date	The effective date of the policy related to this transaction.
Policy Detail	Policy Expiration Date	The expiration date of the policy related to this transaction.
Policy Detail	Policy Number	A unique client-assigned number identifying each policy.
Policy Detail	Policy Type	The description of the type of coverage included in a policy.
Policy Detail	Policy Type Category	The categorization of the type of coverage a policy includes.
Policy Detail	Policy Version	The number or other identifier used by the company to identify 'this' version of the policy.
Policy Detail	Policyholder Name	The name of the insured.
Policy Detail	Premium Basis	The basis to which rates are applied to determine premiums.
Policy Detail	Renewal Term	The length of the renewal policy period (term) in months.
Policy Detail	Supporting Business Discount Type	The percentage of premium waived when supporting business discount applies.
Policy Detail	Supporting Business Type	This value represents the type of supporting business for which the policyholder received a discount standard code.

Appendix B

Metrics

This appendix describes the standard metrics used in OII.

When setting-up requests on the Answers page, you will select data from two areas:

- **Metrics** – Metrics represent calculated values, including premiums, losses, exposures, ratios, averages and counts.
- **Filters** – Filters represent elements by which the metrics can be analyzed, such as by line of business, agency, program, adjuster, class code and postal code. Filters are organized in a who, what, when, where format to facilitate ease of navigation. See *Appendix A: Filters* for a complete listing of filters.

The following table lists the OII metrics and describes the function or explains the formula used. It also provides the value of each metric.

Table 25: Metric Definitions

Metrics	Description
Allocated Expense Reserve Change	Any change in the amount set aside to support expense payments directly attributable to an individual claim or feature, including the initial Loss Reserve established, during a specific time period.
Allocated Expense Reserve Change Ratio	Allocated Expense Reserve Change divided by Earned Premium
Average Alloc Expense Paid Per Claim	Paid Allocated Expense divided by Total Open Claims.
Average Cancellation Premium	Cancelled Premium Amount divided by Cancelled Policy Count
Average Combined Expenses Per Claim	(Paid Allocated Expense + Paid Unallocated Expense) divided by Total Open Claims
Average Effective Premium	Effective Premium Amount divided by Effective Policy Count
Average Expiration Premium	Expired Premium Amount divided by Expired Policy Count
Average Inforce Premium	Inforce Premium Amount divided by Inforce Policy Count
Average Retained Premium	Retained Premium Amount divided by Retained Policy Count

Table 25: Metric Definitions (Continued)

Metrics	Description
Average Transaction Size	Written Premium Amount divided by Written Premium Policy Count
Average Unalloc Expense Paid Per Claim	Paid Unallocated Expense divided by Total Open Claims
Average Written Premium	Written Premium Amount divided by Written Policy Count
Billing Hourly Rate	This number represents the charge applicable or each hour for a service associated with a claims transaction.
Cancelled Policy Count	<p>The number of policies that are cancelled at the end of a specified evaluation period and active at the end of the prior evaluation period.</p> <p>The formula for calculating the Cancelled Policy Count is as follows: CancellationDate >= BOMDate and CancellationDate < EOMDate</p>
Cancelled Premium	The final total written premium amount of policies that were cancelled at the end of a specified evaluation period and active at the end of the prior evaluation period.
Cancelled Premium to Written Premium	Cancelled Premium divided by Written Premium
Claim Feature Count	The number of distinct features with transactional activity within an evaluation period.
Claim Occurrence Count	The number of distinct claim occurrences with transactional activity within an evaluation period.
Claim Status Count	The number of Open, Closed, and Reopened claims within an evaluation period.
Claim to Date Incurred Amount	The total amount of Incurred Losses since the claim was opened.
Claim Transaction Amount	This number represents the actual amount of a claim transaction.
Claimant Count	The number of distinct claimants with transactional activity within an evaluation period.
Claims Closed	The number of claim occurrences closed within an evaluation period.
Claims Opened	The number of claim occurrences opened within an evaluation period.
Combined Expense Reserve Change	Allocated Expense Reserve Change + Unallocated Expense Reserve Change.

Table 25: Metric Definitions (Continued)

Metrics	Description
Combined Expense Reserve Change Ratio	(Allocated Expense Reserve Change + Unallocated Expense Reserve Change) divided by Earned Premium.
Combined Incurred Expense	Incurred Allocated Expense + Incurred Unallocated Expense.
Combined Incurred Expense Ratio	(Incurred Allocated Expense + Incurred Unallocated Expense) divided by Earned Premium.
Combined Incurred Expense to Incurred Loss Ratio	(Incurred Allocated Expense + Incurred Unallocated Expense) divided by Incurred Loss
Combined Incurred Loss and Recovery	Incurred Loss + Incurred Salvage + Incurred Subrogation + Incurred Deductible.
Combined Incurred Loss and Recovery Ratio	(Incurred Loss + Incurred Salvage + Incurred Subrogation + Incurred Deductible) divided by Earned Premium.
Combined Incurred Loss, Expense and Recovery	Incurred Loss + Paid Allocated Expense + Allocated Expense Reserve Change + Paid Unallocated Expense + Unallocated Expense Reserve Change + Salvage Recovered + Salvage Reserve Change + Subrogation Recovered + Subrogation Reserve Change + Deductible Recovered + Deductible Reserve Change
Combined Incurred Loss, Expense and Recovery Ratio	(Incurred Loss + Incurred Allocated Expense + Incurred Unallocated Expense + Incurred Salvage + Incurred Subrogation + Incurred Deductible) divided by Earned Premium.
Combined Incurred Recovery	Salvage Recovered + Salvage Reserve Change + Subrogation Recovered + Subrogation Reserve Change + Deductible Recovered + Deductible Reserve Change
Combined Incurred Recovery Ratio	(Incurred Salvage + Incurred Subrogation + Incurred Deductible) divided by Earned Premium.
Combined Incurred Recovery to Incurred Loss Ratio	(Incurred Salvage + Incurred Subrogation + Incurred Deductible) divided by Incurred Loss.
Combined Loss and Expense Incurred	Incurred Loss + Incurred Allocated Expense + Incurred Unallocated Expense.
Combined Loss and Expense Incurred Ratio	(Incurred Loss + Incurred Allocated Expense + Incurred Unallocated Expense) divided by Earned Premium.
Combined Loss and Expense Reserve Change	Loss Reserve Change + Allocated Expense Reserve Change + Unallocated Expense Reserve Change.
Combined Loss and Expense Reserve Change Ratio	(Loss Reserve Change + Allocated Expense Reserve Change + Unallocated Expense Reserve Change) divided by Earned Premium.
Combined Loss and Recovery Reserve Change	Loss Reserve Change + Salvage Reserve Change + Subrogation Reserve Change + Deductible Reserve Change.

Table 25: Metric Definitions (Continued)

Metrics	Description
Combined Loss and Recovery Reserve Change Ratio	(Loss Reserve Change + Salvage Reserve Change + Subrogation Reserve Change + Deductible Reserve Change) divided by Earned Premium.
Combined Loss, Expense and Recovery Reserve Change	Loss Reserve Change + Allocated Expense Reserve Change + Unallocated Expense Reserve Change + Salvage Reserve Change + Subrogation Reserve Change + Deductible Reserve Change.
Combined Loss, Expense and Recovery Reserve Change Ratio	(Loss Reserve Change + Allocated Expense Reserve Change + Unallocated Expense Reserve Change + Salvage Reserve Change + Subrogation Reserve Change + Deductible Reserve Change) divided by Earned Premium.
Combined Outstanding Expense Reserve	Outstanding Allocated Expense Reserve + Outstanding Unallocated Expense Reserve.
Combined Outstanding Loss and Expense Reserve	Outstanding Loss Reserve + Outstanding Allocated Expense Reserve + Outstanding Unallocated Expense Reserve.
Combined Outstanding Loss and Recovery Reserve	Outstanding Loss Reserve + Outstanding Salvage Reserve + Outstanding Subrogation Reserve + Outstanding Deductible Reserve.
Combined Outstanding Loss, Expense and Recovery Reserve	Outstanding Loss Reserve + Outstanding Allocated Expense Reserve + Outstanding Unallocated Expense Reserve + Outstanding Salvage Reserve + Outstanding Subrogation Reserve + Outstanding Deductible Reserve.
Combined Outstanding Recovery Reserve	Outstanding Salvage Reserve + Outstanding Subrogation Reserve + Outstanding Deductible Reserve.
Combined Paid Expense	Paid Allocated Expense + Paid Unallocated Expense
Combined Paid Expense Ratio	(Paid Allocated Expense + Paid Unallocated Expense) divided by Earned Premium.
Combined Paid Expense to Paid Loss Ratio	(Paid Allocated Expense + Paid Unallocated Expense) divided by Paid Loss
Combined Paid Loss and Expense	Paid Loss + Paid Allocated Expense + Paid Unallocated Expense
Combined Paid Loss and Expense Ratio	(Paid Loss + Paid Allocated Expense + Paid Unallocated Expense) divided by Earned Premium.
Combined Paid Loss and Recoveries	Paid Loss + Salvage Recovered + Subrogation Recovered + Deductible Recovered
Combined Paid Loss and Recovery Ratio	(Paid Loss + Salvage Recovered + Subrogation Recovered + Deductible Recovered) divided by Earned Premium.

Table 25: Metric Definitions (Continued)

Metrics	Description
Combined Paid Loss, Paid Expense and Recoveries	Paid Loss + Paid Allocated Expense + Paid Unallocated Expense + Salvage Recovered + Subrogation Recovered + Deductible Recovered
Combined Paid Loss, Paid Expense and Recovery Ratio	(Paid Loss + Paid Allocated Expense + Paid Unallocated Expense + Salvage Recovered + Subrogation Recovered + Deductible Recovered) divided by Earned Premium.
Combined Recovery Ratio	(Salvage Recovered + Subrogation Recovered + Deductible Recovered) divided by Earned Premium.
Combined Recovery Reserve Change	Salvage Reserve Change + Subrogation Reserve Change + Deductible Reserve Change.
Combined Recovery Reserve Change Ratio	(Salvage Reserve Change + Subrogation Reserve Change + Deductible Reserve Change) divided by Earned Premium.
Combined Recovery to Paid Loss Ratio	(Salvage Recovered + Subrogation Recovered + Deductible Recovered) divided by Paid Loss.
Commision Amount	That portion of premium that is retained or paid as an acquisition expense.
Commission	That portion of premium that is retained or paid as an acquisition expense.
Count Renewal Retention	Retained Policy Count divided by Expired Policy Count.
Deductible Recovered	The amount of compensation received from an entity that is fully or partially liable for repayment of a deductible amount that has been incurred.
Deductible Recovered to Paid Loss Ratio	Deductible Recovered divided by Paid Loss Ratio.
Deductible Recovery Ratio	Deductible Recovered divided by Earned Premium.
Deductible Reserve Change	Any change in the amount of compensation expected to be recovered from an entity that is fully or partially liable for repayment of a deductible amount that has been incurred, including the initial Loss Reserve established, during a specific time period.
Deductible Reserve Change Ratio	Deductible Reserve Change divided by Earned Premium.
Earned Composite Rate	Earned Premium divided by Earned Exposure.
Earned Exposure	The amount of Written Exposure that has been realized as of a specific time period. Unearned exposure is calculated on a daily (1/365th) method, based on client specifications. Earned Exposure = Written Exposure - Unearned Exposure.

Table 25: Metric Definitions (Continued)

Metrics	Description
Earned Premium	The amount of written premium that has been realized as of a specific time period. Unearned premium is calculated on either a daily (1/365 th) or a monthly (1/24 th) method, based on client specifications. Earned Premium = Written Premium - Unearned Premium.
Earned Premium to Written Premium	Earned Premium divided by Written Premium.
Effective Policy Count	The number of policies with an effective date within an evaluation period, and in an ending active status in that period. Effective Policy Count is calculated as: EffectiveDate >= BOMDate and EffectiveDate < EOMDate and (CancellationDate >= EOMDate or CancellationDate < EffectiveDate)
Effective Premium	The total written premium amount of policies with an effective date within a specified evaluation period, calculated on a policy term basis using the Policy Effective Date.
Expense/Paid Losses	Paid Allocated Expense divided by Paid Loss
Expenses/Incurred Amount	(Paid Allocated Adjustment Expense + Outstanding Loss Reserve) divided by Incurred Loss.
Expenses/Incurred Including Expenses	(Paid Allocated Adjustment Expense + Outstanding Loss Reserve) divided by (Incurred Loss + Incurred Allocated Expense).
Expired Policy Count	The number of policies with an expiration date within an evaluation period, and in an ending active status in that period. Expired Policy Count is calculated as: ExpirationDate >= BOMDate and ExpirationDate < EOMDate and CancellationDate < EffectiveDate
Expired Premium	The total written premium amount of policies with an expiration date within a specified evaluation period, calculated on a policy term basis using the Policy Expiration Date.
Future Written Premium	The amount of coverage-level transactions that have a Cycle (processing) Date in a specified evaluation period, but a Book Date in a future evaluation period.
Incurred Allocated Expense	The full amount of expenses directly attributable to an individual claim, based on both amounts paid and reserves for estimated future payments, during a specific time period.
Incurred Allocated Expense Ratio	Incurred Allocated Expense divided by Earned Premium.
Incurred Allocated Expense to Incurred Loss Ratio	Incurred Allocated Expense divided by Incurred Loss.

Table 25: Metric Definitions (Continued)

Metrics	Description
Incurred Combined Expense to Incurred Loss Ratio	(Incurred Allocated Expense + Incurred Unallocated Expense) divided by Incurred Loss.
Incurred Deductible	The full amount of compensation expected to be recovered from an entity that is fully or partially liable for repayment of a deductible amount that has been incurred, based on both amounts recovered and reserves for estimated future recoveries, during a specific time period.
Incurred Deductible Ratio	Incurred Deductible divided by Earned Premium.
Incurred Deductible to Incurred Loss Ratio	Incurred Deductible divided by Incurred Loss.
Incurred Loss	<p>The full amount of a claim based on both amounts paid and recovered and reserves for estimated future payments and recoveries. Can be one of 3 methods based on client specifications:</p> <ul style="list-style-type: none"> • Paid Losses + Loss Reserve Change • Paid Losses + Loss Reserve Change + Salvage Recovered + Salvage Reserve Change + Subrogation Recovered + Subrogation Reserve Change. • Paid Losses + Loss Reserve Change + Salvage Recovered + Salvage Reserve Change + Subrogation Recovered + Subrogation Reserve Change + Deductible Recovered + Deductible Reserve Change.
Incurred Loss and Combined Expense to Earned Exposures	(Incurred Loss + Incurred Allocated Expense + Incurred Unallocated Expense) divided by Earned Exposures.
Incurred Loss Ratio	Incurred Loss divided by Earned Premium.
Incurred Salvage	The full amount expected to be recovered for the value of property taken over by an insurer to reduce its loss, based on both amounts recovered and reserves for estimated future recoveries, during a specific time period.
Incurred Salvage Ratio	Incurred Salvage divided by Earned Premium.
Incurred Salvage to Incurred Loss Ratio	Incurred Salvage divided by Incurred Loss.
Incurred Subrogation	The full amount of compensation expected to be recovered from an entity that is fully or partially liable for a claim that has been incurred, based on both amounts recovered and reserves for estimated future recoveries, during a specific time period.
Incurred Subrogation Ratio	Incurred Subrogation divided by Earned Premium.
Incurred Subrogation to Incurred Loss Ratio	Incurred Subrogation divided by Incurred Loss.

Table 25: Metric Definitions (Continued)

Metrics	Description
Incurred Unallocated Expense	Paid Unallocated Expense + Unallocated Expense Reserve Change
Incurred Unallocated Expense Ratio	Incurred Unallocated Expense divided by Earned Premium.
Incurred Unallocated Expense to Incurred Loss Ratio	Incurred Unallocated Expense divided by Incurred Loss.
Inforce Policy Count	<p>The number of policies with an expiration date greater than the end of an evaluation period, an effective date in or prior to that evaluation period, and an ending active status within that period.</p> <p>Inforce Policy Count is calculated as:</p> <p>ExpirationDate >= EOMDate and EffectiveDate < EOMDate and (CancellationDate >= EOMDate or CancellationDate < EffectiveDate)</p>
Inforce Premium	The total written premium amount of policies that are active at the end of a specified evaluation period, have an effective date within or prior to the evaluation period, and an expiration date in a future evaluation period.
Inforce Premium to Written Premium	Inforce Premium divided by Written Premium.
Loss Reserve Change	Any change in the amounts set aside to support payment of a claim, including the initial Loss Reserve established, during a specific time period.
Loss Reserve Change Ratio	Loss Reserve Change divided by Earned Premium.
Loss Severity	Incurred Amount divided by Total Claim Open Count.
Number of Billed Hours	This number represents the count of hours billed to a claims transaction.
Original Premium Amount	This number represents the original premium in the term of coverage.
Outstanding Allocated Expense Reserve	The Allocated Expense reserve amount as of the end of a reporting period.
Outstanding Deductible Reserve	The deductible reserve amount as of the end of a reporting period.
Outstanding Loss Reserve	The loss reserve amount as of the end of a reporting period.
Outstanding Recovery Reserve	The recovery reserve amount at the end of a reporting period.
Outstanding Salvage Reserve	The salvage reserve amount as of the end of a reporting period.

Table 25: Metric Definitions (Continued)

Metrics	Description
Outstanding Subrogation Reserve	The subrogation reserve amount as of the end of a reporting period.
Outstanding Unallocated Expense Reserve	The Unallocated Expense reserve amount as of the end of a reporting period.
Paid Allocated Expense	The amount of expense payments directly attributable to an individual claim during a specific time period.
Paid Allocated Expense Ratio	Paid Allocated Expense divided by Earned Premium.
Paid Allocated Expense to Paid Loss Ratio	Paid Allocated Expense divided by Paid Loss.
Paid Loss	The amount of loss payments made (usually excluding all recoveries) during a specific time period.
Paid Loss Ratio	Paid Loss divided by Earned Premium.
Paid Unallocated Expense	The amount of expense payments not directly attributable to an individual claim, but assigned to a transaction based on client specifications, within a specific time period.
Paid Unallocated Expense Ratio	Paid Unallocated Expense divided by Earned Premium.
Paid Unallocated Expense to Paid Loss Ratio	Paid Unallocated Expense divided by Paid Loss.
Policy Count	Number of policies grouped by active or cancelled status at the end of an evaluation period.
Policy Transaction Amount	This number represents the amount of any transaction processed for a policy.
Premium Renewal Retention	Retained Premium divided by Expired Premium.
Previous Month Average Inforce Premium	The total average inforce premium for the previous month.
Previous Month Average Written Premium	The total average written premium for a previous month.
Previous Month Cancelled Policy Count	The total number of policies cancelled during the previous month.
Previous Month Cancelled Premium	The amount of premiums cancelled during the previous month.
Previous Month Claim Occurrence Count	The number of claim occurrences during the previous month.

Table 25: Metric Definitions (Continued)

Metrics	Description
Previous Month Claims Closed Count	The total number of claims closed during the previous month.
Previous Month Earned Premium	The total amount of earned premiums realized during the previous month.
Previous Month Effective Policy Count	The number of policies during the previous month of an evaluation period with an effective date within that evaluation period, and in an ending active status in that period.
Previous Month Expired Policy Count	The number of policies with an expiration date within an evaluation period, and in an ending active status in that period during the previous month.
Previous Month In Force Premium	The total amount of inforce premiums during the previous month.
Previous Month Incurred Loss Ratio	The total Incurred Loss Ratio realized during the previous month.
Previous Month Paid Loss Ratio	The total paid loss ratio for the previous month.
Previous Month Retained Policy Count	The number of retained policies during the previous month.
Previous Month Writtten Premium	The total amount of written premiums realized during the previous month.
Previous Quarter Average Inforce Premium	The total average inforce premium for the previous quarter.
Previous Quarter Average Written Premium	The total average written premium for a previous quarter.
Previous Quarter Cancelled Policy Count	The total number of policies cancelled during the previous quarter.
Previous Quarter Cancelled Premium	The amount of premiums cancelled during the previous quarter.
Previous Quarter Claim Occurance Count	The number of claim occurrences during the previous quarter.

Table 25: Metric Definitions (Continued)

Metrics	Description
Previous Quarter Claims Closed Count	The total number of claims closed during the previous quarter.
Previous Quarter Earned Premium	The total amount of earned premiums realized during the previous quarter.
Previous Quarter Effective Policy Count	The number of policies during the previous quarter of an evaluation period with an effective date within that evaluation period, and in an ending active status in that period.
Previous Quarter Expired Policy Count	The number of expired policies during the previous quarter.
Previous Quarter In Force Premium	The total amount of inforce premiums during the previous quarter.
Previous Quarter Incurred Loss Ratio	The total Incurred Loss Ratio realized during the previous quarter.
Previous Quarter Paid Loss Ratio	The amount of Paid Loss Ratio incurred during the previous quarter.
Previous Quarter Retained Policy Count	The number of retained policies during the previous quarter.
Previous Quarter Writtten Premium	The total amount of written premiums realized during the previous quarter.
Previous Year Average Inforce Premium	The total average inforce premium for the previous year.
Previous Year Average Written Premium	The total average written premium for the previous year.
Previous Year Cancelled Policy Count	The number of policies that were cancelled at the end of a specified evaluation period and active at the end of the prior evaluation period during the previous year.
Previous Year Cancelled Premium	The final total written premium amount of policies cancelled during the previous year of a specified evaluation period.
Previous Year Claimant Count	The number of claimants realized during the previous year of an evaluation period.
Previous Year Claims Closed Count	The total number of claims closed during the previous year.

Table 25: Metric Definitions (Continued)

Metrics	Description
Previous Year Claims Occurrence Count	The number of claim occurrences with transactional activity during the previous year of a specified evaluation period.
Previous Year Earned Premium	The amount of written premium that has been realized during the previous year of a specified time period.
Previous Year Effective Policy Count	The number of policies during the previous year of an evaluation period with an effective date within that evaluation period, and in an ending active status in that period.
Previous Year Expired Policy Count	The number of policies with an expiration date within an evaluation period, and in an ending active status in that period during the previous year.
Previous Year Incurred Loss	The total amount of incurred losses for the previous year.
Previous Year Incurred Loss Ratio	Incurred Loss Ratio for the previous year.
Previous Year Inforce Policy Count	The Inforce Policy Count for the previous year.
Previous Year Inforce Premium	The total amount of inforce premiums during the previous year.
Previous Year Paid Loss	The amount of loss payments made (usually excluding all recoveries) during the previous year.
Previous Year Paid Loss Ratio	The amount of Paid Loss Ratio incurred during the previous month.
Previous Year Retained Policy Count	The number of policies with an expiration date and an ending active status within an evaluation period, and an effective date and an ending active status within that period during the previous year.
Previous Year Written Policy Count	The number of policies containing written premium within an evaluation period during the previous year.
Previous Year Written Premium	The amounts charged to policyholders for insurance coverage during the previous year.
Processed Premium	The amount of coverage-level transactions that have a Cycle (processing) Date in a specified evaluation period.
Recoveries/Paid Losses	Recoveries divided by Paid Loss.

Table 25: Metric Definitions (Continued)

Metrics	Description
Retained Policy Count	<p>The number of policies with an expiration date and an ending active status within an evaluation period, and an effective date and an ending active status within that period.</p> <p>Retained Policy Count is calculated as: (ExpirationDate >= BOMDate and ExpirationDate < EOMDate and CancellationDate < EffectiveDate) AND (EffectiveDate >= BOMDate and EffectiveDate < EOMDate and (CancellationDate >= EOMDate or CancellationDate < EffectiveDate))</p>
Retained Premium	The total written premium amount of inforce policies with an expiration and effective date within a specified evaluation period, calculated on a policy term basis using the Policy Expiration Date.
Retained Premium to Effective Premium	Retained Premium divided by Effective Premium.
Salvage Recovered	The value of property taken over by an insurer to reduce its loss.
Salvage Recovered to Paid Loss Ratio	Salvage Recovered divided by Paid Loss
Salvage Recovery Ratio	Salvage Recovered divided by Earned Premium.
Salvage Reserve Change	Any change in the amounts expected to be recovered for the value of property taken over by an insurer to reduce its loss, including the initial Loss Reserve established, during a specific time period.
Salvage Reserve Change Ratio	Salvage Reserve Change divided by Earned Premium.
Subrogation Recovered	The amount of compensation received from an entity that is fully or partially liable for a claim that has been incurred.
Subrogation Recovered to Paid Loss	Subrogation Recovered divided by Paid Loss.
Subrogation Recovery Ratio	Subrogation Recovered divided by Earned Premium.
Subrogation Reserve Change	Any change in the amounts of compensation expected to be recovered from an entity that is fully or partially liable for a claim that has been incurred, including the initial Loss Reserve established, during a specific time period.
Subrogation Reserve Change Ratio	Subrogation Reserve Change divided by Earned Premium.
Total Open Claims	The number of claim occurrences remaining open at the end of an evaluation period.
Transactional Paid Loss	The amount of loss payments made (usually excluding all recoveries) during a specific time period.

Table 25: Metric Definitions (Continued)

Metrics	Description
Unallocated Expense Reserve Change	Any change in the amount set aside to support expense payments not directly attributable to an individual claim or feature, but assigned to a transaction based on client specifications, including the initial Loss Reserve established, during a specific time period.
Unallocated Expense Reserve Change Ratio	Unallocated Expense Reserve Change divided by Earned Premium.
Written Exposure	The measure of the unit of risk assumed by an insurer, expressed as specified by the client, but usually based on individual units such as vehicles, structures, payroll, etc.
Written Policy Count	The number of policies with an expiration date and an ending active status within an evaluation period, and an effective date and an ending active status within that period.
Written Premium	The amounts charged to policyholders for insurance coverage. Calculation is based on the aggregation of all coverage-level transactions based on the Book Date (the accounting date when transactions are recognized).

Appendix C

Glossary

This glossary defines the terms and abbreviations commonly used within OII and formulas for counts, ratios, and averages.

Table 26: Glossary of Terms

Field	Definition/Formula
Accident Losses	“When” filter available in the Claim Detail application. Measures all losses based on the actual loss date and accumulates losses to the valuation (‘as of’) date.
Accident Month Case Incurred Loss	Measures Incurred Loss occurring within a given month on an accident year basis. Formula is Paid Loss (minus paid recoveries) + loss reserve amounts (both changes in reserves and initial reserves).
Accident Month Loss Severity	The average amount of loss per claim occurrence on an accident year/quarter/month basis. The formula is: accident year case incurred loss amount ÷ accident year number of losses (claim occurrences)
Accident Year Number of Losses	A count of all claim occurrences (not features) on an accident year basis.
Allocated Expense Loss Ratio	Allocated Loss Adjustment Expenses ÷ Loss Adjustment Expense Amounts
Allocated Expense Paid to Paid Loss Ratio	Allocated LAE Amount ÷ Paid Loss Amount
Allocated Expense Ratio	All Allocated Loss Adjustment Expenses ÷ All Loss Adjustment Expense Amounts (Allocated and Unallocated)
Allocated Expense Reserves to All Reserves	Allocated Loss Expense Reserves (both changes in reserves and initial reserves) ÷ All Loss Reserves (Allocated + Unallocated)
Allocated Expense/Incurred Ratio	All Allocated Loss Adjustment Expenses ÷ Incurred Losses excluding Expenses
Allocated Loss Adjustment Expense	The amount of change to loss adjustment expenses that can be directly tied to a given claim occurrence or feature and analyzed within a given time period.

Table 26: Glossary of Terms (Continued)

Field	Definition/Formula
Average Allocated Expense Paid Per Claim	$\text{Allocated Expenses} \div \text{Total Claim Occurrence Count}$
Average Loss Severity	$\text{Incurred Losses} \div \text{Total Open Claim Count}$
Average Policy Size	$\text{Written Premium} \div \text{Total policy count}$
Book Date	Used to calculate Written Premium, Losses, Reserves, Expenses and Recoveries on a Calendar Year basis. Book Date is defined as the accounting month in which premiums and losses are recognized. Book Date is not displayed in the applications, but is used to calculate various metrics in the background.
Calendar Year Earned Exposure	The amount of written exposure that may be recognized as earned for a given time period on a calendar year/quarter/month basis. Exposures are earned using the daily method. For each day a one-year policy is in force, an insurer earns 1/365th of the annual premium.
Calendar/Accident Case Incurred Loss Ratio	The relationship between incurred loss amounts and earned premium expressed as a percentage on an accident year/quarter/month basis. The formula is: $\text{accident year case incurred loss amount} \div \text{calendar year earned premium}$
Claim Counts	A metric in the Claims Monitor application that counts the number of claim occurrences reported within a user-defined date range. The analysis results are compared between to evaluation dates (ex: as of January 2006 vs. as of July 2006) to measure loss development over time
Claim Reported Losses	“When” filter available in the Claim Detail application. Measures all losses based on the date the loss was actually reported to the insured and accumulates losses to the valuation (“as of”) date.
Claim Status	Available in the Claim Detail application Claim Status provides results for Open, Closed and Reopened claims as of the evaluation period.
Conformed Dimension	A common dimension (filter) that is shared across multiple data marts and applications, (i.e., Company, Branch, Agent, etc.)
Current Incurred Amount	Current total value of the claim, less any expenses.
Cycle Date	The date when data was entered or modified in the source system and is used as the Valuation Date in the OII applications. Cycle Date is not displayed in the applications, but is used to calculate various metrics in the background.

Table 26: Glossary of Terms (Continued)

Field	Definition/Formula
Dimension	An attribute or characteristic that can be used to categorize or filter data.
Drill Down	An analysis technique that filters a particular data attribute down to a lower level (ex: Written Premium by Broker).
Drill Up	The reverse of a Drill Down that returns the user to a higher-level of analysis.
Executive Summary	A compilation of information deemed important to an executive.
Exposure Basis Code	The exposure basis is the extent of risk as measured by various metrics depending on the coverage being exposed.
Exposure Earned Premium Fact or Metric	The earned premium that is actually exposed to loss during a specified period of time. To develop this earned premium, the date on which premiums were booked is disregarded. The portion of the written premium exposed to loss (earned) is allocated to the exposure period whether the premiums were booked in a prior period, during the current period, or after the period. The exposure earned premium eliminates the deficiency contained in accounting earned premium that results from timing problems in the recording of the premium.
Facultative Commission Percent	The percentage of premium the ceding company retains as a commission from the reinsurer.
Floor	The lowest dollar amount you want considered for analysis.
Incurred Loss Including LAE	The estimated value of the total loss for the selected time period including loss expenses. The formula is calculated as: Incurred Loss including LAE = Paid Loss + Loss Reserves + Paid Combined Expenses – Paid Recoveries
Loss Frequency by Earned Exposure	The number of claims ÷ the number of earned exposures (ex: number of claim occurrences per hundred car years for collision coverage).
Loss Reserve Accuracy By Claim Count	Measures Incurred Loss change between two evaluation periods for all claims reported within a specified time period. The purpose is to analyze the number of claims where Incurred Loss increases or decreases between the two evaluation periods.
Loss Reserve Accuracy By Dollar Amount	Measures Incurred Loss change between two evaluation periods for all claims reported within a specified time period. The purpose is to analyze the change in Incurred Loss between the two evaluation periods.
Loss State / Province	The State or Province in which the claim actually occurred.

Table 26: Glossary of Terms (Continued)

Field	Definition/Formula
Mart	A set of "Query Ready" tables designed to support specific analytical requirements. Data marts contain fact (metric) and dimension (filter) tables and are segmented by application and by line of business.
Paid Combined Expenses	Allocated LAE Amount + Unallocated LAE Amount over a given time period.
Policy Transaction Amount	The amount of any transaction processed for a policy. All policy amounts in the applications (premiums, exposures, etc.) are an aggregation of individual policy transaction amounts.
Recoveries	Salvage Recovered + Subrogation Recovered
Recoveries to Incurred Including LAE Ratio	$(\text{Salvage Recovered} + \text{Subrogation Recovered}) \div (\text{Incurred Loss} + \text{Total Loss Adjustment Expense [ALAE + ULAE]})$
Recoveries to Incurred Ratio	$(\text{Salvage Recovered} + \text{Subrogation Recovered}) \div \text{Incurred Loss not including Expenses}$
Reserve Loss Ratio	$\text{Loss Reserve Amount} \div \text{Earned Premium Amount for a given evaluation period}$
Salvage	The value of property taken over by an insurer to reduce its loss.
Salvage Reserve Amount	The estimated value of property taken over by an insurer to reduce its loss. Salvage Reserve includes both Initial Salvage Reserves and Change in Salvage Reserves within the evaluation period.
State / Province	Defined as the <i>Governing</i> State or Province where the policy was written.
Subrogation	The amount of recovery that the insurance company has collected.
Subrogation Reserve Amount	The estimated amount of recovery the insurance company will collect. Subrogation Reserve includes both Initial Subrogation Reserves and Change in Subrogation Reserves within the evaluation period.
Suit State/Province	The state or province in which the litigation has been filed. This can be different from the policyholder's state/province or exposure state/province.
Unallocated Expense Reserves to All Reserves	$\text{Unallocated Reserves} \div (\text{Allocated Reserves} + \text{Unallocated Reserves})$
Unallocated Expenses Paid to Paid Loss	$(\text{Initial Unallocated Expenses} + \text{Change in Allocated Expenses}) \div \text{Paid Loss}$

Table 26: Glossary of Terms (Continued)

Field	Definition/Formula
Valuation Date	The date from which data is evaluated. An “as of” date. Example: Incurred Losses for 2005 - 2006 valued as of 12/31/2006. The valuation date is 12/31/2006.
Valuation Period	A point in time from which data is evaluated. An “as of” date. Example: Incurred Losses for 2005 - 2006 valued as of 12/31/2006. The valuation period is 12 months.

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