ORACLE
INSURANCE

Oracle Insurance Insight

Oracle Insurance Insight User Guide

version 7.0.2

Part number: E24031-01

October 2011

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Preface

Welcome to the *OII User Guide Version 7.0.2*. This manual provides detailed instructions for using Oracle Insurance Insight (OII) 7.0.2 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 7.0.2.

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* - This document describes the latest enhancements and updates to OII as well as issues that have been resolved in this version.
- *Oracle Insurance Insight Installation Guide* - This manual describes the steps for configuring and installing OII.
- *Oracle Insurance Insight Administration Guide* - This manual describes how to create and configure the required OII users and groups within OBIEE.
- *Oracle Insurance Insight Warehouse Palette User Guide* - This manual describes how to use the Warehouse Palette, an application that provides users with an easy-to-use interface to create and configure a Line of Business (LOB) and "publish" the LOB for incorporation into the OII system.
- *Oracle Insurance Insight Implementation Guide* - This manual describes the concepts and steps involved in implementing the OII system.
- *Oracle Insurance Insight Data Dictionary* - The data dictionary for the OII system.

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 thought 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:

User's Guide for Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1)

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/technetwork/middleware/bi-enterprise-edition/documentation/index.html

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 7.0.2?

New OBIEE 11g User Interface

OII 7.0.2 has upgraded from OBIEE 10g to OBIEE 11g. This change has resulted in a redesigned user interface. This manual describes these changes as they apply to specific OII components. For a complete list and description of the changes to the OBIEE interface, refer to the *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition, 11g Release 1(11.1.1)*.

New Layout of Scorecard Results

The results for each Line of Business (LOB) and Corporate Scorecard results has changed in OII 7.0.2. The ability to drill down on a year or quarter in a table or graph of a LOB Scorecard report has been removed. The results in a table now show each year, quarter, and month fully expanded with totals for each level. The graph depicts results by month.

All time periods have been removed from the Corporate Scorecards results. Only groups by LOB is shown. Also, the graph has been removed from Corporate Scorecards.

ACCESSING OBIEE

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

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

Note In the above URL:

- **<hostname>** - is the server name or IP address where you installed OBIEE
- **<port>** - is the port assigned to OBIEE. The default port will be different depending on whether or not you selected a "Simple" or "Enterprise" Install for OBIEE.
  - **Simple Install** - the default port is 7001.
  - **Enterprise Install** - the default port is 9704 but the user has the option to specify ports during the installation.

---

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

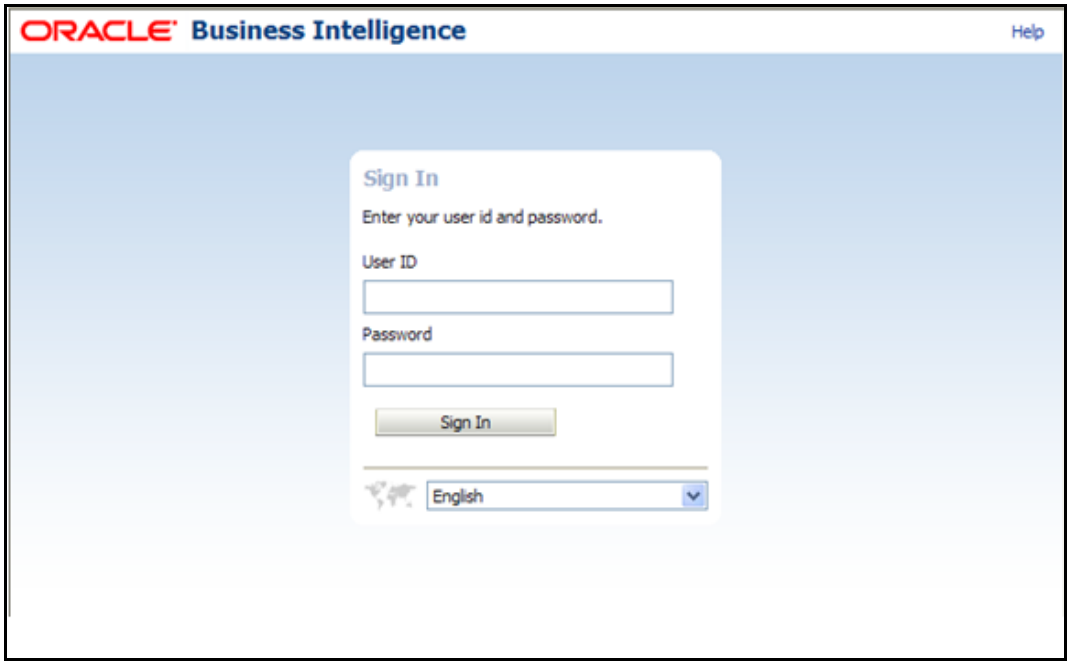


Figure 1: Oracle Business Intelligence Login Screen

3. Type in your User ID and Password.
4. Select the **Log In** button.

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

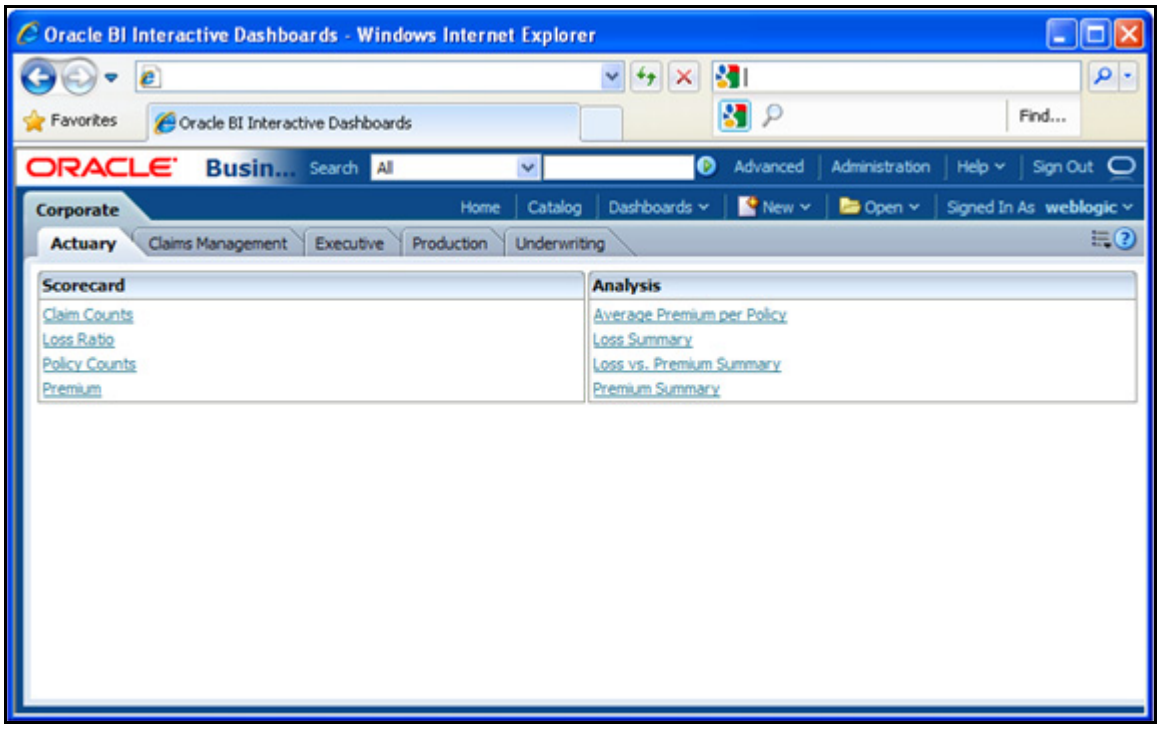


Figure 2: OII Landing Page

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 9.

USER INTERFACE

OII uses Oracle Business Intelligence Enterprise Edition (OBIEE) 11g 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.

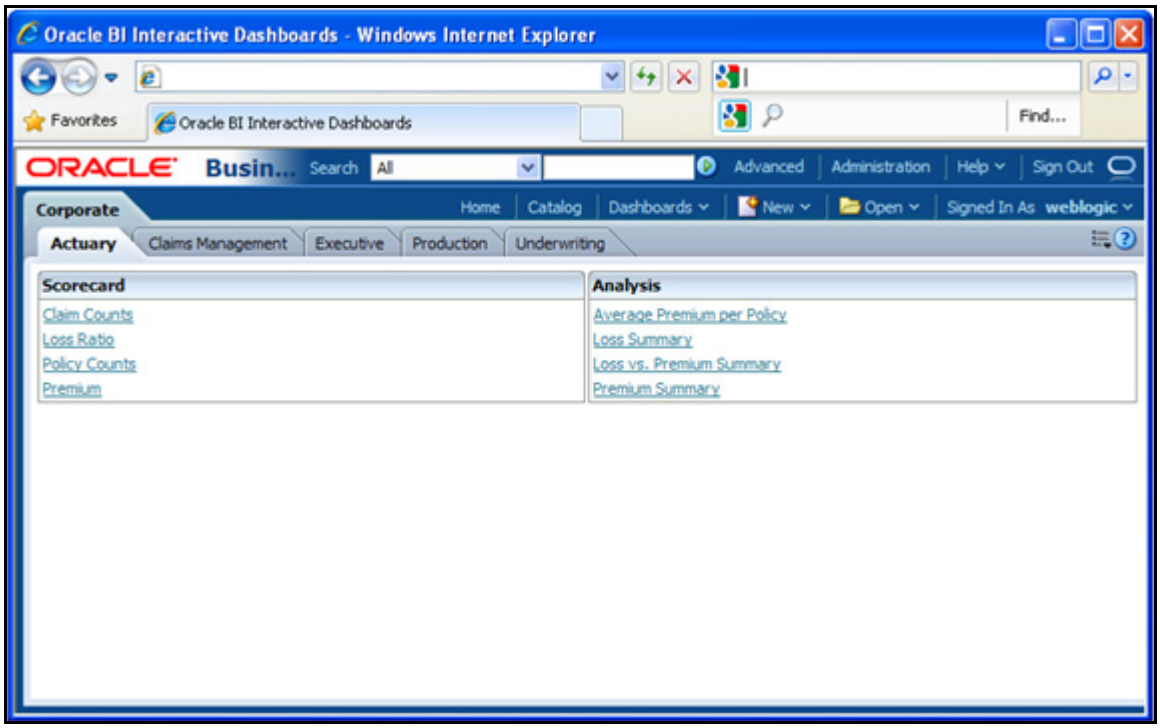


Figure 3: OII Landing Page

The OII interface is comprised of four main application components.

- Scorecard dashboard
- Analysis dashboard
- Reports dashboard
- Analysis 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

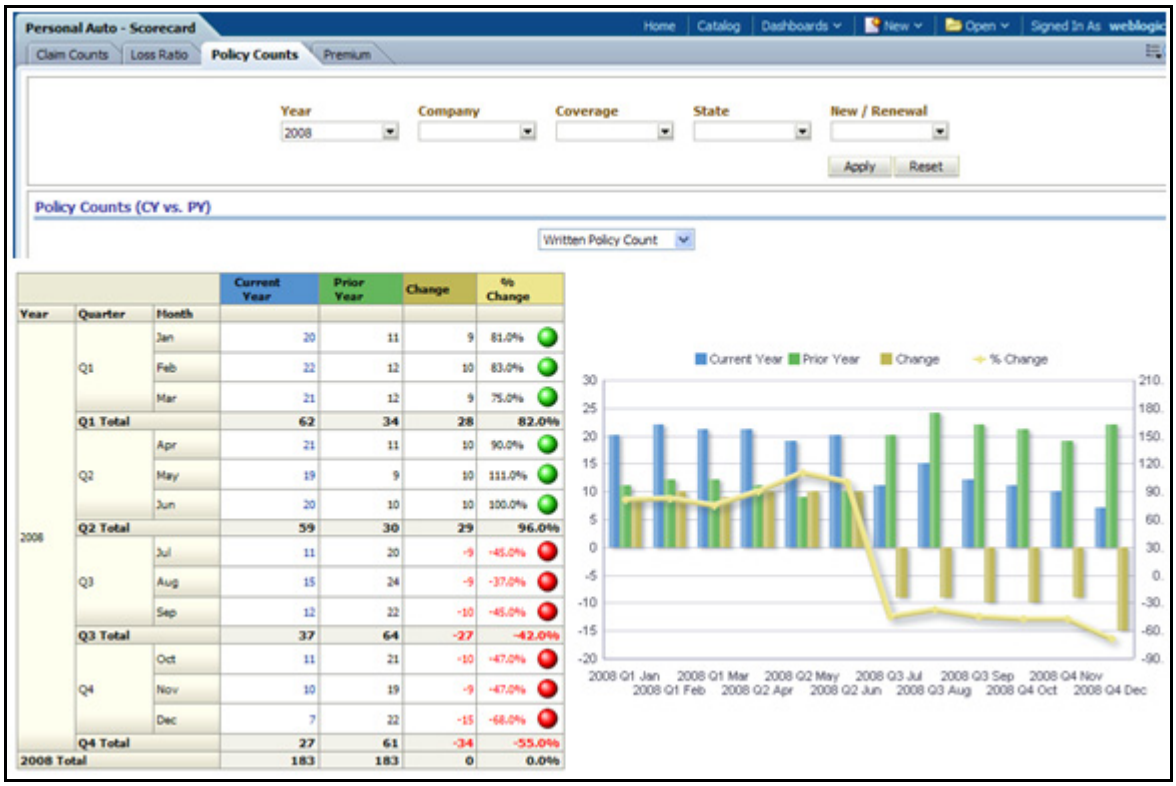
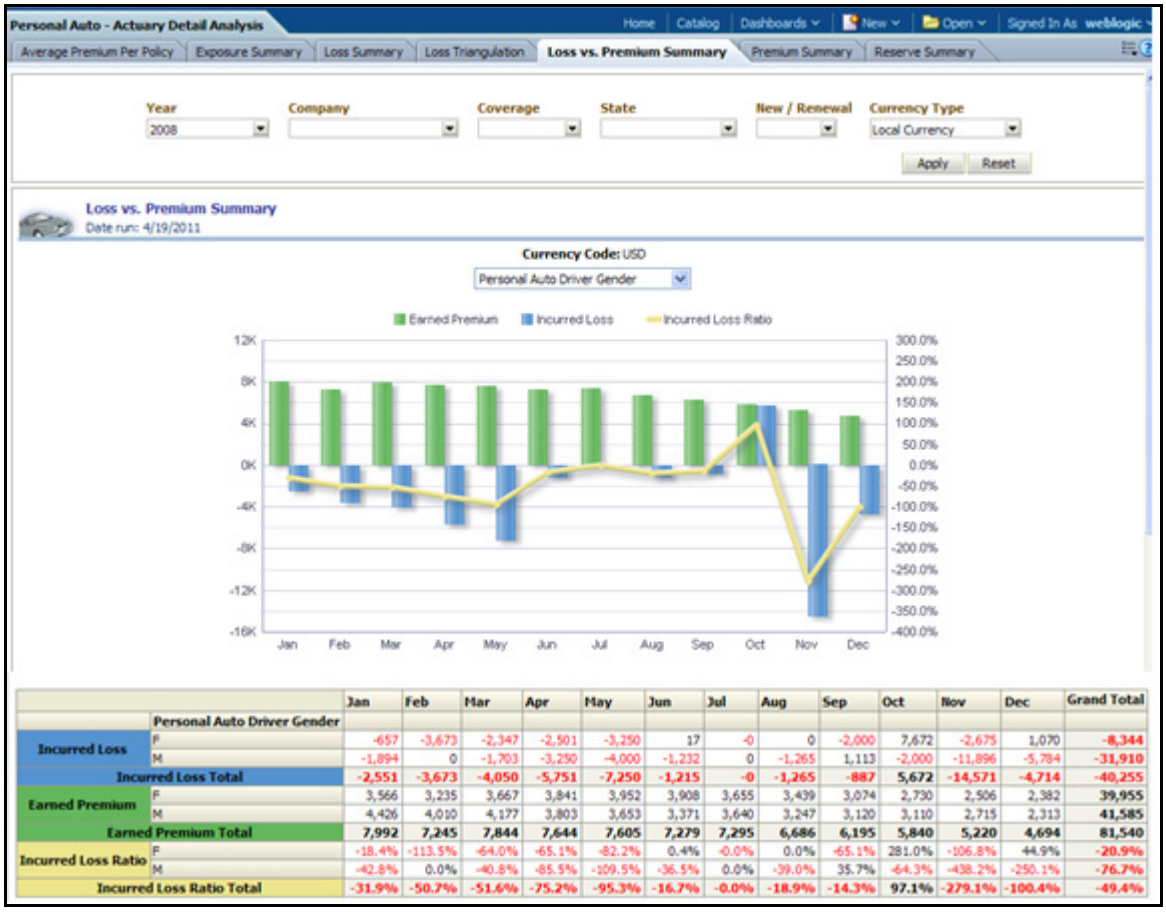


Figure 4: Scorecard - Policy Counts Analysis

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).



	Personal Auto Driver Gender	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
Incurred Loss	F	-657	-3,673	-2,347	-2,501	-3,250	17	-0	0	-2,000	7,672	-2,675	1,070	-8,344
	M	-1,894	0	-1,703	-3,250	-4,000	-1,232	0	-1,265	1,113	-2,000	-11,896	-5,784	-31,910
Incurred Loss Total		-2,551	-3,673	-4,050	-5,751	-7,250	-1,215	-0	-1,265	-887	5,672	-14,571	-4,714	-40,255
Earned Premium	F	3,566	3,235	3,667	3,841	3,952	3,908	3,655	3,439	3,074	2,730	2,506	2,382	39,955
	M	4,426	4,010	4,177	3,803	3,653	3,371	3,640	3,247	3,120	3,110	2,715	2,313	41,585
Earned Premium Total		7,992	7,245	7,844	7,644	7,605	7,279	7,295	6,686	6,195	5,840	5,220	4,694	81,540
Incurred Loss Ratio	F	-18.4%	-113.5%	-64.0%	-65.1%	-82.2%	0.4%	-0.0%	0.0%	-65.1%	281.0%	-106.8%	44.9%	-20.9%
	M	-42.8%	0.0%	-40.8%	-85.5%	-109.5%	-36.5%	0.0%	-39.0%	35.7%	-64.3%	-438.2%	-250.1%	-76.7%
Incurred Loss Ratio Total		-31.9%	-50.7%	-51.6%	-75.2%	-95.3%	-16.7%	-0.0%	-18.9%	-14.3%	97.1%	-279.1%	-100.4%	-49.4%

Figure 5: 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 tables and graphs.
- Reports allow users to drill down on certain areas in a table and/or graph 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.

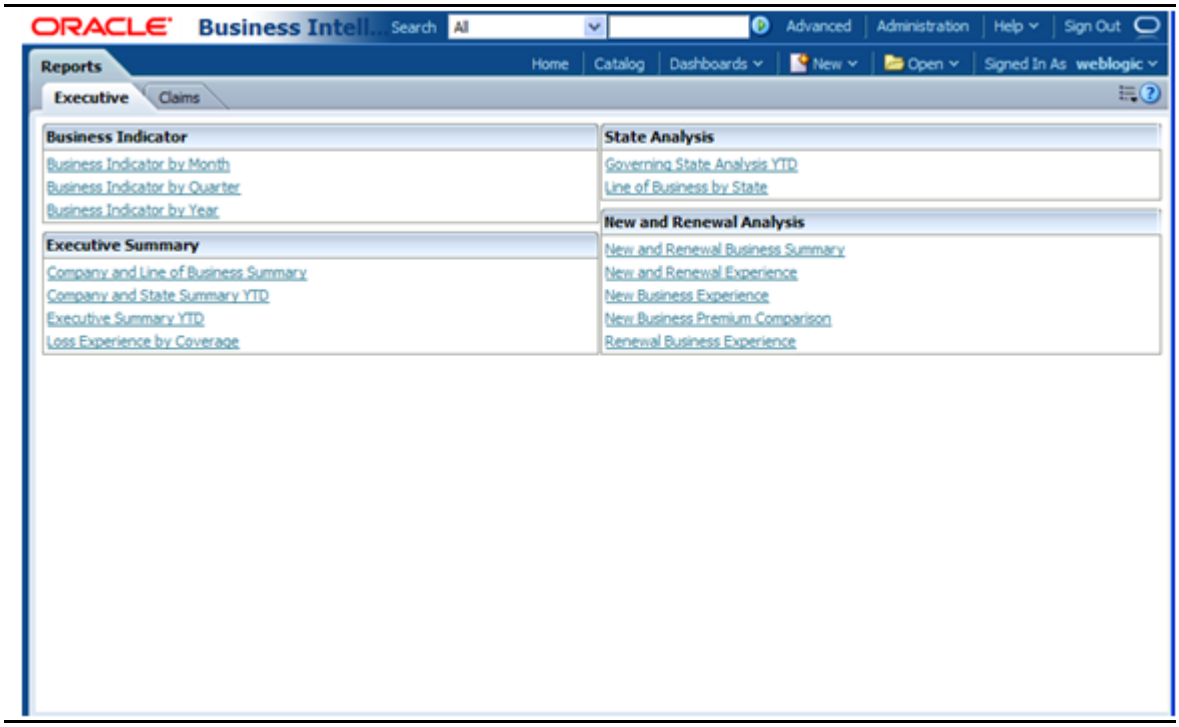


Figure 6: Reports Dashboard

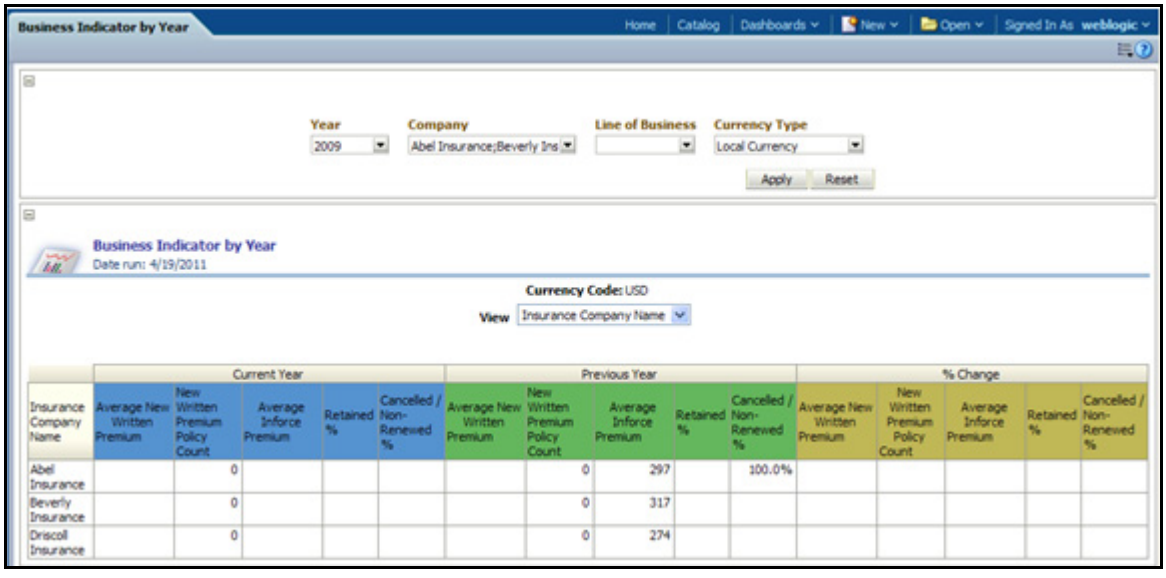


Figure 7: Sample Business Indicator by Year Report

ANSWERS

Answers is an ad-hoc query tool that allows users to build queries and reports, also called analyses, using data elements from OII.

Important In OBIEE 11g, Answers is also referred to as **Analyses**.

When setting-up analyses in the **Analysis Editor**, 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 contact 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 analyses and use the Answer's formatting features to customize the look and feel of the results. Results can appear in various styles such as graphs, 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.

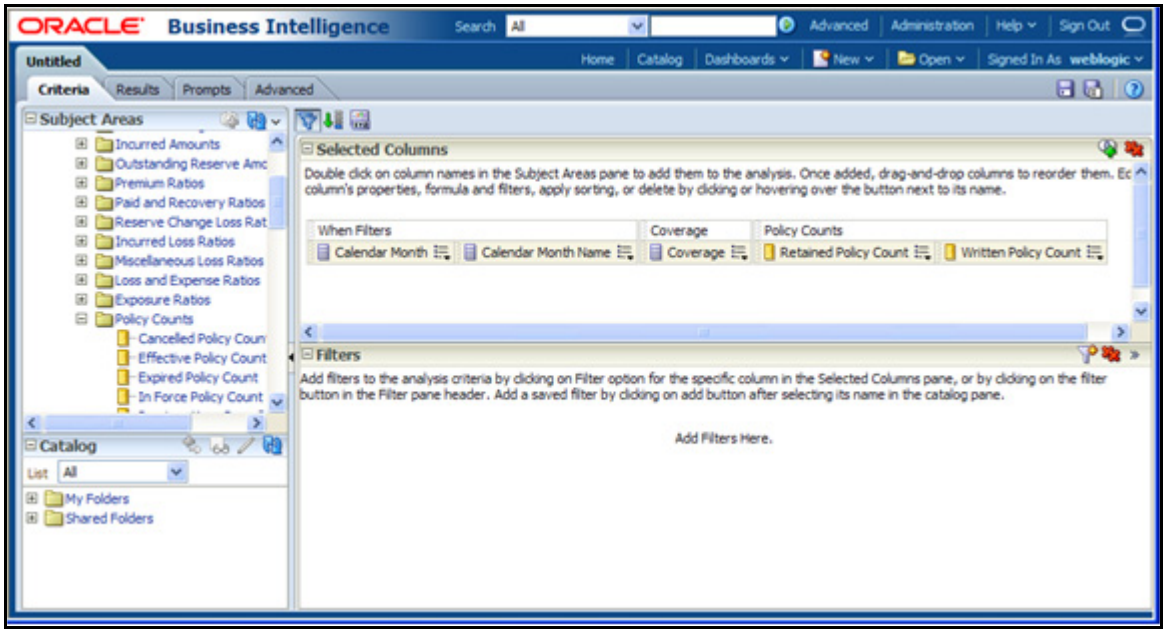


Figure 8: The Analysis Editor for Personal Auto

Chapter 2

Navigating the OII Scorecard and Analysis Reports

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.

ACTUARY

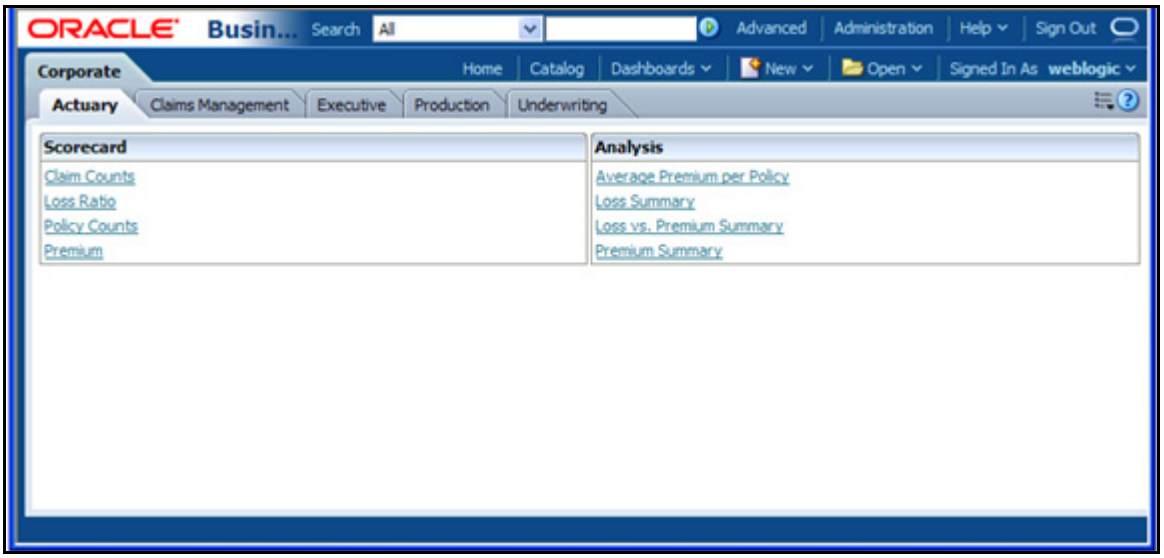


Figure 9: Actuary – Corporate

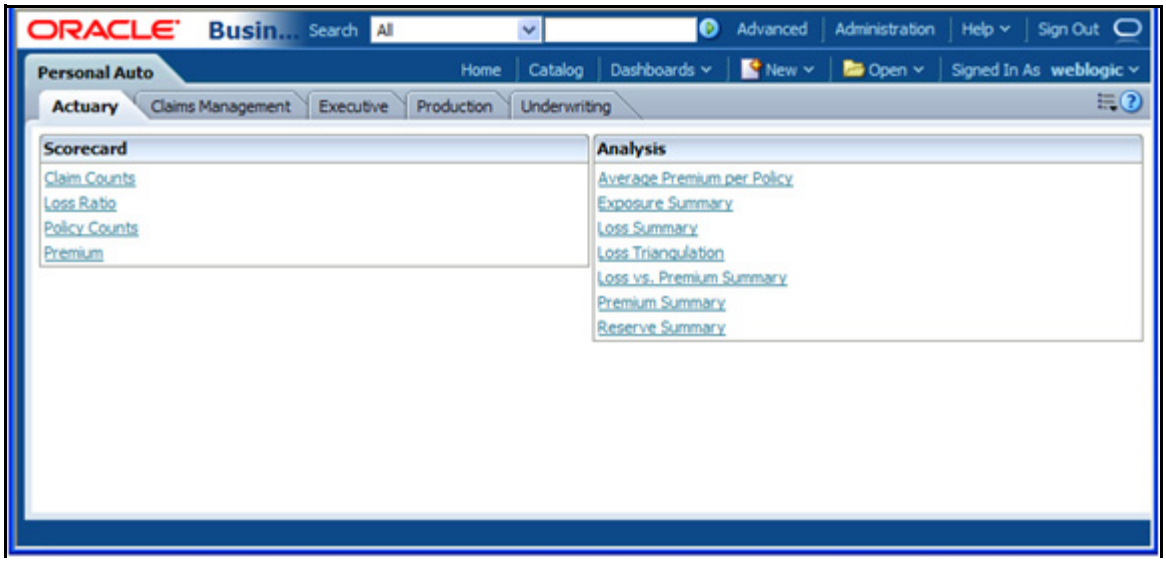


Figure 10: Actuary – Line of Business

CLAIMS MANAGEMENT

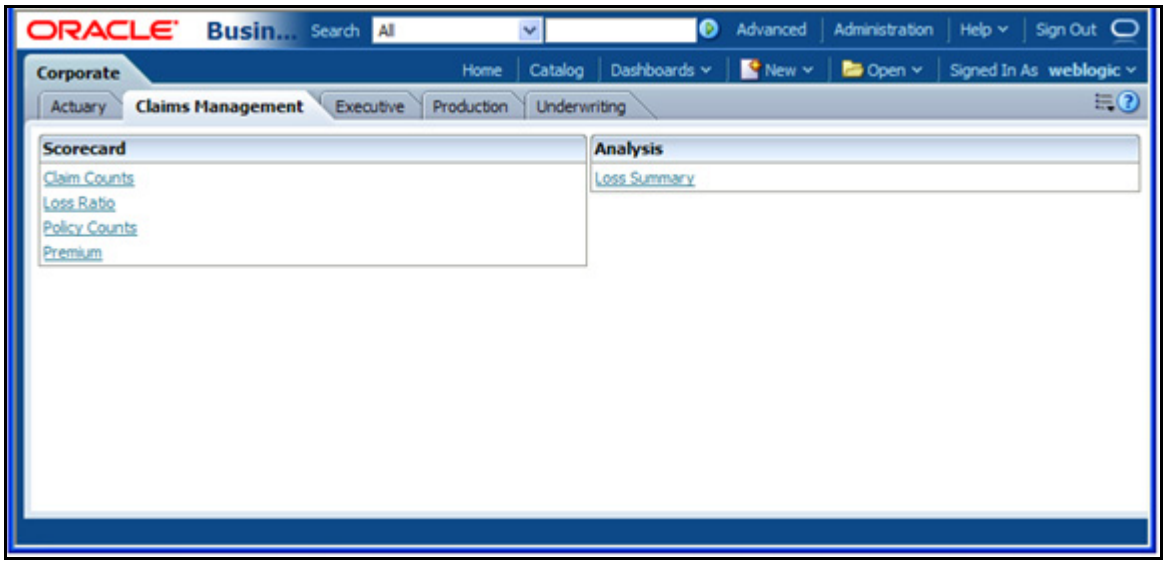


Figure 11: Claims Management – Corporate

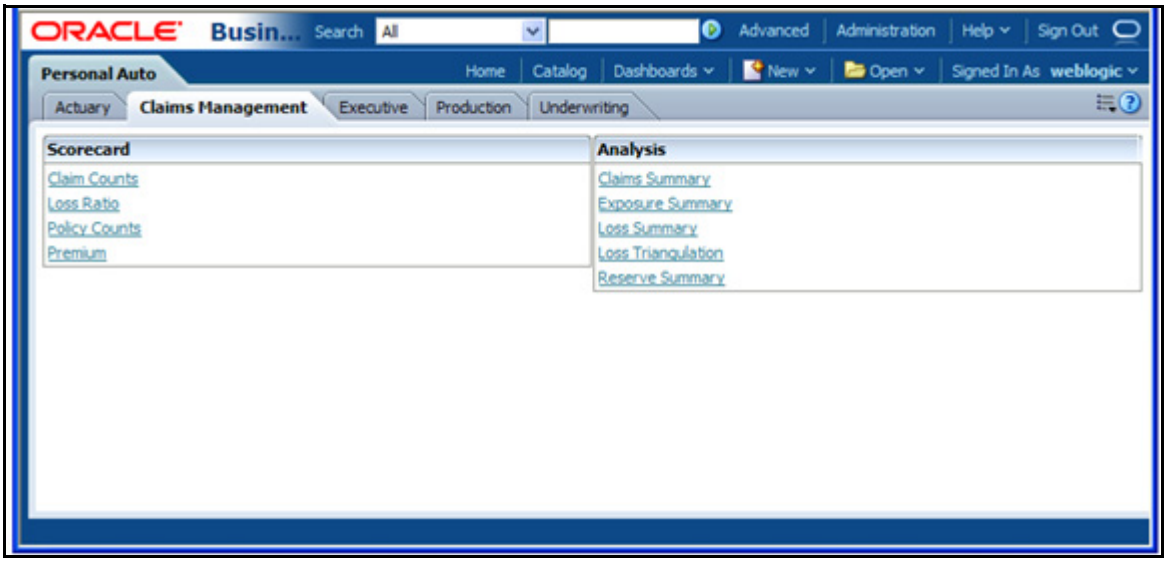


Figure 12: Claims Management – Line of Business

EXECUTIVE

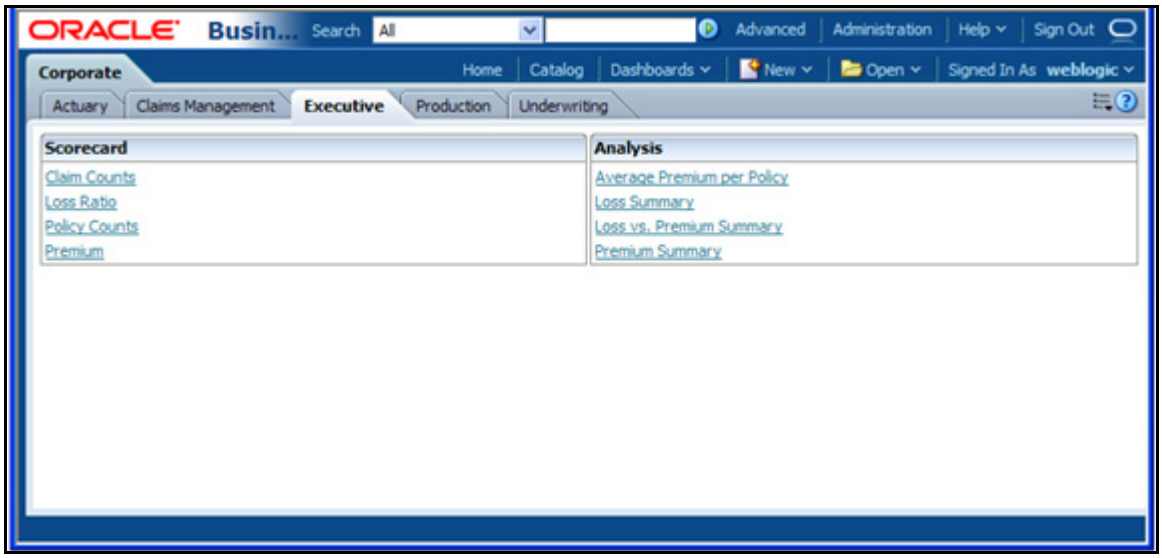


Figure 13: Executive – Corporate

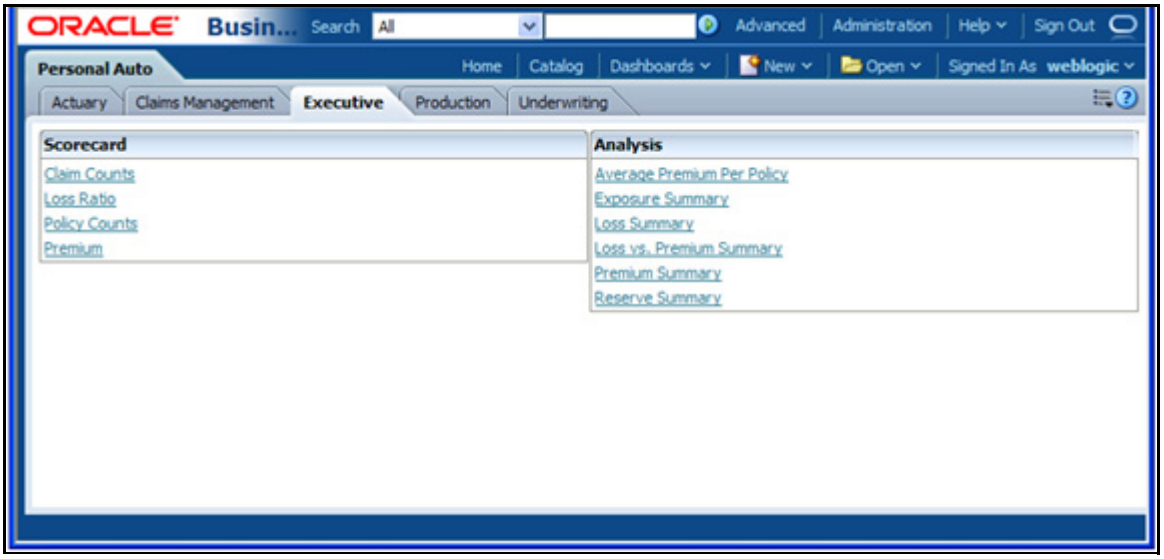


Figure 14: Executive – Line of Business

PRODUCTION

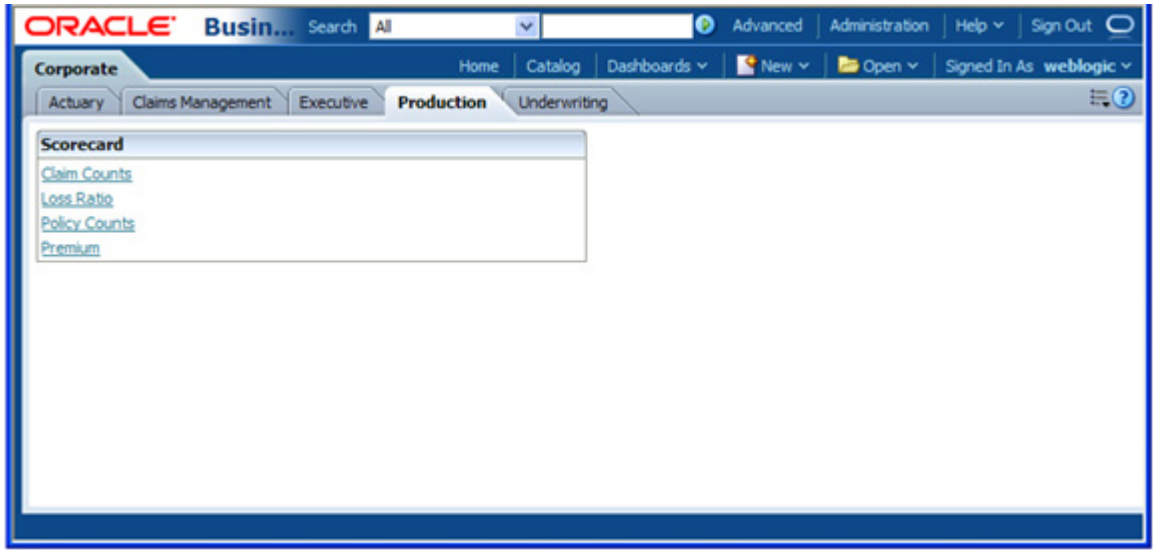


Figure 15: Production – Corporate

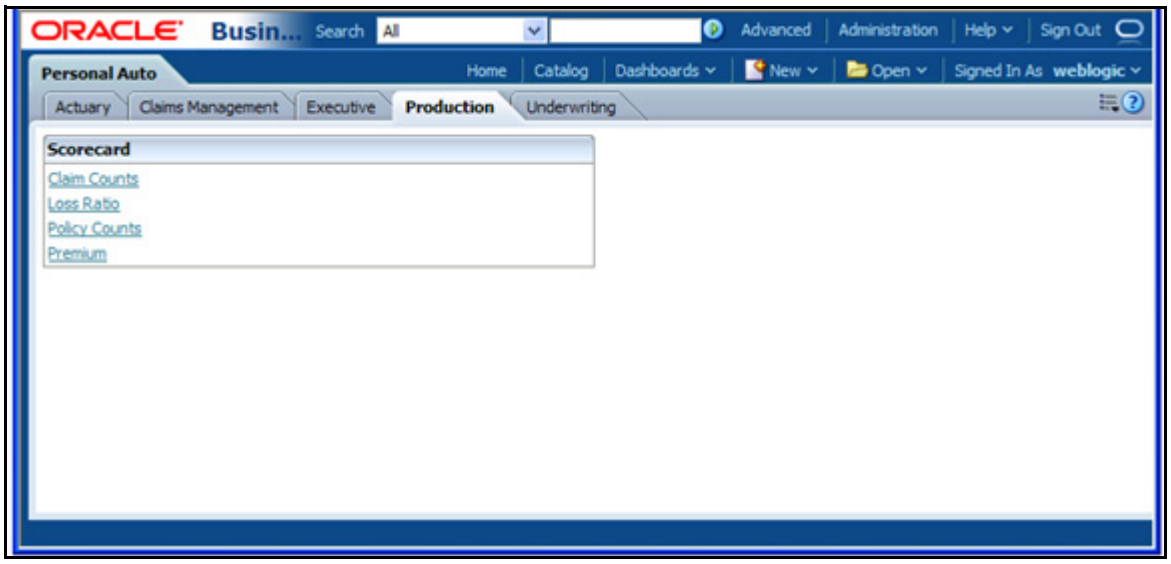


Figure 16: Production – Line of Business

UNDERWRITING

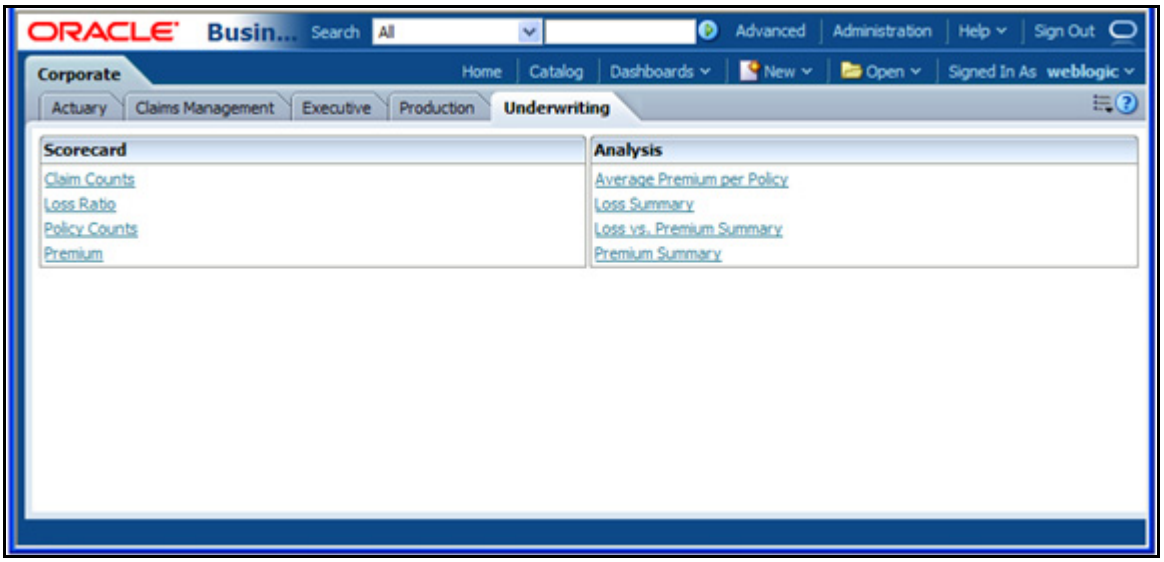


Figure 17: Underwriting - Corporate

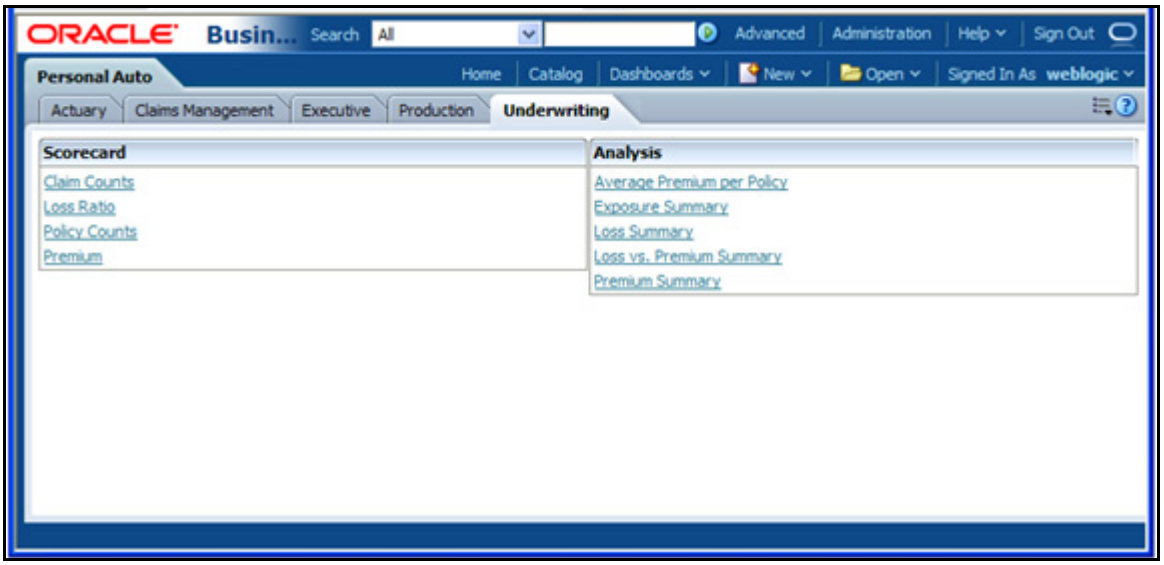


Figure 18: Underwriting – Line of Business

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.

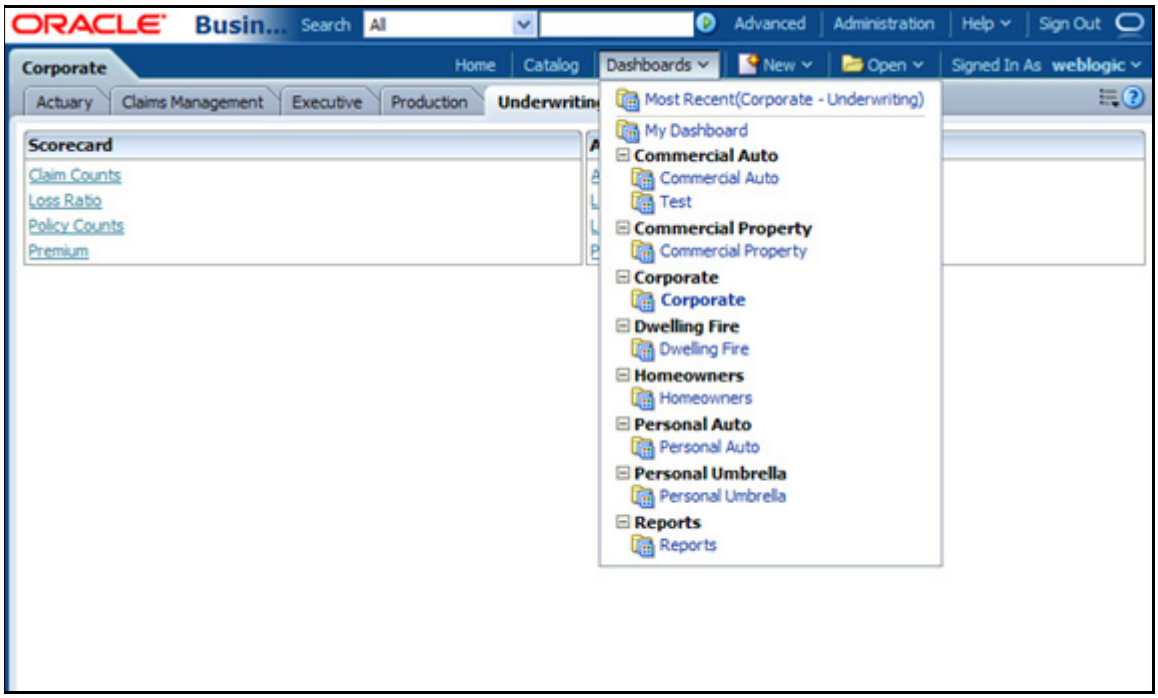


Figure 19: Line of Business Drop-Down List

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

- **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

SETTING UP REPORTS 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 graph 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 section shows how to select filter information for a Personal Auto's Loss Ratio report on the Scorecard dashboard.

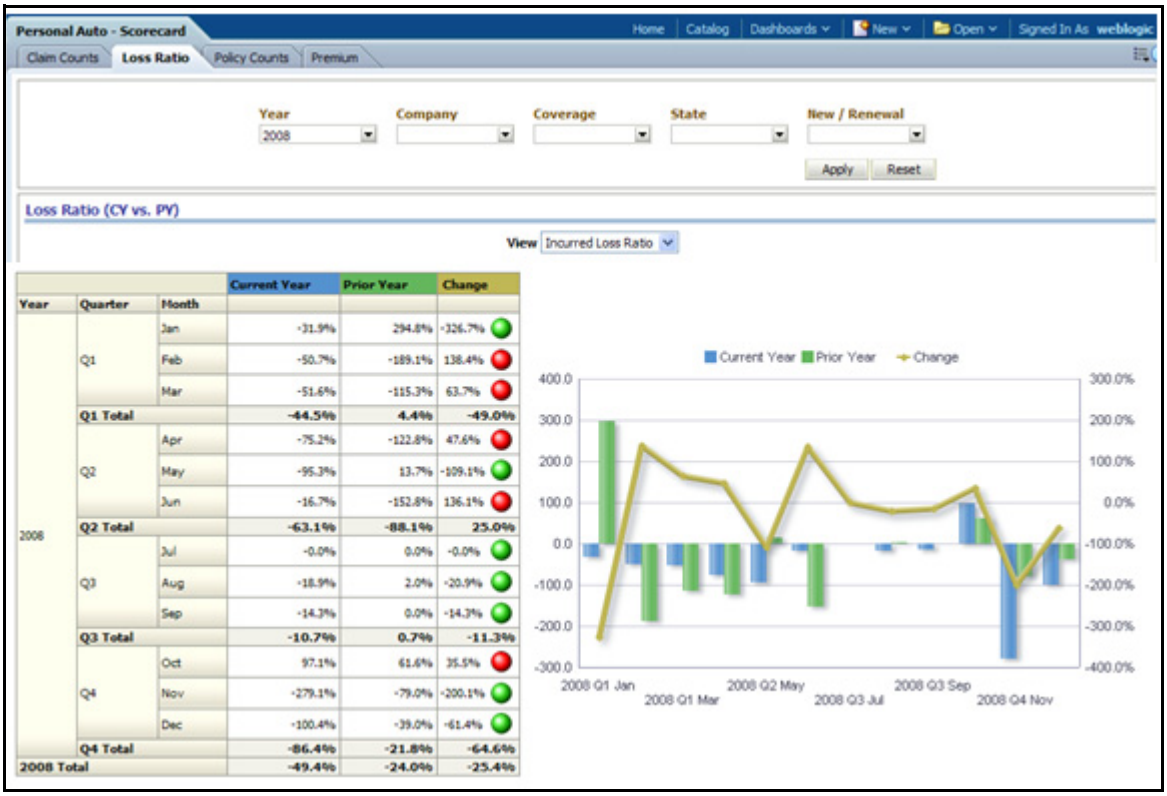


Figure 20: Selecting Filters for a Loss Ratio Scorecard Report (Personal Auto)

To specify the filters for a Loss Ratio report:

1. Click on the appropriate year from the **Year** drop-down list or accept the default time range. The default time range is the most recent year.

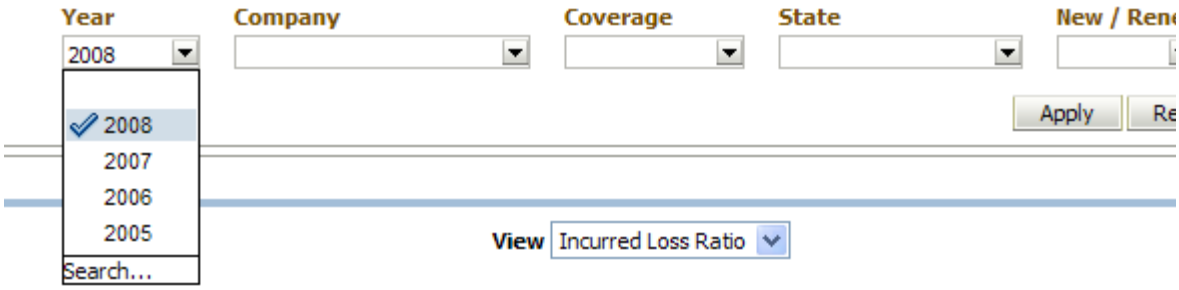


Figure 21: Select the Year from the Drop-Down List

2. At the **Company** field click on the arrow to display the list of available companies.:

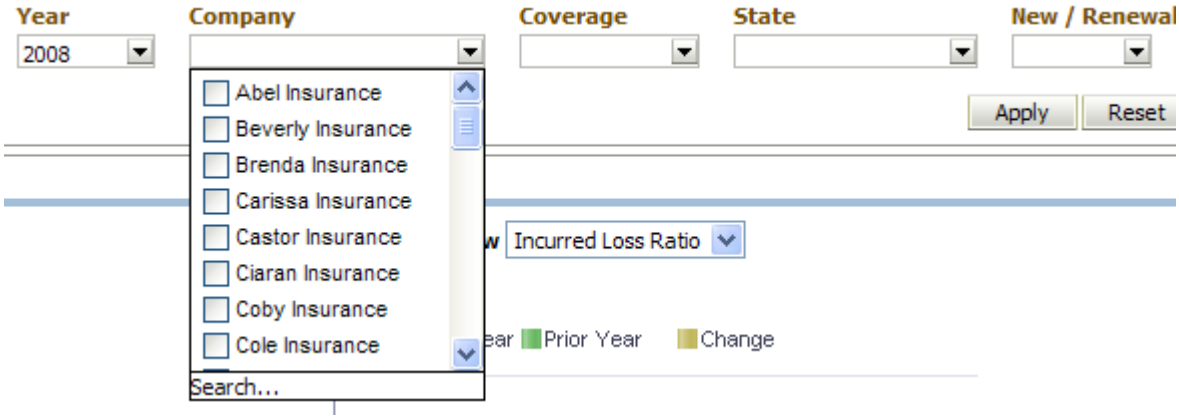


Figure 22: Select Company Fields

3. Select as many items from the list as necessary to setup the report.
4. Close the list by clicking on the area on the screen outside of the list.
5. Repeat steps 1-4 to select the rest of the filters as needed.
6. When all items are selected select the **Apply** button to save your entries.

Note	If none of the filters in a filter category are selected then by default data for all companies will be selected. To revert back to the default selections, select the **Reset** button.

To search for an item in a list:

The **Search...** option at the bottom of a list opens a dialog box which allows you to select/deselect multiple items. Use the buttons in the center of the dialog box to move items between the **Available** and **Selected** lists. Double-click an item to move it to the other list.

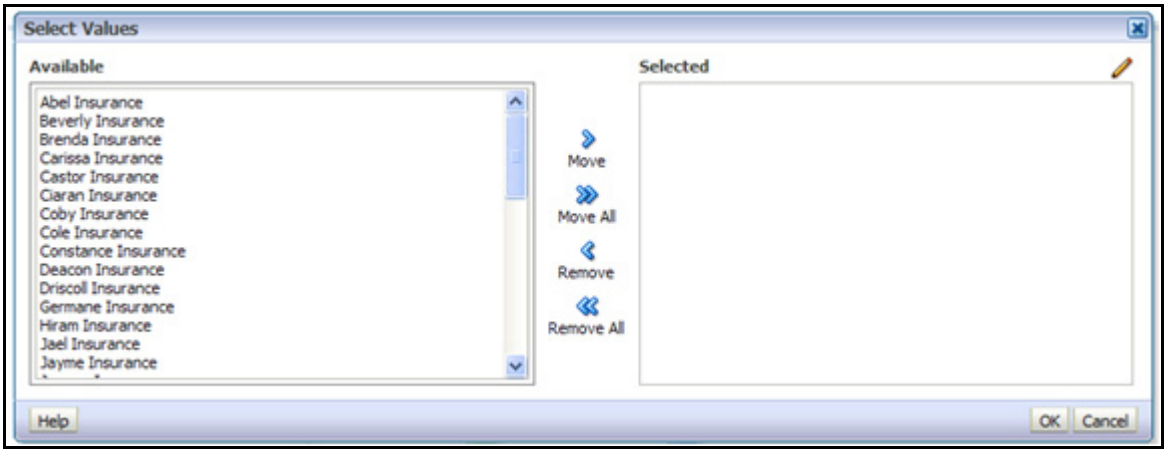


Figure 23: Select Values for Companies

To edit an item in the Selected list:

1. Select the **Edit** icon above the **Selected** list.

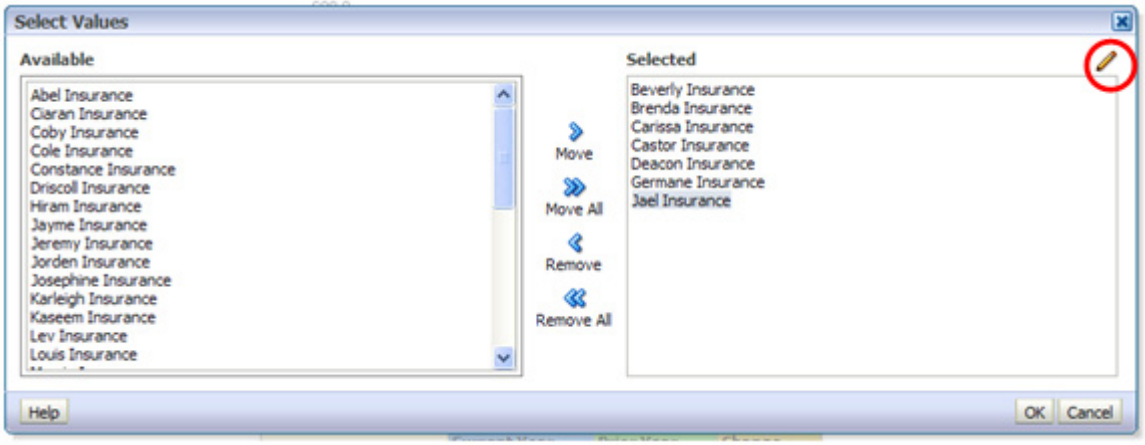


Figure 24: Edit an Item in a Selected List

2. A text box containing the selected item will appear on the screen.

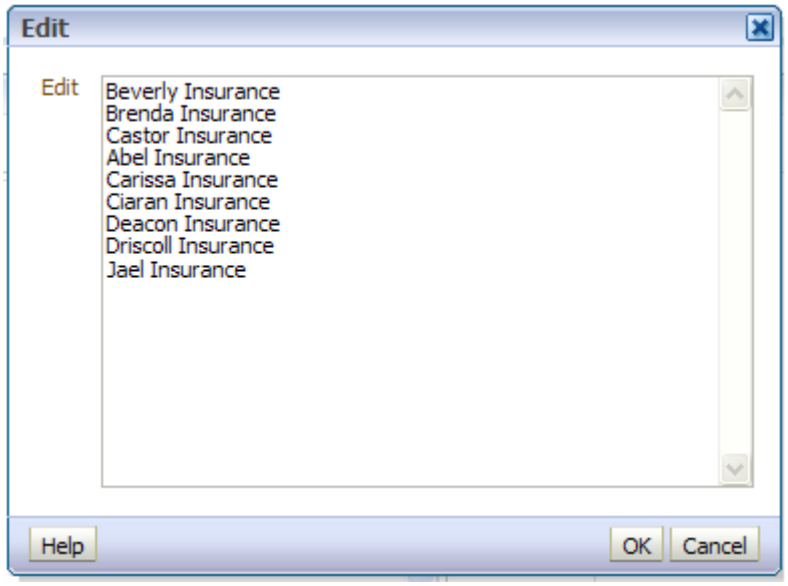


Figure 25: Edit Dialog Box

3. Edit the item and click **OK** to close the text box and save your changes.

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

Chapter 3

Using the 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

To open a report,.simply click on a report name on the Scorecard dashboard. Once you have opened a report, you can easily move from one report to another by selecting the tabs across the top of the screen.

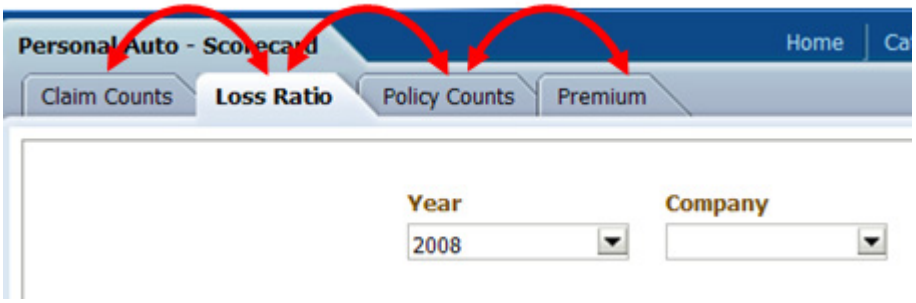


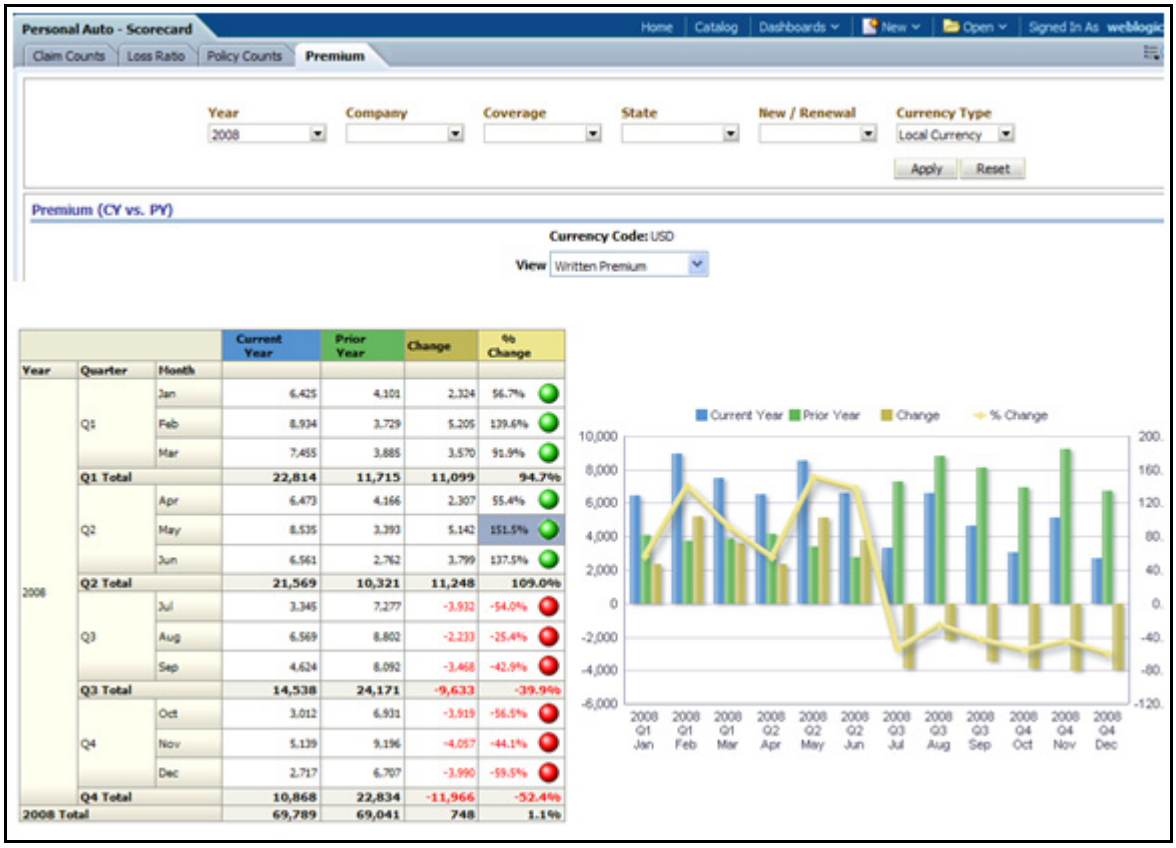
Figure 26: Select a Tab to Move to Another Report

VIEWING THE RESULTS OF A SCORECARD REPORT

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

LOB

A Line of Business (LOB) Scorecard report displays results specific to the selected Line of Business. The results are displayed in a table and graph.



Year	Quarter	Month	Current Year	Prior Year	Change	% Change
2008	Q1	Jan	6,425	4,101	2,324	56.7%
		Feb	8,934	3,729	5,205	139.6%
		Mar	7,455	3,885	3,570	91.9%
	Q1 Total		22,814	11,715	11,099	94.7%
	Q2	Apr	6,473	4,166	2,307	55.4%
		May	8,535	3,393	5,142	151.5%
		Jun	6,561	2,762	3,799	137.5%
	Q2 Total		21,569	10,321	11,248	109.0%
	Q3	Jul	3,345	7,277	-3,932	-54.0%
		Aug	6,569	8,802	-2,233	-25.4%
		Sep	4,624	8,092	-3,468	-42.9%
	Q3 Total		14,538	24,171	-9,633	-39.9%
	Q4	Oct	3,012	6,931	-3,919	-56.5%
		Nov	5,139	9,196	-4,057	-44.1%
		Dec	2,717	6,707	-3,990	-59.5%
	Q4 Total		10,868	22,834	-11,966	-52.4%
2008 Total			69,789	69,041	748	1.1%

Figure 27: Premium Results for Personal Auto

The table shows year, quarter, and month fully expanded with totals for each level.

			Current Year	Prior Year	Change	% Change
Year	**Quarter**	**Month**				
2008	Q1	Jan	6,425	4,101	2,324	56.7%
		Feb	8,934	3,729	5,205	139.6%
		Mar	7,455	3,885	3,570	91.9%
	Q1 Total		**22,814**	**11,715**	**11,099**	**94.7%**
	Q2	Apr	6,473	4,166	2,307	55.4%
		May	8,535	3,393	5,142	151.5%
		Jun	6,561	2,762	3,799	137.5%
	Q2 Total		**21,569**	**10,321**	**11,248**	**109.0%**
	Q3	Jul	3,345	7,277	-3,932	-54.0%
		Aug	6,569	8,802	-2,233	-25.4%
		Sep	4,624	8,092	-3,468	-42.9%
	Q3 Total		**14,538**	**24,171**	**-9,633**	**-39.9%**
	Q4	Oct	3,012	6,931	-3,919	-56.5%
		Nov	5,139	9,196	-4,057	-44.1%
		Dec	2,717	6,707	-3,990	-59.5%
	Q4 Total		**10,868**	**22,834**	**-11,966**	**-52.4%**
2008 Total			**69,789**	**69,041**	**748**	**1.1%**

Figure 28: Tables Display Results for Year/Quarter/Month

The graph shows data broken down by month.

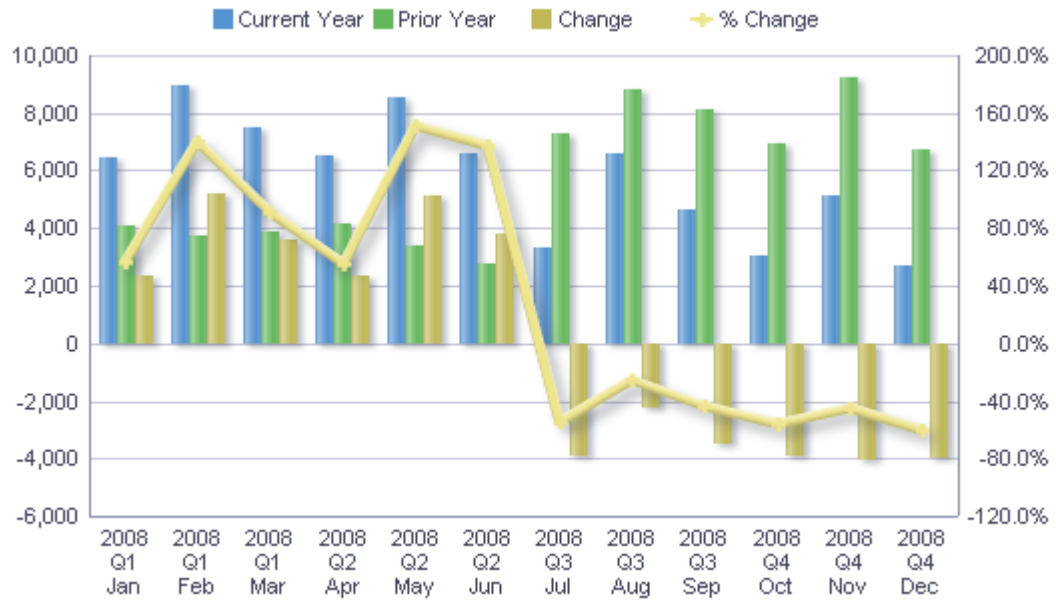


Figure 29: Graphs Show Data by Month

Corporate

Corporate Scorecard reports shows data across all lines of business. The results for Corporate reports are only shown in a table format.

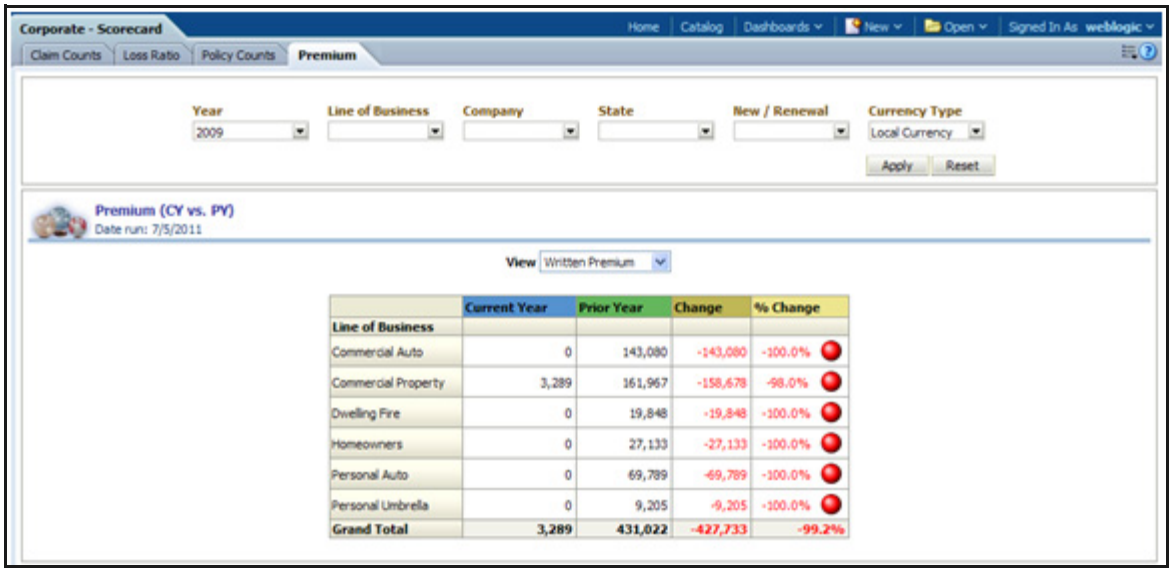


Figure 30: Premium Results for Corporate

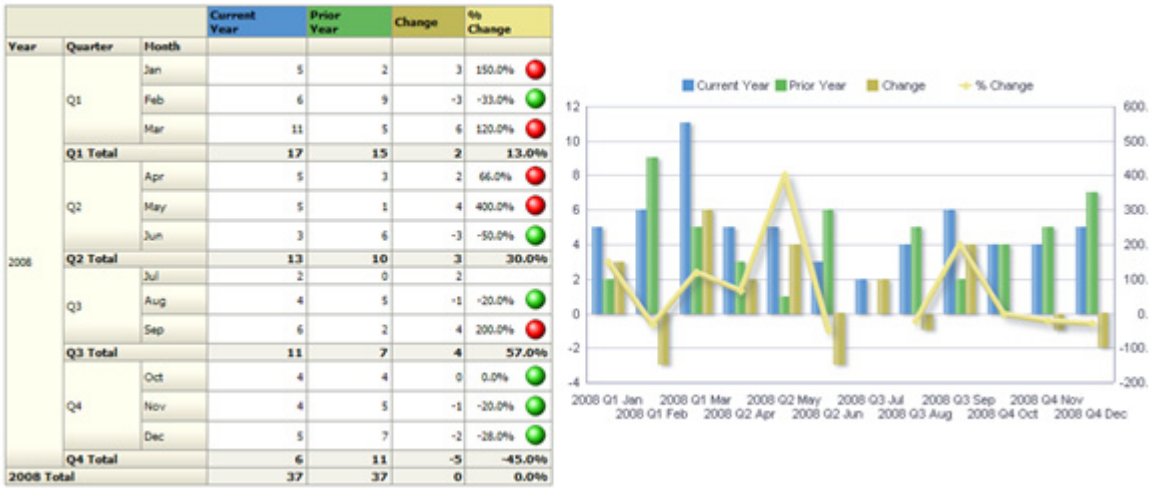
SCORECARD REPORT FEATURES

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 graphs and tables
- Ability to view results by metric
- Positive and negative change indicators in tables
- Drill down feature in the Policy Count report

Color-Coded Graphs and Tables

All Scorecard reports use standard colors for all columns and bars in the tables and graphs to provide quick interpretation. The color of a bar in the graph directly corresponds to the color of the column in the table.

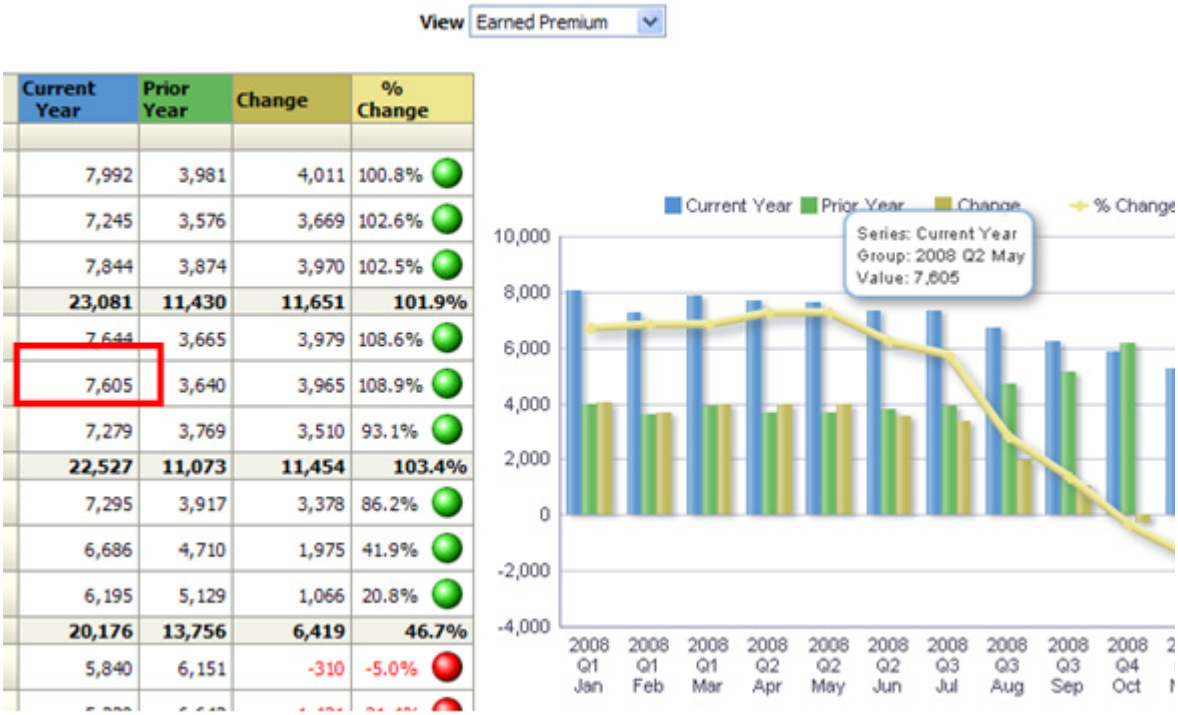


Year	Quarter	Month	Current Year	Prior Year	Change	% Change
2008	Q1	Jan	5	2	3	150.0%
		Feb	6	9	-3	-33.0%
		Mar	11	5	6	120.0%
	Q1 Total		17	15	2	13.0%
	Q2	Apr	5	3	2	66.0%
		May	5	1	4	400.0%
		Jun	3	6	-3	-50.0%
	Q2 Total		13	10	3	30.0%
	Q3	Jul	2	0	2	
		Aug	4	5	-1	-20.0%
		Sep	6	2	4	200.0%
	Q3 Total		11	7	4	57.0%
	Q4	Oct	4	4	0	0.0%
		Nov	4	5	-1	-20.0%
		Dec	5	7	-2	-28.0%
	Q4 Total		6	11	-5	-45.0%
2008 Total			37	37	0	0.0%

Figure 31: Color-Coded Columns in Tables

Rollover Feature in Graphs

Sections of the Graph have rollover capability that will show corresponding data from the table. The graph below shows the results of a Premium Scorecard report for Personal Auto. The results are displayed by “Earned Premium”. If you move the cursor over the “Current Year” bar, a box appears on the graph that shows the corresponding Earned Premium amount under the “Prior Year” column in the table below.



Current Year	Prior Year	Change	% Change
7,992	3,981	4,011	100.8%
7,245	3,576	3,669	102.6%
7,844	3,874	3,970	102.5%
23,081	**11,430**	**11,651**	**101.9%**
7,644	3,665	3,979	108.6%
7,605	3,640	3,965	108.9%
7,279	3,769	3,510	93.1%
22,527	**11,073**	**11,454**	**103.4%**
7,295	3,917	3,378	86.2%
6,686	4,710	1,975	41.9%
6,195	5,129	1,066	20.8%
20,176	**13,756**	**6,419**	**46.7%**
5,840	6,151	-310	-5.0%

Figure 32: Rollover Capabilities in Graph

If you hover over any node in the line above the graph, a similar box will appear and show the percentage from the applicable "% Change" column.

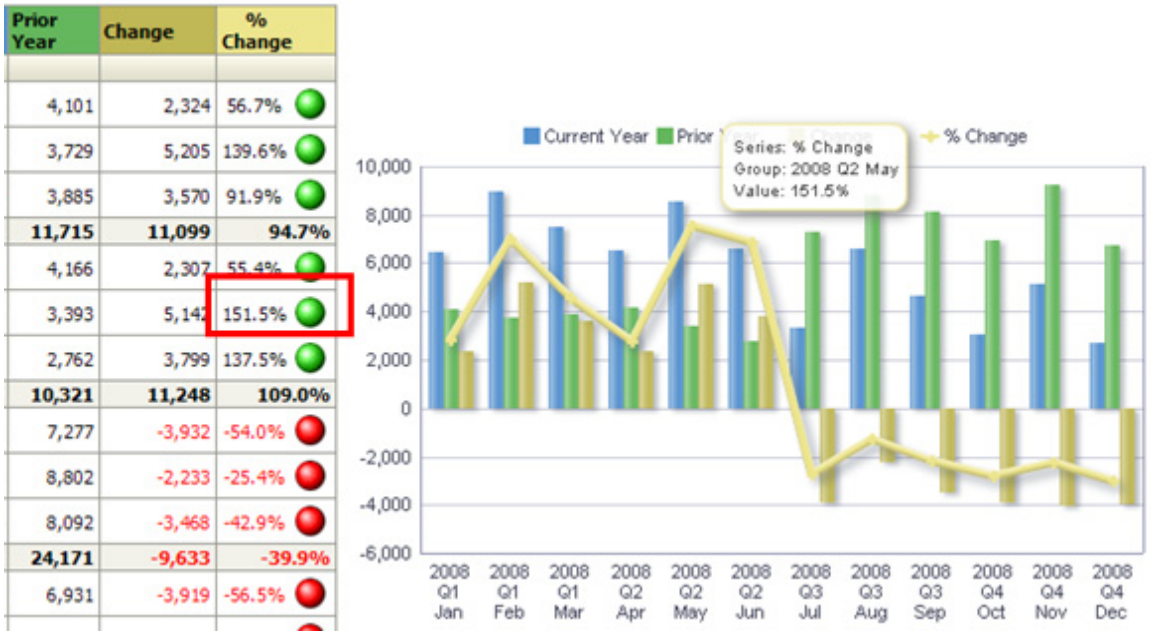


Figure 33: Rollover Capabilities in Graphs - "% Change"

Viewing 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.

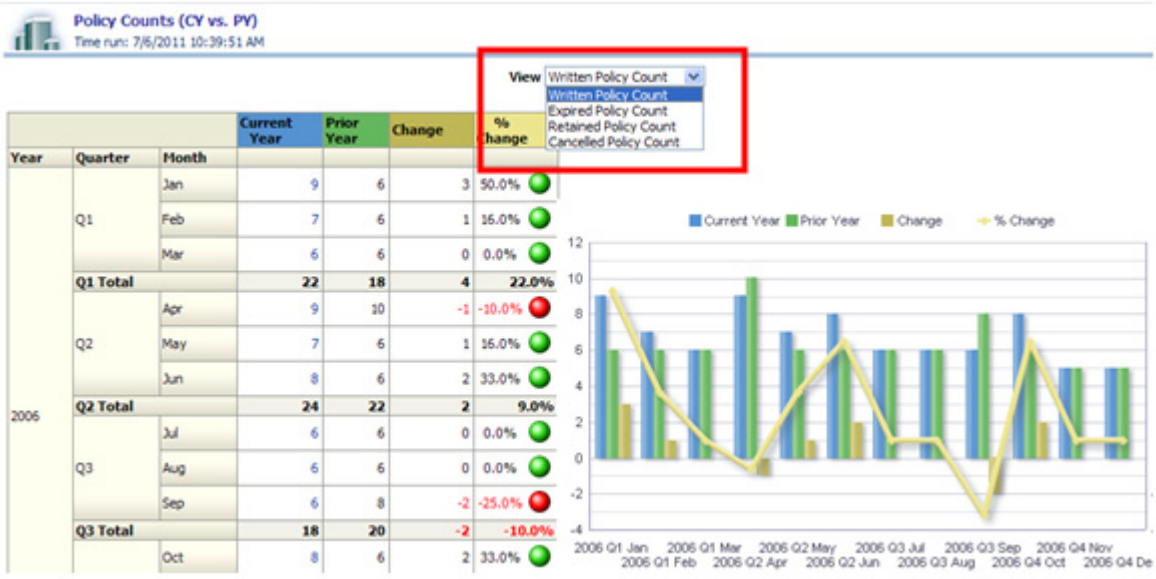


Figure 34: Policy Counts Results Sorted by Written Policy Count

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 graph.

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 for the Corporate mart. It measures changes in **Written Premium** between a Current and Prior year time period for selected Lines of Business. In this example those Lines of Business are Dwelling File and Homeowners.

At a glance the results seem fairly obvious. The *increase* in Written Premium for Homeowners between the Current and Prior year is indicated by a green sphere. A *decrease* in Written Premium for Dwelling Fire is marked by a red sphere.

View Written Premium

	Current Year	Prior Year	Change	% Change
Line of Business				
Dwelling Fire	29,945	30,148	-203	-0.7%
Homeowners	30,290	30,012	278	0.9%
Grand Total	**60,235**	**60,160**	**75**	**0.1%**

Figure 35: Changes in Written Premium (Corporate)

However, if **Cancelled Premium** is selected from the drop-down list the following results appear.

View Cancelled Premium

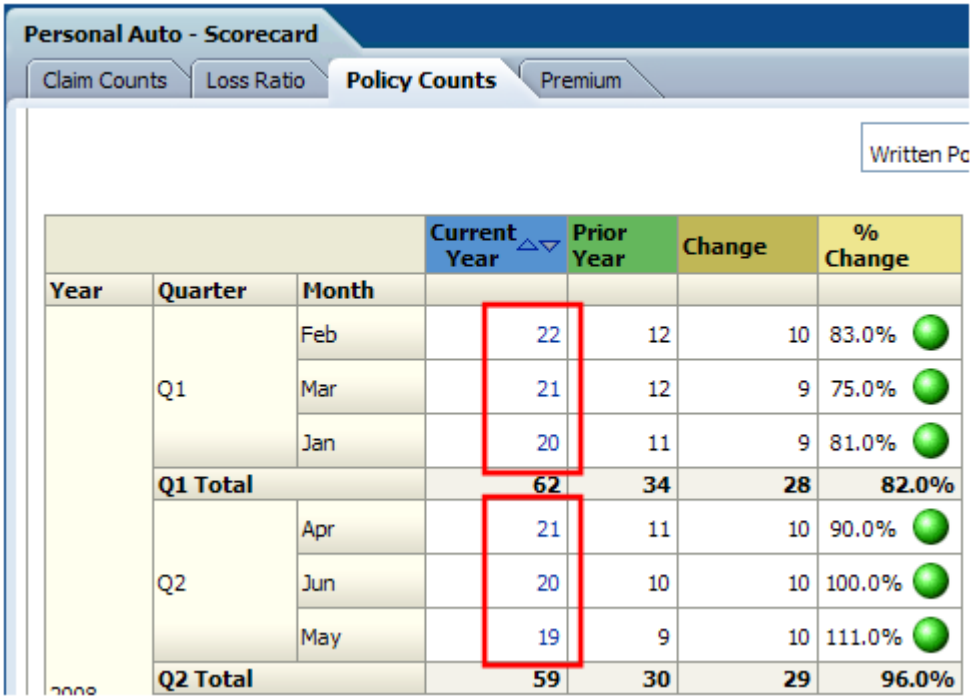
	Current Year	Prior Year	Change	% Change
Line of Business				
Dwelling Fire	356	7,558	-7,202	-95.3%
Homeowners	892	626	266	42.5%
Grand Total	**1,248**	**8,184**	**-6,936**	**-84.8%**

Figure 36: Changes in Cancelled Premium (Corporate)

For Dwelling Fire, a *decrease* in the number of Cancelled Premiums is indicated by a green sphere. The *increase* in Cancelled Premiums for Homeowners 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.

Drill Down Feature in the Policy Count Report

Each amount under the Current Year column in the Policy Count table for both a Line of Business and Corporate are active links. When the user selects a value in the table a separate screen opens and displays records for all policies in the selected time period.



Year	Quarter	Month	Current Year	Prior Year	Change	% Change
	Q1	Feb	22	12	10	83.0%
		Mar	21	12	9	75.0%
		Jan	20	11	9	81.0%
	Q1 Total		**62**	**34**	**28**	**82.0%**
	Q2	Apr	21	11	10	90.0%
		Jun	20	10	10	100.0%
		May	19	9	10	111.0%
	Q2 Total		**59**	**30**	**29**	**96.0%**

Figure 37: Current Year Amounts (Line of Business)

Line of Business	Current Year	Prior Year	Change	% Change
Commercial Auto	73	73	0	0.0%
Commercial Property	82	82	0	0.0%
Dwelling Fire	149	150	-1	-1.0%
Homeowners	275	264	11	4.0%
Personal Auto	183	130	53	40.0%
Personal Umbrella	137	137	0	0.0%
Grand Total	**899**	**836**	**63**	**7.0%**

Figure 38: Current Year Amounts (Corporate)

Users can click on a Current Year bar in the Policy Count graph for a Line of Business to display a list of policy records.

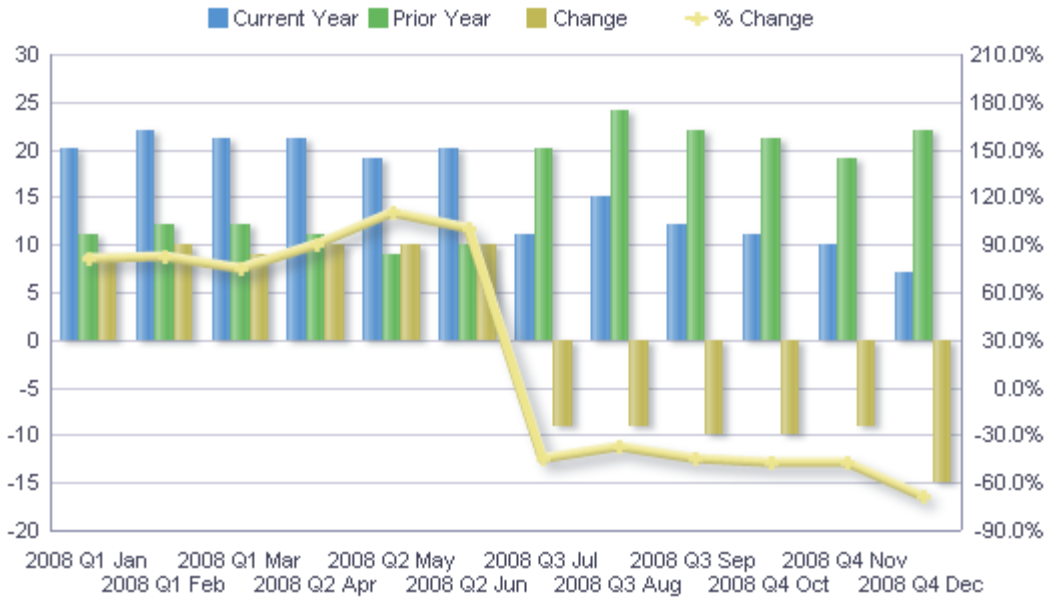


Figure 39: Current Year Bar also Displays Policy Records

To view the Current Year records for a particular month:

1. In the table, click on an amount under the Current Year column. A tooltip with the name of the particular metric that you are sorting the results by will appear on the screen:

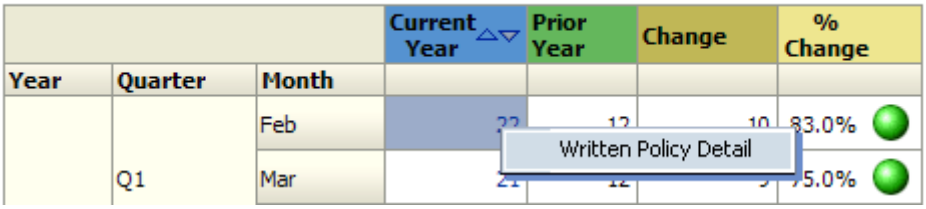
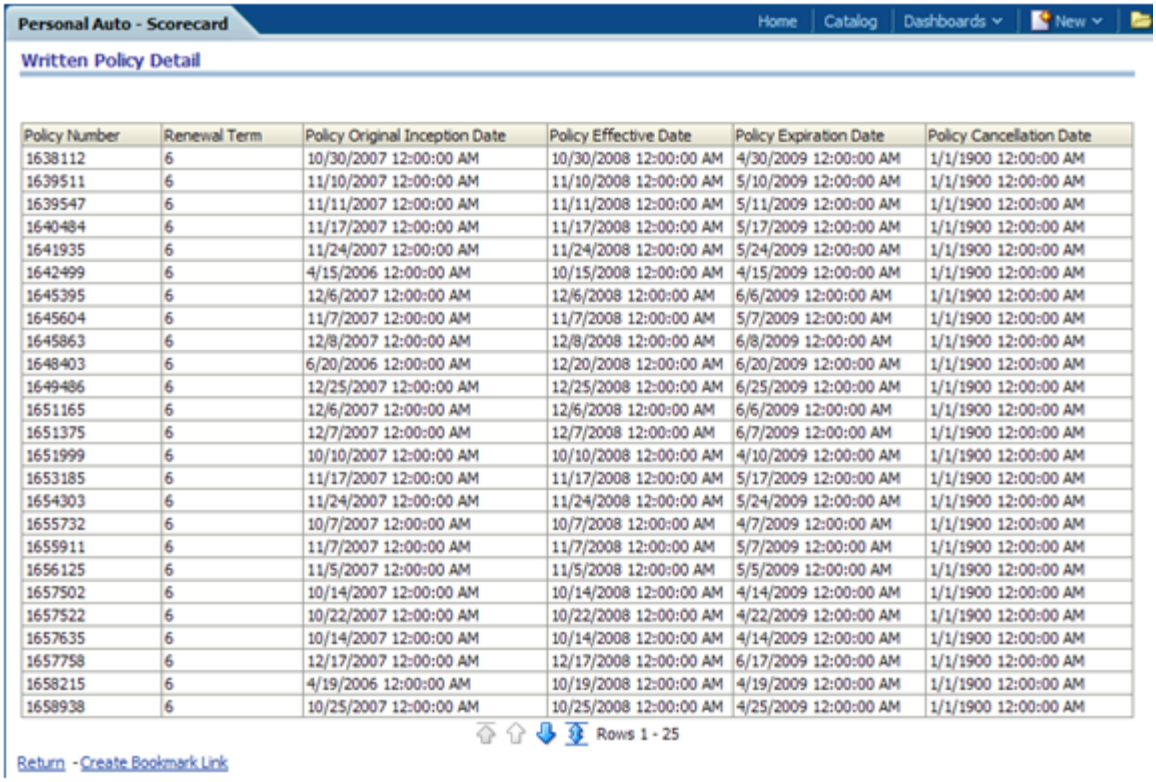


Figure 40: The Written Policy Detail Tooltip

2. Click on the tooltip. A separate screen will open showing policy details for each of the records in the time period.



Personal Auto - Scorecard

Home | Catalog | Dashboards | New

Written Policy Detail

Policy Number	Renewal Term	Policy Original Inception Date	Policy Effective Date	Policy Expiration Date	Policy Cancellation Date
1638112	6	10/30/2007 12:00:00 AM	10/30/2008 12:00:00 AM	4/30/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1639511	6	11/10/2007 12:00:00 AM	11/10/2008 12:00:00 AM	5/10/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1639547	6	11/11/2007 12:00:00 AM	11/11/2008 12:00:00 AM	5/11/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1640484	6	11/17/2007 12:00:00 AM	11/17/2008 12:00:00 AM	5/17/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1641935	6	11/24/2007 12:00:00 AM	11/24/2008 12:00:00 AM	5/24/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1642499	6	4/15/2006 12:00:00 AM	10/15/2008 12:00:00 AM	4/15/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1645395	6	12/6/2007 12:00:00 AM	12/6/2008 12:00:00 AM	6/6/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1645604	6	11/7/2007 12:00:00 AM	11/7/2008 12:00:00 AM	5/7/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1645863	6	12/8/2007 12:00:00 AM	12/8/2008 12:00:00 AM	6/8/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1648403	6	6/20/2006 12:00:00 AM	12/20/2008 12:00:00 AM	6/20/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1649486	6	12/25/2007 12:00:00 AM	12/25/2008 12:00:00 AM	6/25/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1651165	6	12/6/2007 12:00:00 AM	12/6/2008 12:00:00 AM	6/6/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1651375	6	12/7/2007 12:00:00 AM	12/7/2008 12:00:00 AM	6/7/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1651999	6	10/10/2007 12:00:00 AM	10/10/2008 12:00:00 AM	4/10/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1653185	6	11/17/2007 12:00:00 AM	11/17/2008 12:00:00 AM	5/17/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1654303	6	11/24/2007 12:00:00 AM	11/24/2008 12:00:00 AM	5/24/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1655732	6	10/7/2007 12:00:00 AM	10/7/2008 12:00:00 AM	4/7/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1655911	6	11/7/2007 12:00:00 AM	11/7/2008 12:00:00 AM	5/7/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1656125	6	11/5/2007 12:00:00 AM	11/5/2008 12:00:00 AM	5/5/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1657502	6	10/14/2007 12:00:00 AM	10/14/2008 12:00:00 AM	4/14/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1657522	6	10/22/2007 12:00:00 AM	10/22/2008 12:00:00 AM	4/22/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1657635	6	10/14/2007 12:00:00 AM	10/14/2008 12:00:00 AM	4/14/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1657758	6	12/17/2007 12:00:00 AM	12/17/2008 12:00:00 AM	6/17/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1658215	6	4/19/2006 12:00:00 AM	10/19/2008 12:00:00 AM	4/19/2009 12:00:00 AM	1/1/1900 12:00:00 AM
1658938	6	10/25/2007 12:00:00 AM	10/25/2008 12:00:00 AM	4/25/2009 12:00:00 AM	1/1/1900 12:00:00 AM

Rows 1 - 25

Return - Create Bookmark Link

Figure 41: Policy Details for Written Policy Records

3. Select the **Return** link below the table to return to the Policy Counts report.

To display records from the graph, simply click on a Current Year bar for a particular month to display a tooltip that will open the table of policy records.

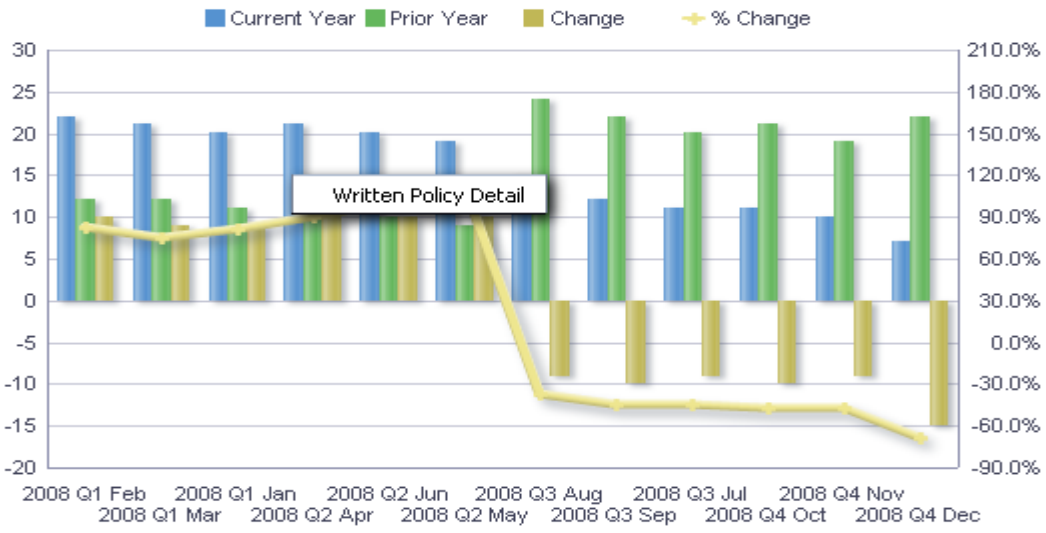


Figure 42: Records can be Accessed by Selecting a "Current Year" Bar

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 lists.

- **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.

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

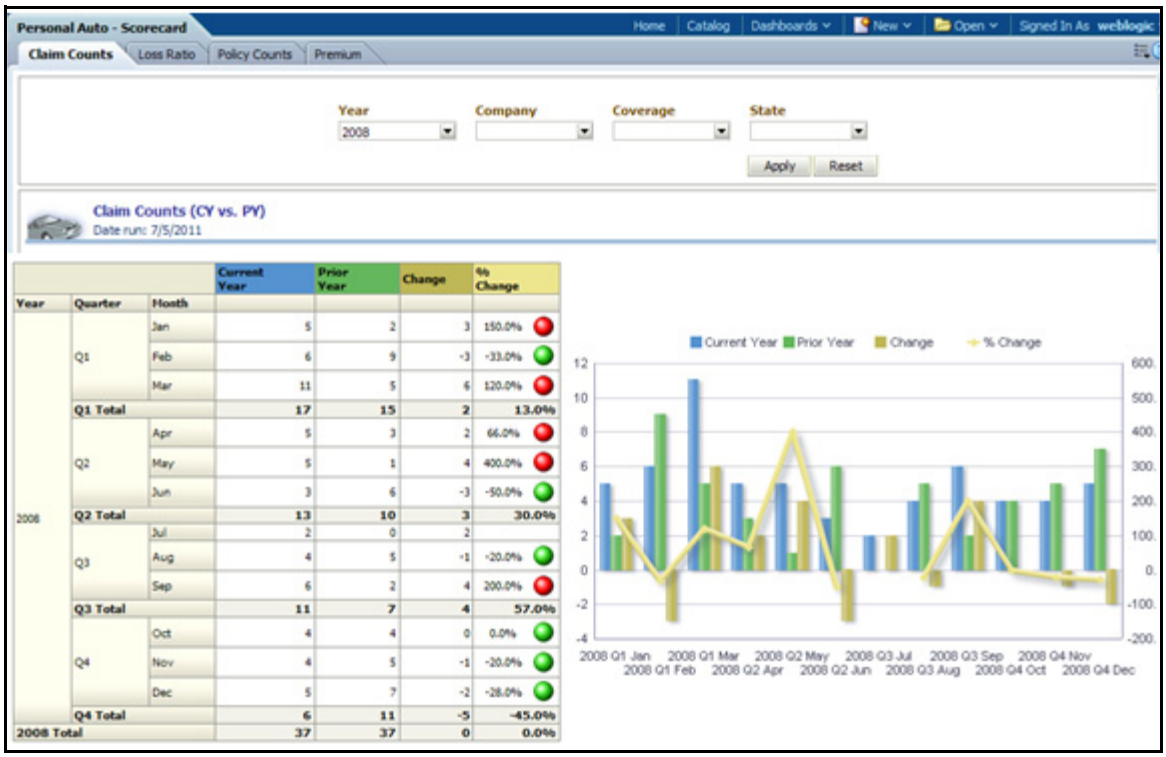


Figure 43: Claim Counts (Personal Auto)

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 lists.

- **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.

Step 3: Select the **Apply** 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

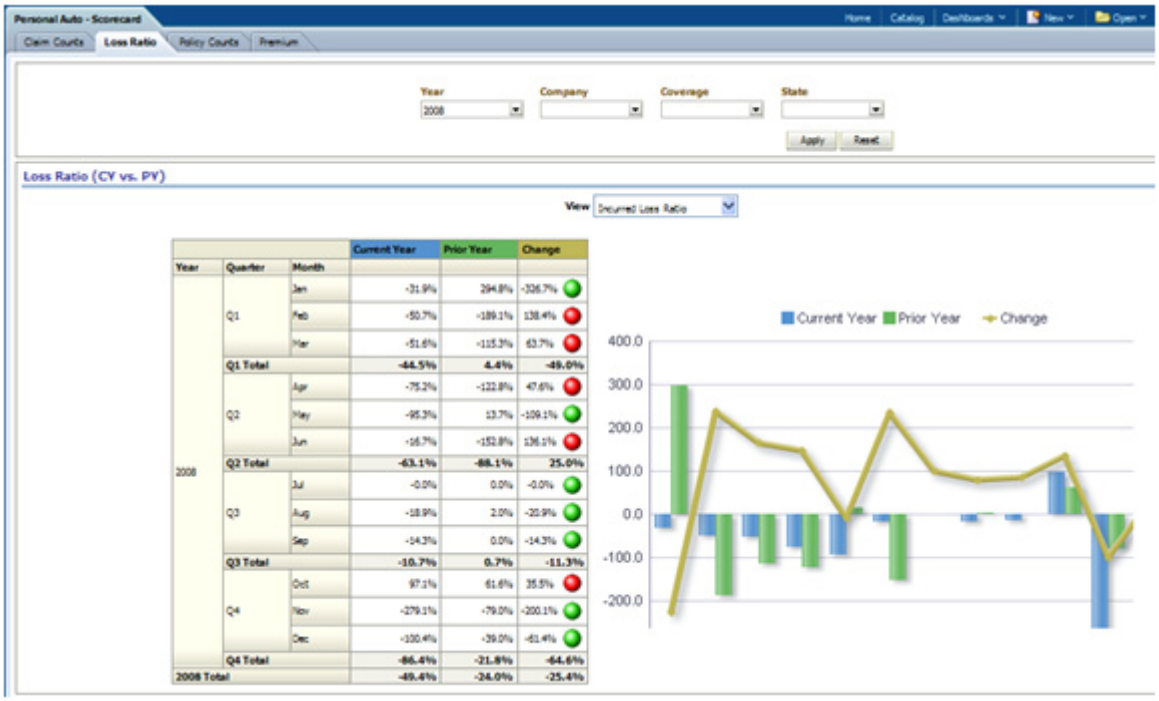


Figure 44: Loss Ratio (Personal Auto)

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 lists.

- **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.

Step 3: Select the **Apply** 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

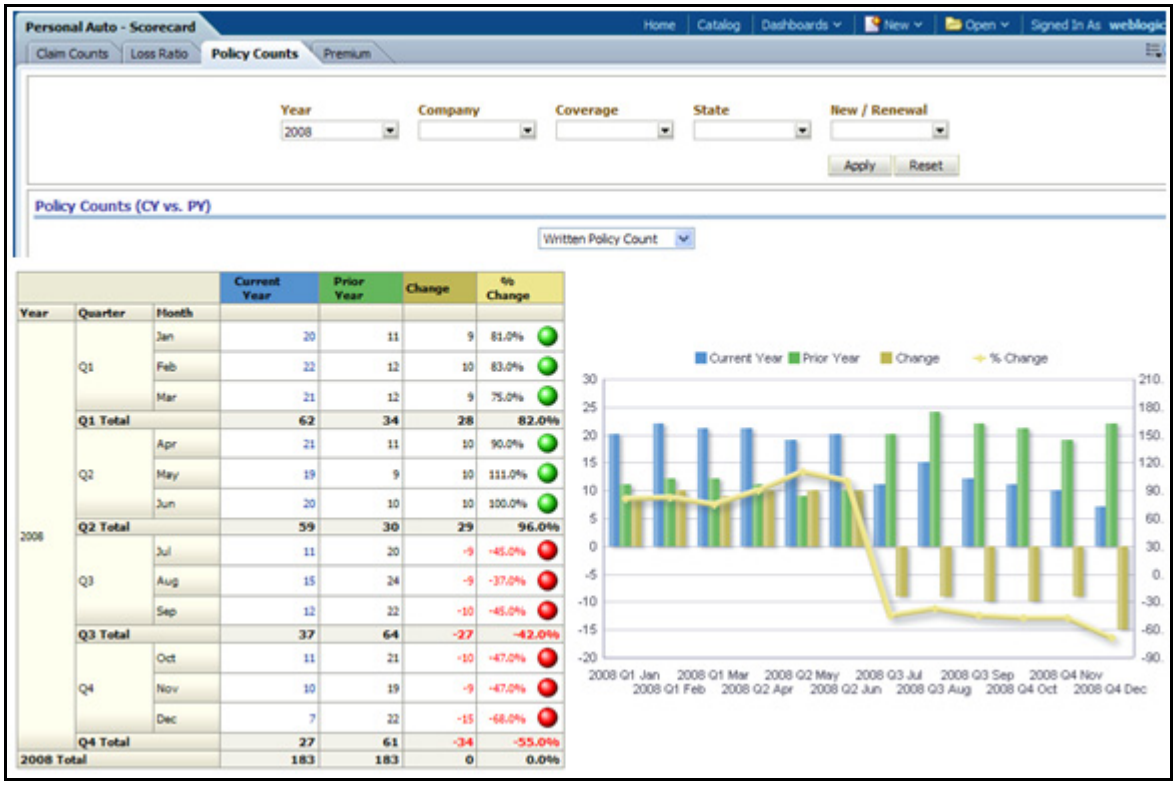


Figure 45: Policy Counts (Personal Auto)

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 lists.

- **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 **Apply** 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

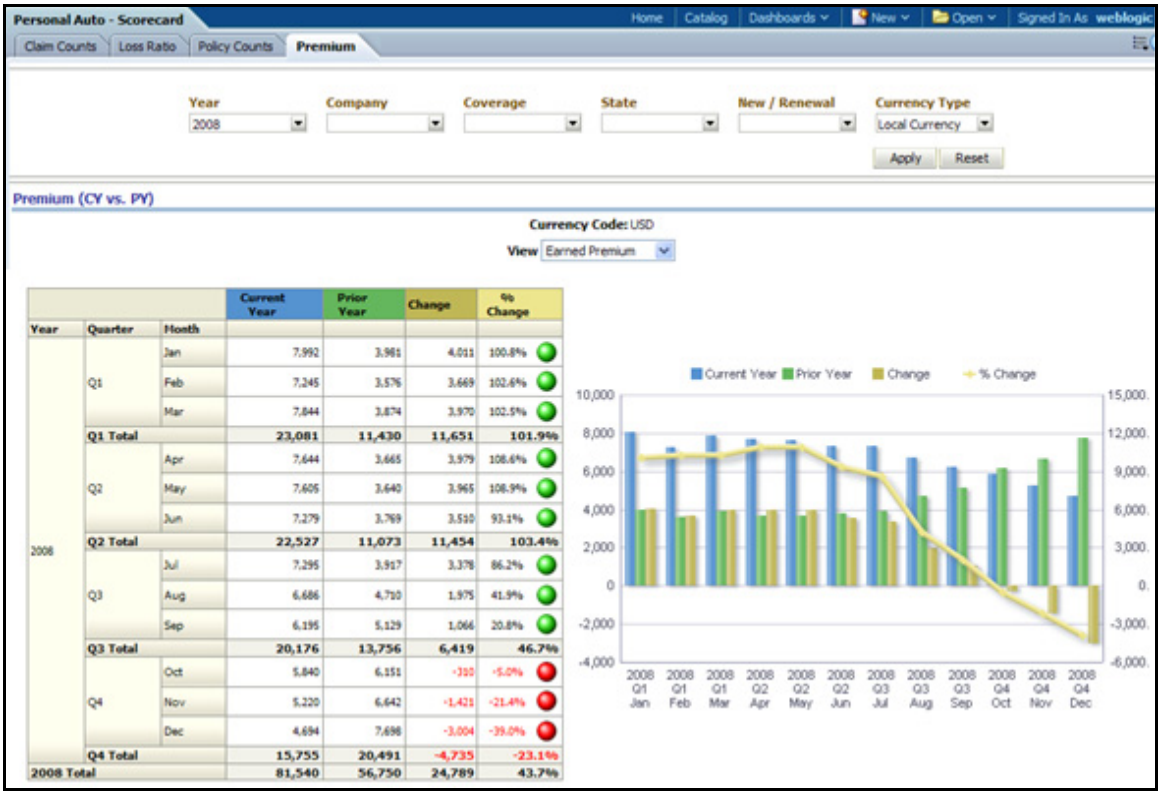


Figure 46: Premium (Personal Auto)

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 lists.

- **Line of Business** – the name(s) of the Line of Business.
- **Company** – the name(s) of the company.
- **State** – the state or geopolitical area.

Step 3: Select the **Apply** 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

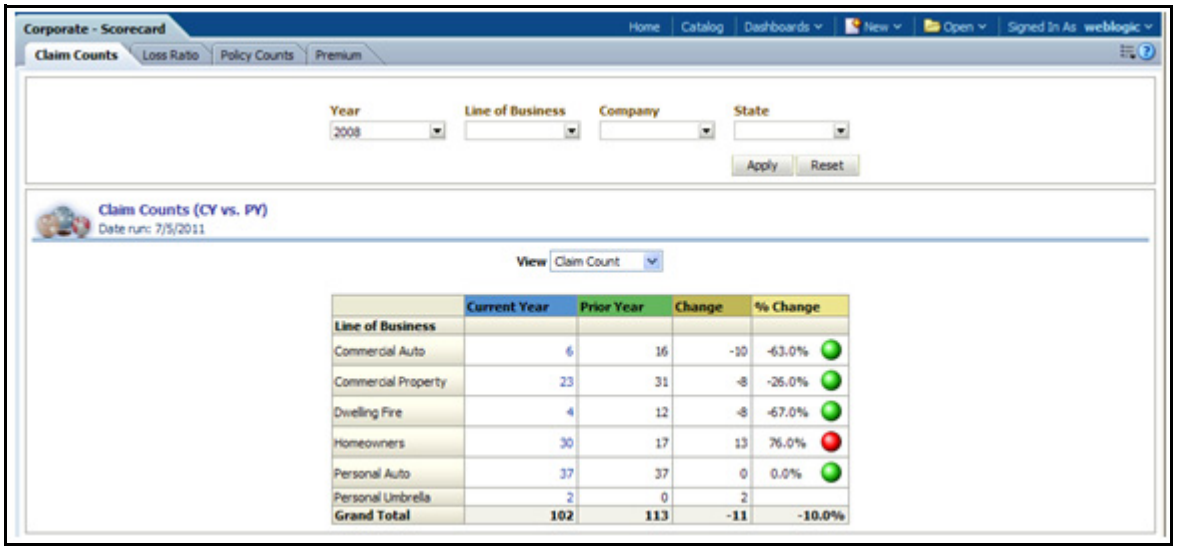


Figure 47: Claim Counts (Corporate)

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 lists.

- **Line of Business** – the name(s) of the Line of Business.
- **Company** – the name(s) of the company.
- **State** – the state or geopolitical area.

Step 3: Select the **Apply** 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

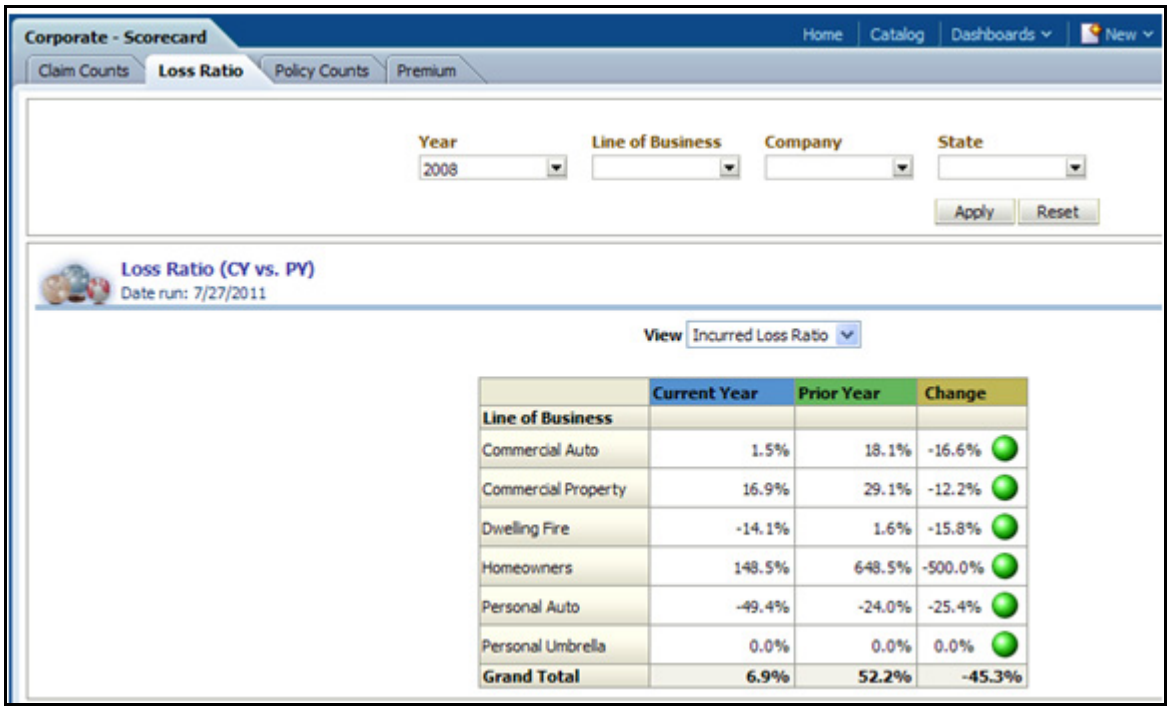


Figure 48: Loss Ratio (Corporate)

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 lists.

- **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 **Apply** 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

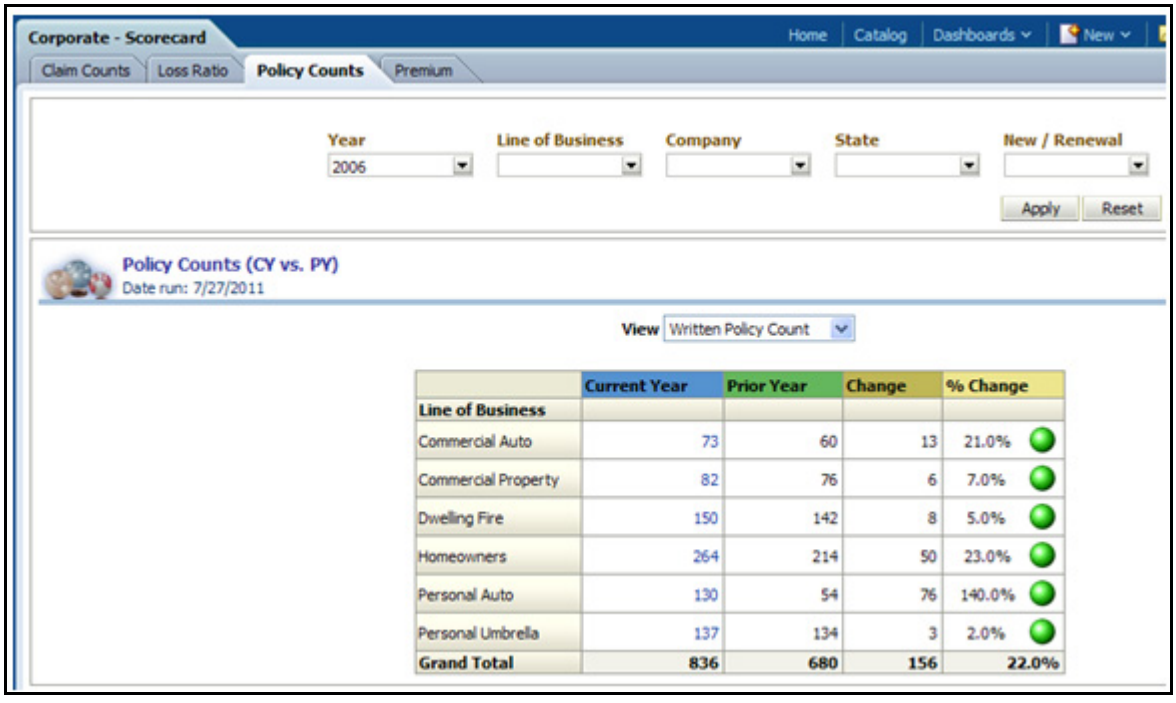


Figure 49: Policy Counts (Corporate)

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 lists.

- **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.
- **Currency Type** - the type of currency.

Step 3: Select the **Apply** 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

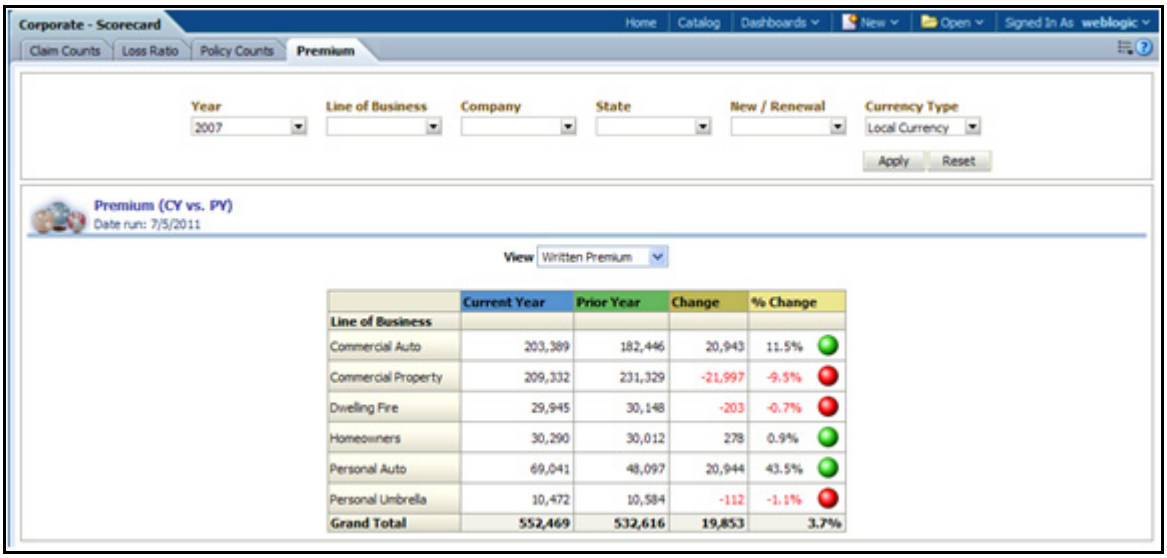


Figure 50: Premium (Corporate)

Chapter 4

Using the 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 1: 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 2: 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 graph and table format. The top section presents the results in a graph format while the bottom half shows the data in a table format.

The Analysis reports have the following features:

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

COLOR CODED GRAPHS AND TABLES

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

Figure 52: Color Coded graphs and Tables

ROLLOVER IN GRAPHS

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

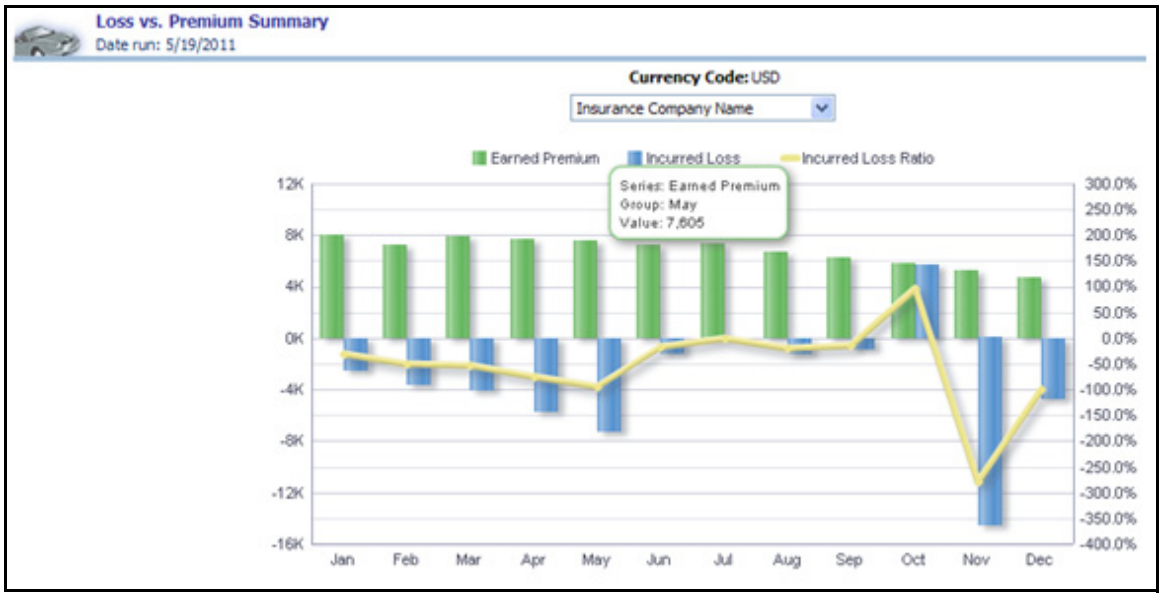


Figure 53: Rollover Feature in Graph

DISPLAYING 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.

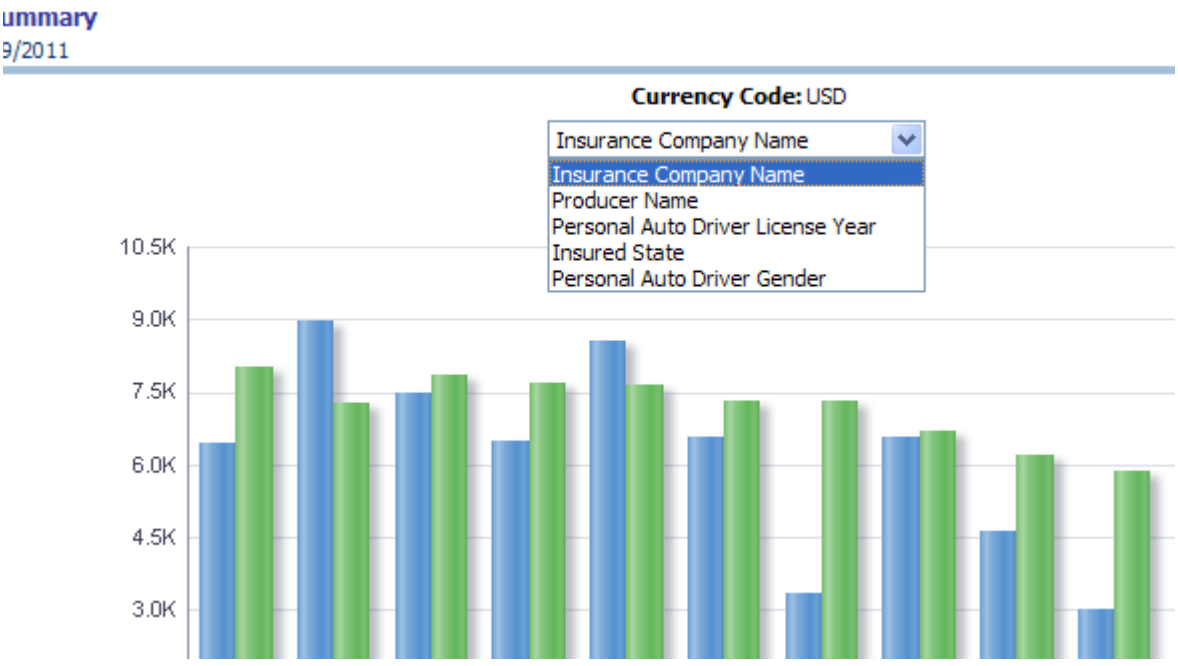


Figure 54: Drop-Down List

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*…

		Jan	Feb	Mar	Apr	May	Jun	Ju
	Insurance Company Name							
Written Premium	Abel Insurance	245	215	545	29	-109	0	
	Beverly Insurance	62	43	62	134	0	0	
	Cole Insurance	12	43	202	105	163	0	
Written Premium Total		**319**	**301**	**809**	**268**	**54**	**0**	
Earned Premium	Abel Insurance	282	280	262	288	256	86	
	Beverly Insurance	256	210	164	151	142	49	
	Cole Insurance	99	61	19	50	92	82	
Earned Premium Total		**637**	**551**	**444**	**490**	**490**	**217**	

…will now be organized by *Gender*:

		Jan	Feb	Mar	Apr	May	Jun
	Personal Auto Driver Gender						
Written Premium	F	154	128	656	177	155	0
	M	165	173	153	91	-101	0
Written Premium Total		**319**	**301**	**809**	**268**	**54**	**0**
Earned Premium	F	263	256	224	291	291	207
	M	374	295	220	199	199	9
Earned Premium Total		**637**	**551**	**444**	**490**	**490**	**217**

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.

						Jan	Feb	Mar	Apr	May
	Insured State	Insured City	Insured Postal Code	Insured District	Insured County					
Written Premium	Michigan	Port Huron	91699			173	440	512	303	581
Written Premium Total						**173**	**440**	**512**	**303**	**581**
Earned Premium	Michigan	Port Huron	91699			179	250	283	408	386
Earned Premium Total						**179**	**250**	**283**	**408**	**386**

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 lists:

- **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 **Apply** button. The results will appear on the lower half of the page.

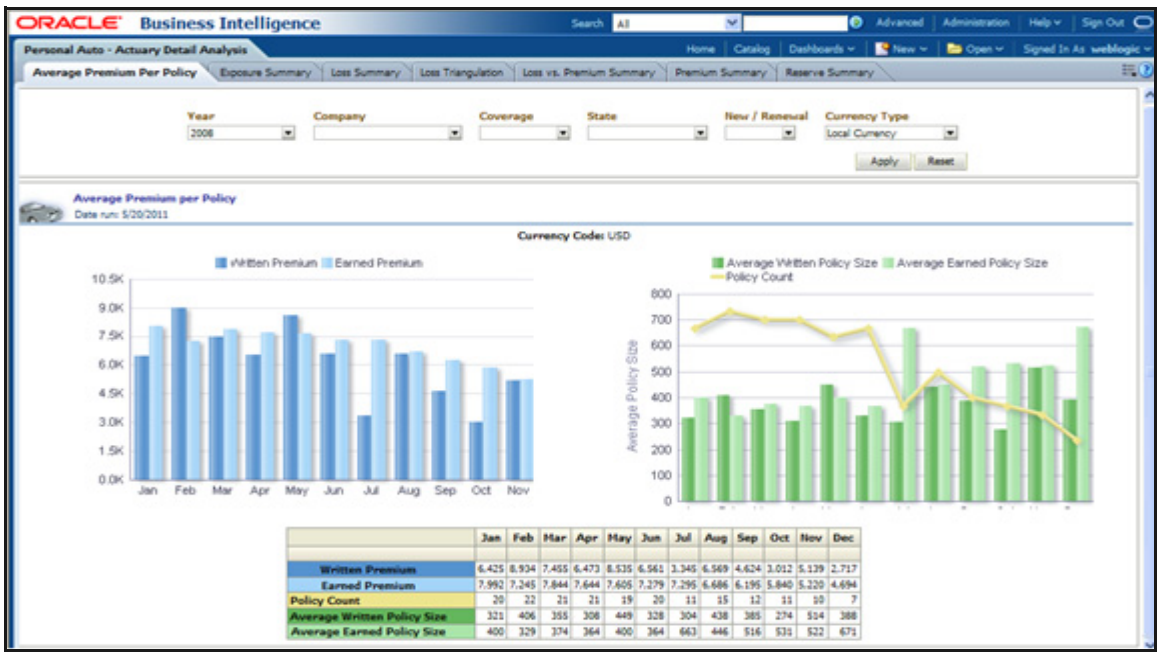


Figure 56: Average Premium per Policy (Personal Auto)

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.

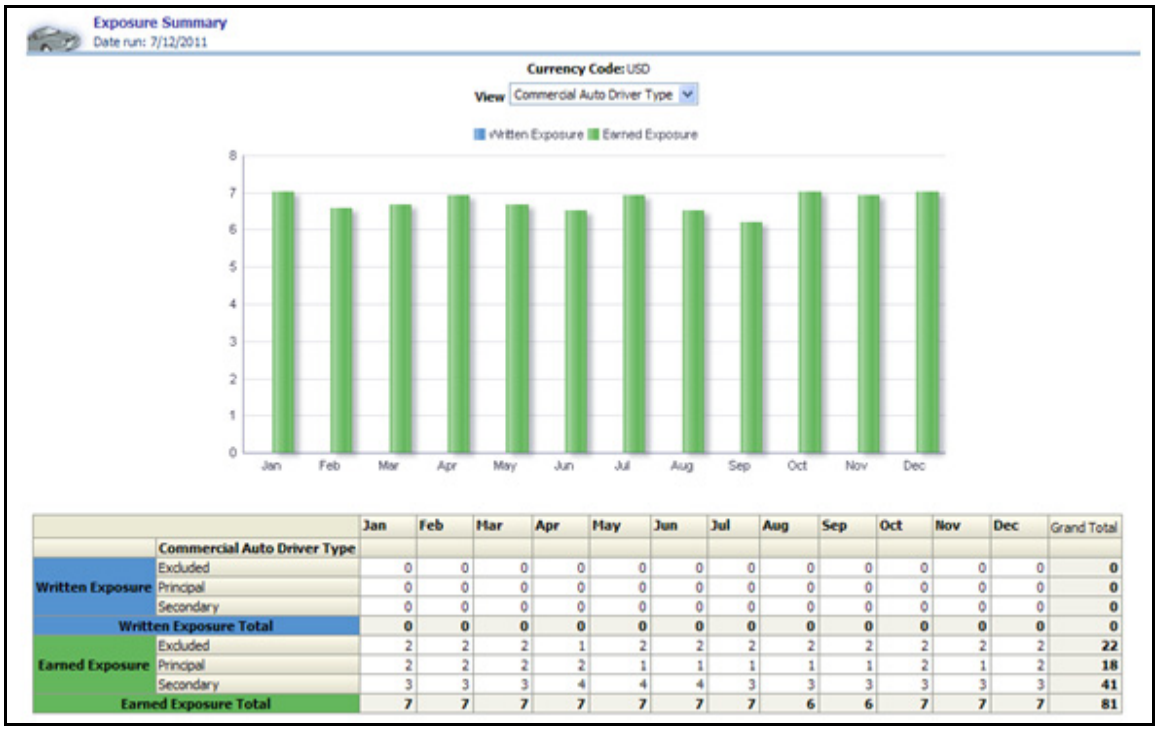
Step 1: Select a **Year** from the drop-down menu.

Step 2: Select the filters for the analysis from the appropriate choice lists:

- **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 **Apply** 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.



		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
	Commercial Auto Driver Type													
Written Exposure	Excluded	0	0	0	0	0	0	0	0	0	0	0	0	0
	Principal	0	0	0	0	0	0	0	0	0	0	0	0	0
	Secondary	0	0	0	0	0	0	0	0	0	0	0	0	0
Written Exposure Total		0	0	0	0	0	0	0	0	0	0	0	0	0
Earned Exposure	Excluded	2	2	2	1	2	2	2	2	2	2	2	2	22
	Principal	2	2	2	2	1	1	1	1	1	2	1	2	18
	Secondary	3	3	3	4	4	4	3	3	3	3	3	3	41
Earned Exposure Total		7	7	7	7	7	7	7	6	6	7	7	7	81

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.

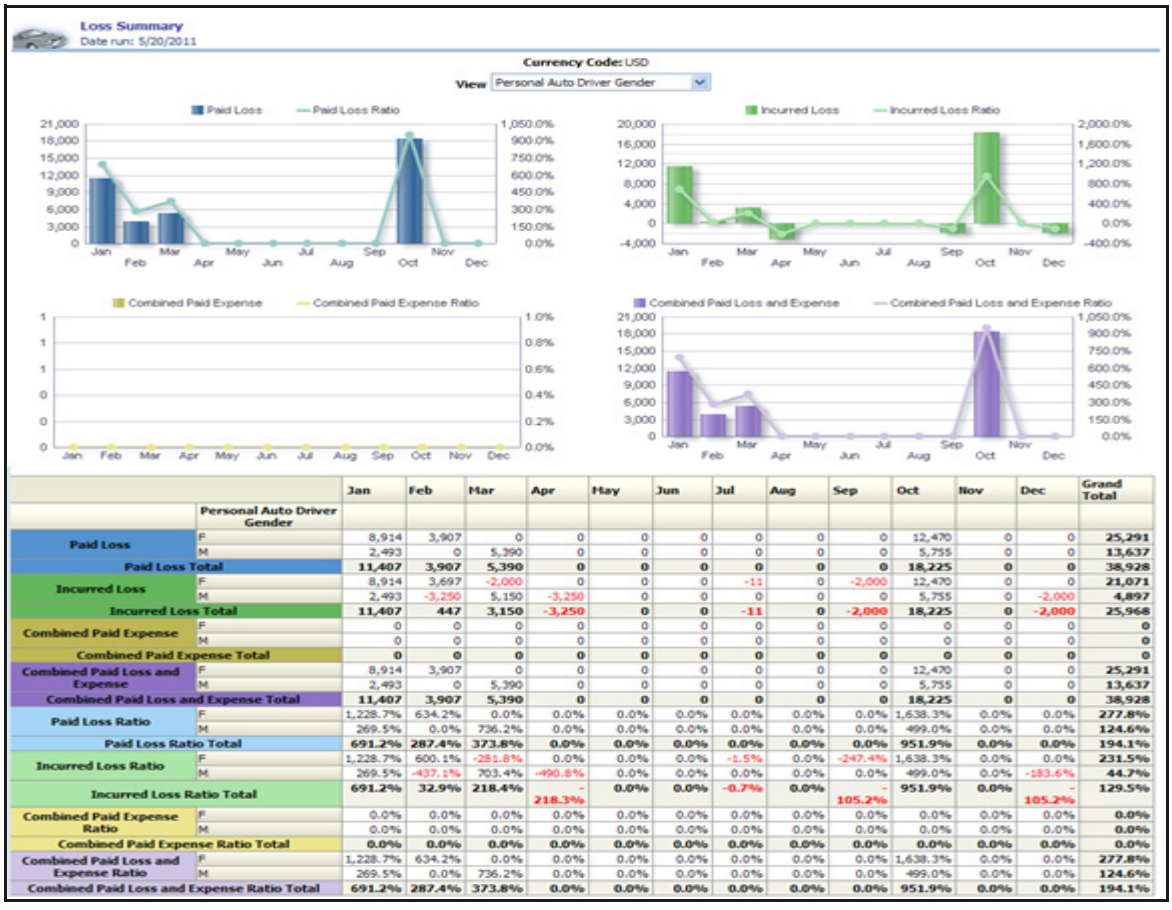
Step 1: Select a **Year** from the drop-down menu.

Step 2: Select the filters for the analysis from the appropriate choice lists:

- **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.
- **Currency Type** - the type of currency.

Step 3: Select the **Apply 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.



		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
Personal Auto Driver Gender														
Paid Loss	F	8,914	3,907	0	0	0	0	0	0	0	12,470	0	0	25,291
	M	2,493	0	5,390	0	0	0	0	0	0	5,755	0	0	13,637
Paid Loss Total		11,407	3,907	5,390	0	0	0	0	0	0	18,225	0	0	38,928
Incurred Loss	F	8,914	3,697	-2,000	0	0	0	-11	0	-2,000	12,470	0	0	21,071
	M	2,493	-3,250	5,150	-3,250	0	0	0	0	0	5,755	0	-2,000	4,897
Incurred Loss Total		11,407	447	3,150	-3,250	0	0	-11	0	-2,000	18,225	0	-2,000	25,968
Combined Paid Expense	F	0	0	0	0	0	0	0	0	0	0	0	0	0
	M	0	0	0	0	0	0	0	0	0	0	0	0	0
Combined Paid Expense Total		0	0	0	0	0	0	0	0	0	0	0	0	0
Combined Paid Loss and Expense	F	8,914	3,907	0	0	0	0	0	0	0	12,470	0	0	25,291
	M	2,493	0	5,390	0	0	0	0	0	0	5,755	0	0	13,637
Combined Paid Loss and Expense Total		11,407	3,907	5,390	0	0	0	0	0	0	18,225	0	0	38,928
Paid Loss Ratio	F	1,228.7%	634.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1,638.3%	0.0%	0.0%	277.8%
	M	269.5%	0.0%	736.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	499.0%	0.0%	0.0%	124.6%
Paid Loss Ratio Total		691.2%	287.4%	373.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	951.9%	0.0%	0.0%	194.1%
Incurred Loss Ratio	F	1,228.7%	600.1%	-281.8%	0.0%	0.0%	0.0%	-1.5%	0.0%	-247.4%	1,638.3%	0.0%	0.0%	231.5%
	M	269.5%	-437.1%	703.4%	-490.8%	0.0%	0.0%	0.0%	0.0%	0.0%	499.0%	0.0%	-183.6%	44.7%
Incurred Loss Ratio Total		691.2%	32.9%	218.4%	- 218.3%	0.0%	0.0%	-0.7%	0.0%	- 105.2%	951.9%	0.0%	- 105.2%	129.5%
Combined Paid Expense Ratio	F	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	M	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Combined Paid Expense Ratio Total		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Combined Paid Loss and Expense Ratio	F	1,228.7%	634.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1,638.3%	0.0%	0.0%	277.8%
	M	269.5%	0.0%	736.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	499.0%	0.0%	0.0%	124.6%
Combined Paid Loss and Expense Ratio Total		691.2%	287.4%	373.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	951.9%	0.0%	0.0%	194.1%

Figure 58: Loss Summary (Personal Auto)

Loss Triangulation

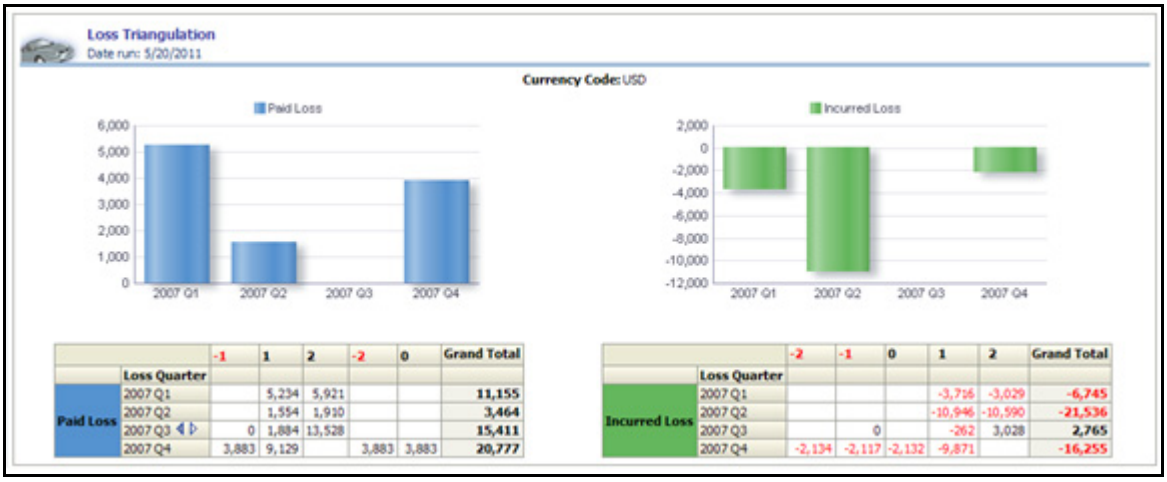
The Loss Triangulation analysis shows a quarterly breakdown of Paid Loss and Incurred Loss amounts and their totals for a specific year.

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

Step 2: Select the filters for the analysis from the appropriate choice lists:

- **Loss Year -** the year in which the loss takes place.
- **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.
- **Currency Type** - the type of currency.

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



		-1	1	2	-2	0	Grand Total
	Loss Quarter						
Paid Loss	2007 Q1		5,234	5,921			11,155
	2007 Q2		1,554	1,910			3,464
	2007 Q3	0	1,884	13,528			15,411
	2007 Q4	3,883	9,129		3,883	3,883	20,777

		-2	-1	0	1	2	Grand Total
	Loss Quarter						
Incurred Loss	2007 Q1				-3,716	-3,029	-6,745
	2007 Q2				-10,946	-10,590	-21,536
	2007 Q3			0	-262	3,028	2,765
	2007 Q4	-2,134	-2,117	-2,132	-9,871		-16,255

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.

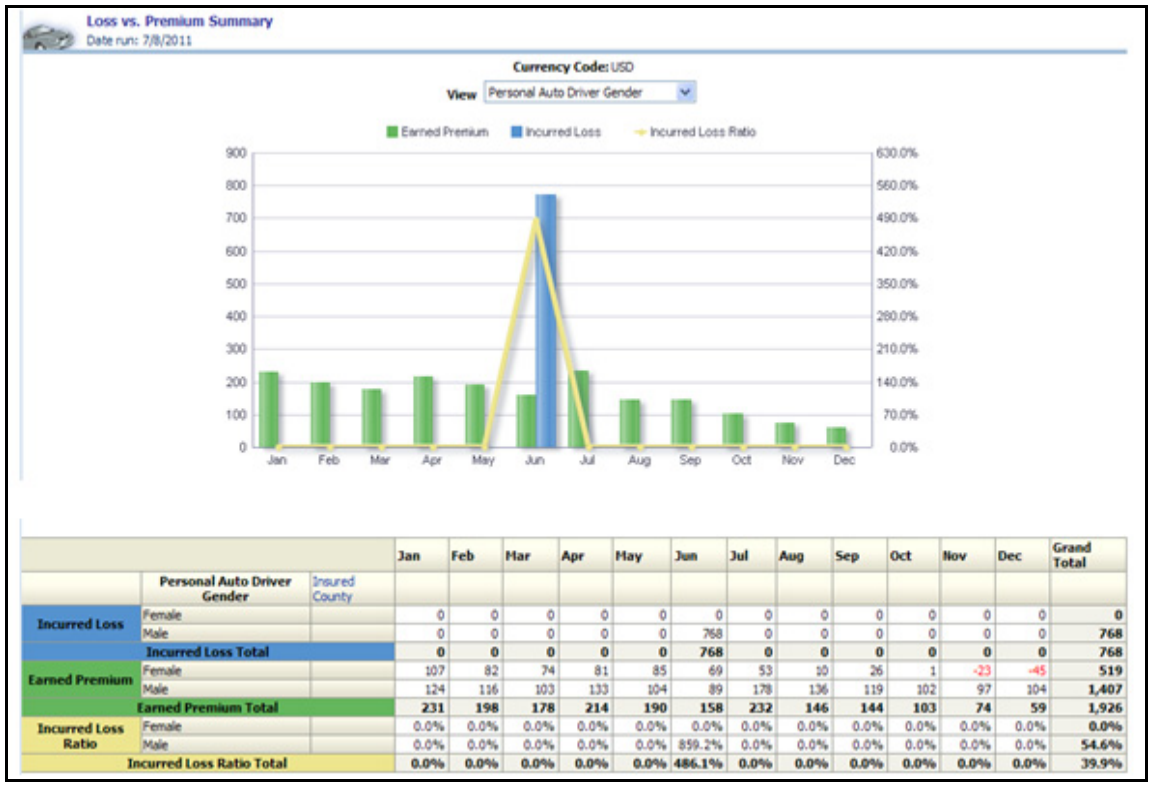
Step 1: Select a **Year** from the drop-down menu.

Step 2: Select the filters for the analysis from the appropriate choice lists:

- **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.
- **Currency Type** - the type of currency.

Step 3: Select the **Apply** 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.



	Personal Auto Driver Gender	Insured County	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
Incurred Loss	Female		0	0	0	0	0	0	0	0	0	0	0	0	0
	Male		0	0	0	0	0	768	0	0	0	0	0	0	768
Incurred Loss Total			0	0	0	0	0	768	0	0	0	0	0	0	768
Earned Premium	Female		107	82	74	81	85	69	53	10	26	1	-23	-45	519
	Male		124	116	103	133	104	89	178	136	119	102	97	104	1,407
Earned Premium Total			231	198	178	214	190	158	232	146	144	103	74	59	1,926
Incurred Loss Ratio	Female		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Male		0.0%	0.0%	0.0%	0.0%	0.0%	859.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	54.6%
Incurred Loss Ratio Total			0.0%	0.0%	0.0%	0.0%	0.0%	486.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	39.9%

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.

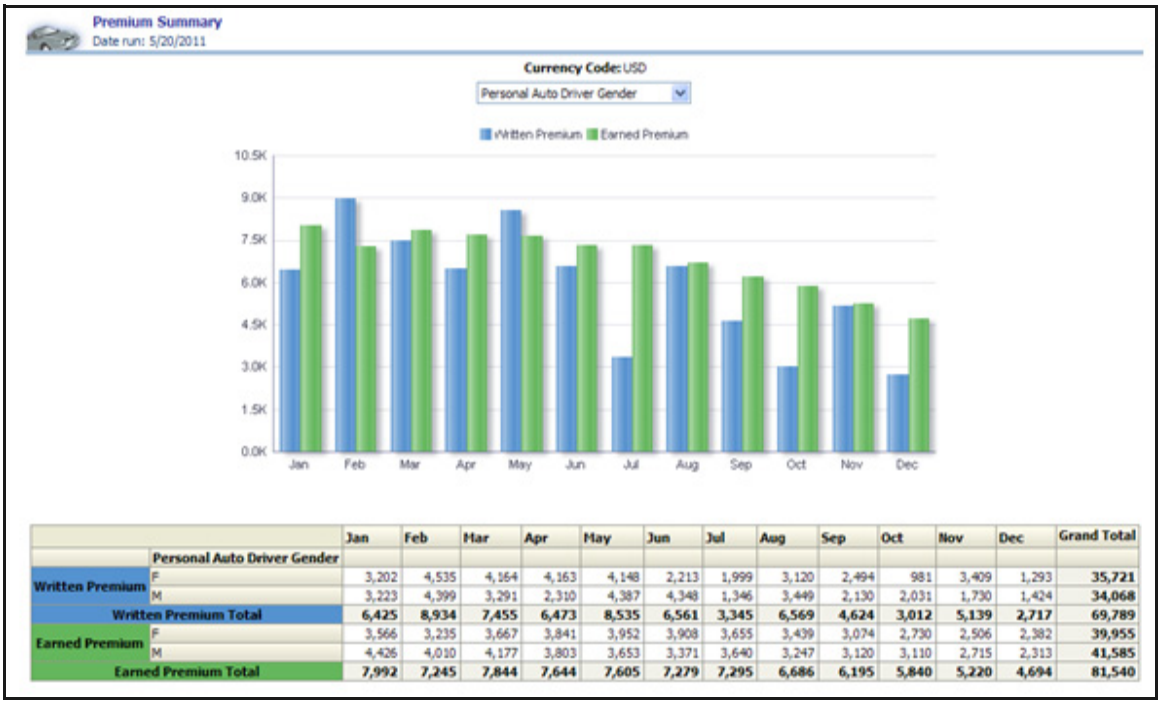
Step 1: Select a **Year** from the drop-down menu.

Step 2: Select the filters for the analysis from the appropriate choice lists:

- **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 **Apply** 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.



	Personal Auto Driver Gender	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
Written Premium	F	3,202	4,535	4,164	4,163	4,148	2,213	1,999	3,120	2,494	981	3,409	1,293	**35,721**
	M	3,223	4,399	3,291	2,310	4,387	4,348	1,346	3,449	2,130	2,031	1,730	1,424	**34,068**
Written Premium Total		**6,425**	**8,934**	**7,455**	**6,473**	**8,535**	**6,561**	**3,345**	**6,569**	**4,624**	**3,012**	**5,139**	**2,717**	**69,789**
Earned Premium	F	3,566	3,235	3,667	3,841	3,952	3,908	3,655	3,439	3,074	2,730	2,506	2,382	**39,955**
	M	4,426	4,010	4,177	3,803	3,653	3,371	3,640	3,247	3,120	3,110	2,715	2,313	**41,585**
Earned Premium Total		**7,992**	**7,245**	**7,844**	**7,644**	**7,605**	**7,279**	**7,295**	**6,686**	**6,195**	**5,840**	**5,220**	**4,694**	**81,540**

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.

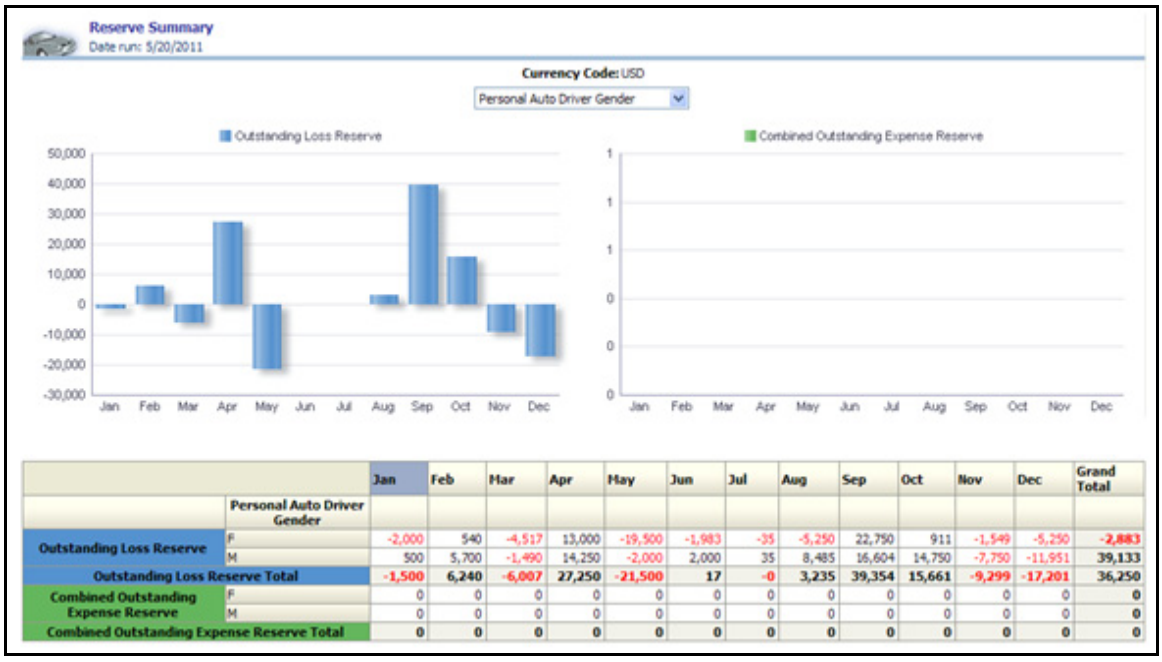
Step 1: Select a **Year** from the drop-down menu.

Step 2: Select the filters for the analysis from the appropriate choice lists:

- **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.
- **Currency Type** - the type of currency.

Step 3: Select the **Apply** 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.



	Personal Auto Driver Gender	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
Outstanding Loss Reserve	F	-2,000	540	-4,517	13,000	-19,500	-1,983	-35	-5,250	22,750	911	-1,549	-5,250	-2,883
	M	500	5,700	-1,490	14,250	-2,000	2,000	35	8,485	16,604	14,750	-7,750	-11,951	39,133
Outstanding Loss Reserve Total		-1,500	6,240	-6,007	27,250	-21,500	17	-0	3,235	39,354	15,661	-9,299	-17,201	36,250
Combined Outstanding Expense Reserve	F	0	0	0	0	0	0	0	0	0	0	0	0	0
	M	0	0	0	0	0	0	0	0	0	0	0	0	0
Combined Outstanding Expense Reserve Total		0	0	0	0	0	0	0	0	0	0	0	0	0

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

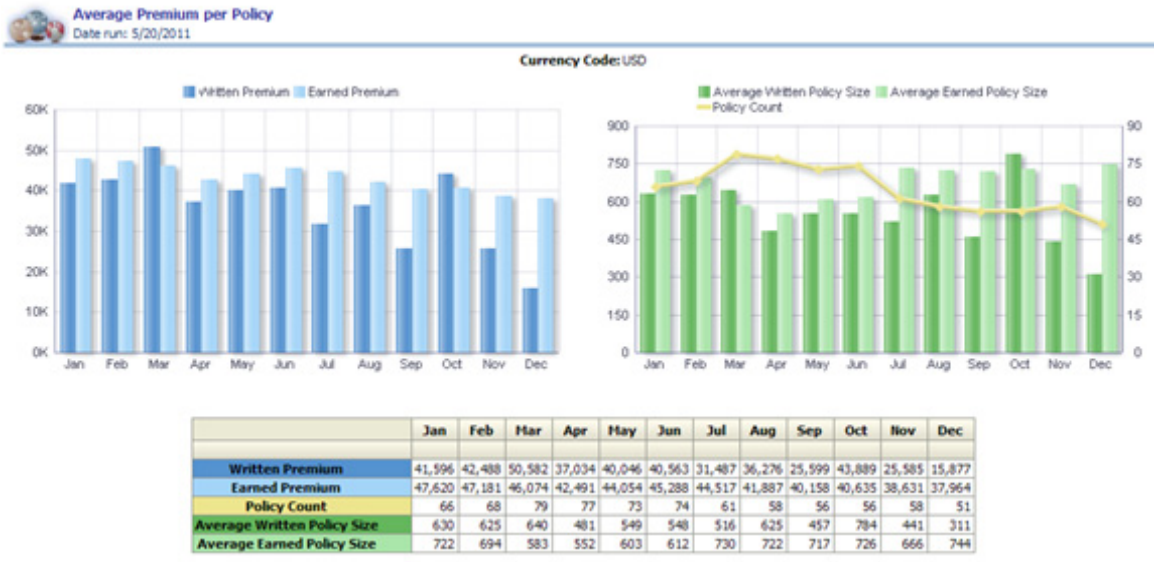
The Average Premium per Policy analysis shows the written premium, earned premium, policy count average written policy size, and average earned policy size across twelve months of a specific year.

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

Step 2: Select the filters for the analysis from the appropriate choice lists:

- **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.
- **Currency Type** - the type of currency.

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



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Written Premium	41,596	42,488	50,582	37,034	40,046	40,563	31,487	36,276	25,599	43,889	25,585	15,877
Earned Premium	47,620	47,181	46,074	42,491	44,054	45,288	44,517	41,887	40,158	40,635	38,631	37,964
Policy Count	66	68	79	77	73	74	61	58	56	56	58	51
Average Written Policy Size	630	625	640	481	549	548	516	625	457	784	441	311
Average Earned Policy Size	722	694	583	552	603	612	730	722	717	726	666	744

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.

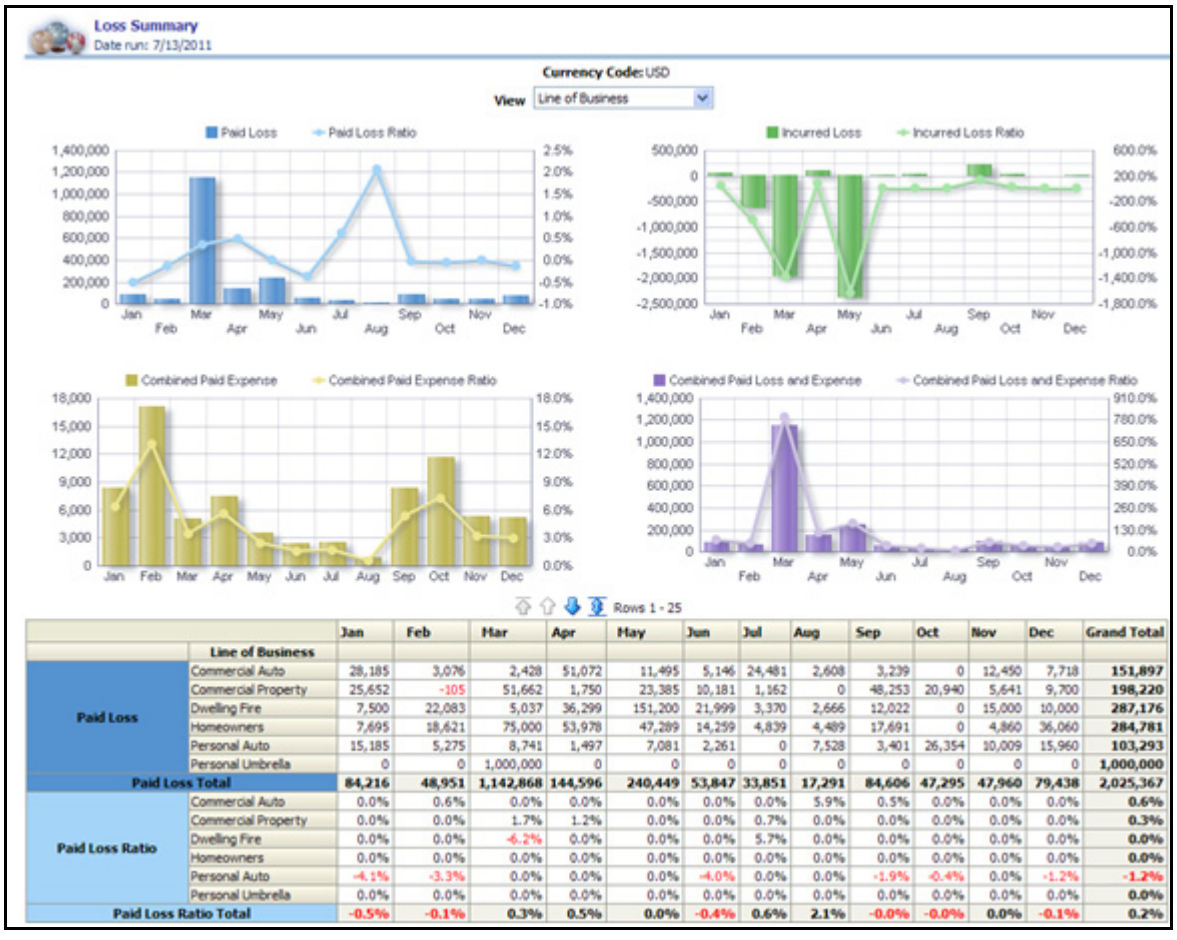
Step 1: Select a **Year** from the drop-down menu.

Step 2: Select the filters for the analysis from the appropriate choice lists:

- **Line of Business** – the name(s) of the Line of Business.
- **Company** – the name(s) of the company.
- **State** – the state or geopolitical area.
- **Currency Type** - the type of currency.

Step 3: Select the **Apply** 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.



	Line of Business	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
Paid Loss	Commercial Auto	28,185	3,076	2,428	51,072	11,495	5,146	24,481	2,608	3,239	0	12,450	7,718	151,897
	Commercial Property	25,652	-105	51,662	1,750	23,385	10,181	1,162	0	48,253	20,940	5,641	9,700	198,220
	Dwelling Fire	7,500	22,083	5,037	36,299	151,200	21,999	3,370	2,666	12,022	0	15,000	10,000	287,176
	Homeowners	7,695	18,621	75,000	53,978	47,289	14,259	4,839	4,489	17,691	0	4,860	36,060	284,781
	Personal Auto	15,185	5,275	8,741	1,497	7,081	2,261	0	7,528	3,401	26,354	10,009	15,960	103,293
	Personal Umbrella	0	0	1,000,000	0	0	0	0	0	0	0	0	0	1,000,000
Paid Loss Total		84,216	48,951	1,142,868	144,596	240,449	53,847	33,851	17,291	84,606	47,295	47,960	79,438	2,025,367
Paid Loss Ratio	Commercial Auto	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%	0.5%	0.0%	0.0%	0.0%	0.6%
	Commercial Property	0.0%	0.0%	1.7%	1.2%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
	Dwelling Fire	0.0%	0.0%	-6.2%	0.0%	0.0%	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homeowners	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Personal Auto	-4.1%	-3.3%	0.0%	0.0%	0.0%	-4.0%	0.0%	0.0%	-1.9%	-0.4%	0.0%	-1.2%	-1.2%
	Personal Umbrella	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Paid Loss Ratio Total		-0.5%	-0.1%	0.3%	0.5%	0.0%	-0.4%	0.6%	2.1%	-0.0%	-0.0%	0.0%	-0.1%	0.2%

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.

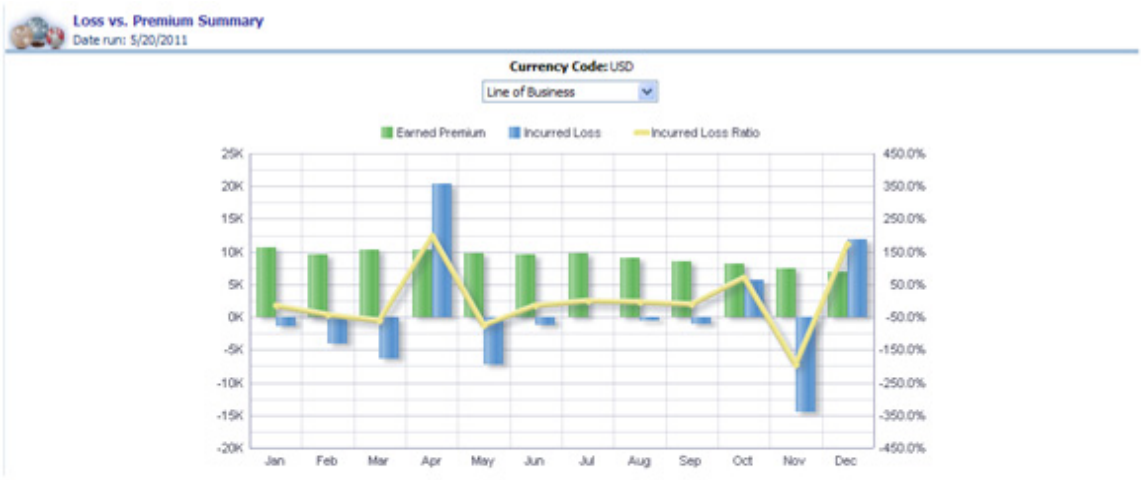
Step 1: Select a **Year** from the drop-down menu.

Step 2: Select the filters for the analysis from the appropriate choice lists:

- **Line of Business** – the name(s) of the Line of Business.
- **Company** – the name(s) of the company.
- **State** – the state or geopolitical area.
- **Currency Type** - the type of currency.

Step 3: Select the **Apply** 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.



		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
	Line of Business													
Incurred Loss	HOME	1,236	-303	-2,300	26,000	0	0	0	795	-100	0	0	16,594	41,922
	PA	-2,551	-3,673	-4,050	-5,751	-7,250	-1,215	-0	-1,265	-887	5,672	-14,571	-4,714	-40,255
Incurred Loss Total		-1,315	-3,976	-6,350	20,249	-7,250	-1,215	-0	-470	-987	5,672	-14,571	11,880	1,667
Earned Premium	HOME	2,536	2,311	2,491	2,583	2,196	2,324	2,393	2,364	2,238	2,335	2,237	2,223	28,228
	PA	7,992	7,245	7,844	7,644	7,605	7,279	7,295	6,686	6,195	5,840	5,220	4,694	81,540
Earned Premium Total		10,528	9,556	10,334	10,227	9,801	9,602	9,688	9,049	8,432	8,175	7,457	6,918	109,768
Incurred Loss Ratio	HOME	48.7%	-13.1%	-92.4%	1,006.5%	0.0%	0.0%	0.0%	33.6%	-4.5%	0.0%	0.0%	746.4%	148.5%
	PA	-31.9%	-50.7%	-51.6%	-75.2%	-95.3%	-16.7%	-0.0%	-18.9%	-14.3%	97.1%	-279.1%	-100.4%	-49.4%
Incurred Loss Ratio Total		-12.5%	-41.6%	-61.4%	198.0%	-74.0%	-12.7%	-0.0%	-5.2%	-11.7%	69.4%	-195.4%	171.7%	1.5%

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.

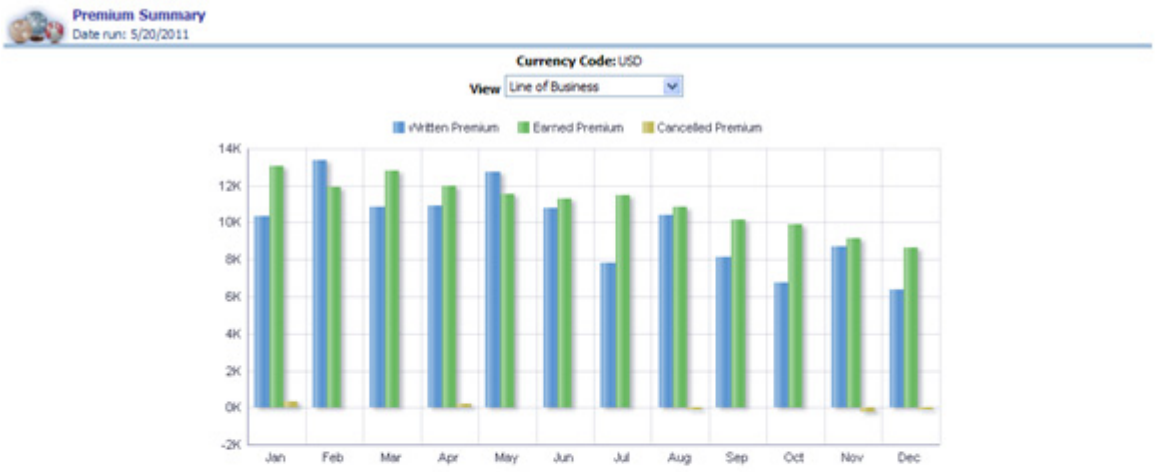
Step 1: Select a **Year** from the drop-down menu.

Step 2: Select the filters for the analysis from the appropriate choice lists:

- **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.
- **Currency Type** - the type of currency.

Step 3: Select the **Apply** 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.



	Line of Business	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
Written Premium	DFIRE	1,803	1,858	842	1,850	1,301	1,957	1,886	1,940	1,365	1,829	1,507	1,710	**19,848**
	HOME	2,085	2,506	2,536	2,537	2,863	2,209	2,562	1,889	2,122	1,869	2,031	1,924	**27,133**
	PA	6,425	8,934	7,455	6,473	8,535	6,561	3,345	6,569	4,624	3,012	5,139	2,717	**69,789**
Written Premium Total		**10,313**	**13,298**	**10,833**	**10,860**	**12,699**	**10,727**	**7,793**	**10,398**	**8,111**	**6,710**	**8,677**	**6,351**	**116,770**
Earned Premium	DFIRE	2,504	2,336	2,434	1,700	1,728	1,675	1,737	1,738	1,662	1,683	1,632	1,690	**22,518**
	HOME	2,536	2,311	2,491	2,583	2,196	2,324	2,393	2,364	2,238	2,335	2,237	2,223	**28,228**
	PA	7,992	7,245	7,844	7,644	7,605	7,279	7,295	6,686	6,195	5,840	5,220	4,694	**81,540**
Earned Premium Total		**13,032**	**11,892**	**12,769**	**11,927**	**11,529**	**11,277**	**11,425**	**10,787**	**10,094**	**9,858**	**9,089**	**8,607**	**132,286**
Cancelled Premium	DFIRE	303	0	0	0	0	0	0	0	0	0	0	0	**303**
	HOME	0	0	0	230	0	0	0	0	0	0	-243	-86	**-99**
	PA	0	0	0	0	0	0	0	-99	0	0	0	0	**-99**
Cancelled Premium Total		**303**	**0**	**0**	**230**	**0**	**0**	**0**	**-99**	**0**	**0**	**-243**	**-86**	**105**

Figure 66: Premium Summary (Corporate)

Chapter 5

Using the Reports Dashboard

The Reports Dashboard can be accessed by **Dashboard>Reports** 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.

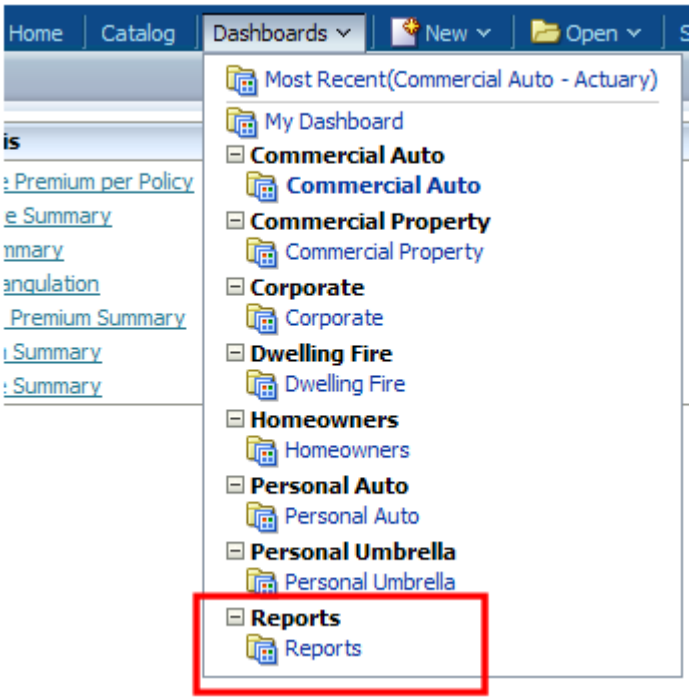


Figure 67: Select Dashboard>Reports to Open the Reports Dashboard

Executive Reports

The Executive reports are broken down into four subcategories:

- Business Indicator
- Executive Summary
- State Analysis

- New and Renewal Analysis

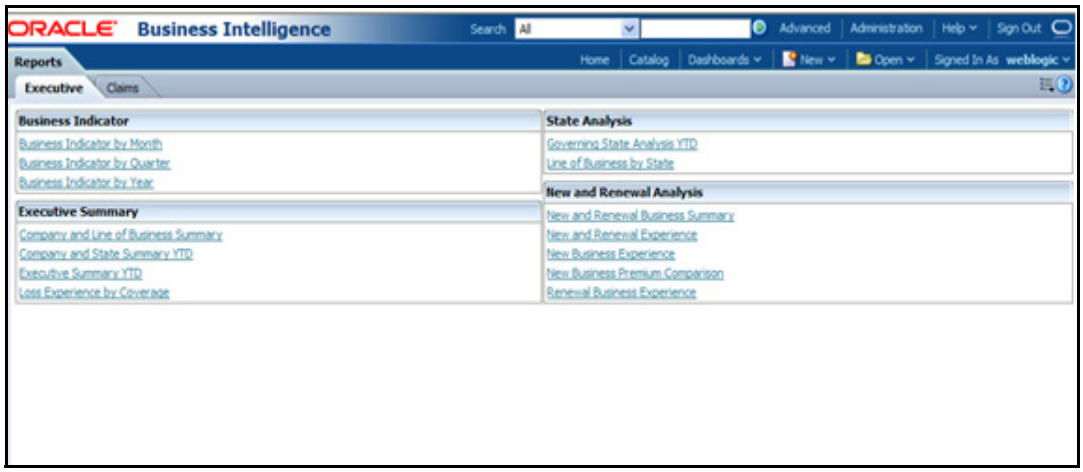


Figure 68: Executive Reports

Claims Reports

The claims reports are divided into the following categories:

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

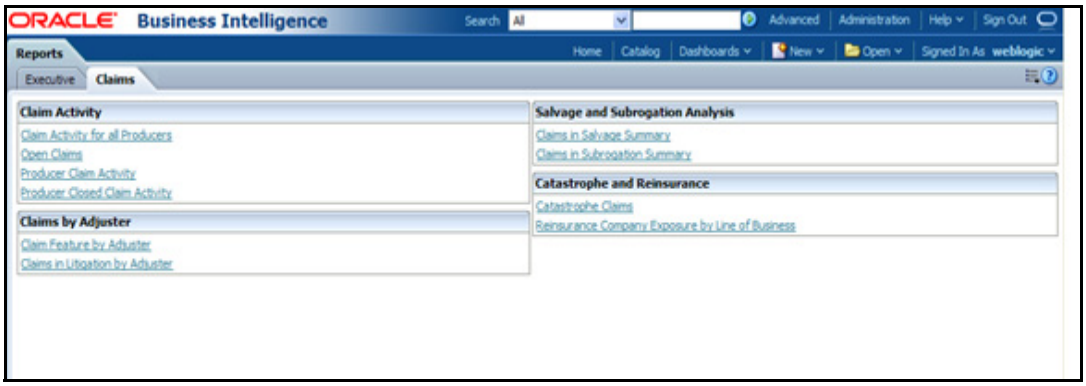


Figure 69: Claims Reports

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.

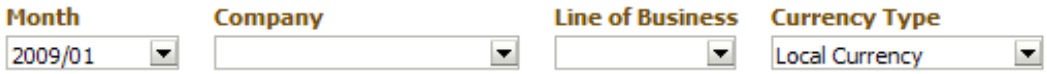


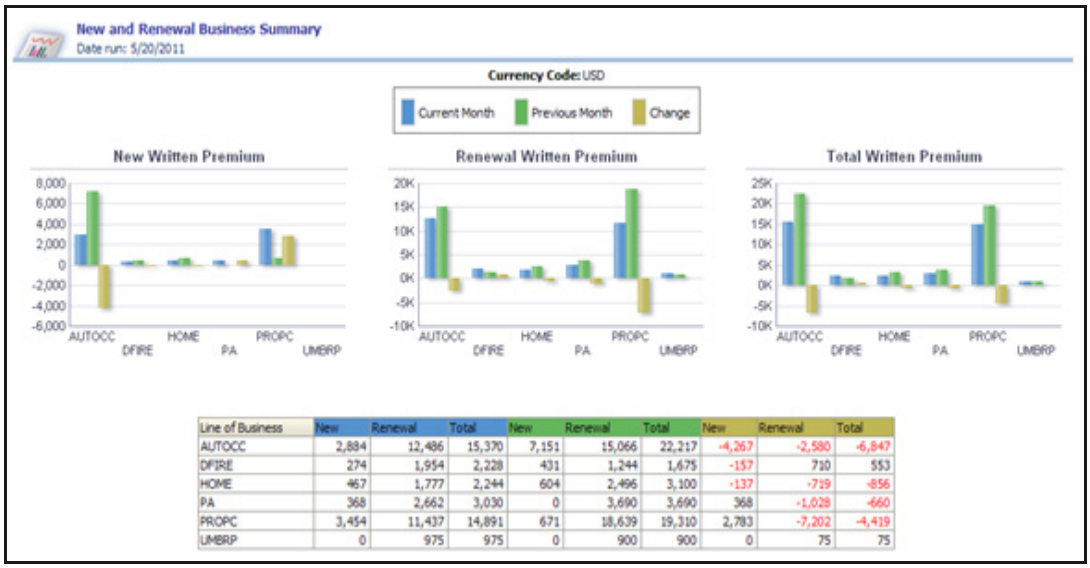
Figure 70: Report Prompts

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 displays the results in both tables and graphs.



Line of Business	New	Renewal	Total	New	Renewal	Total	New	Renewal	Total
AUTOCC	2,884	12,486	15,370	7,151	15,066	22,217	-4,267	-2,580	-6,847
DFIRE	274	1,954	2,228	431	1,244	1,675	-157	710	553
HOME	467	1,777	2,244	604	2,496	3,100	-137	-719	-856
PA	368	2,662	3,030	0	3,690	3,690	368	-1,028	-660
PROPC	3,454	11,437	14,891	671	18,639	19,310	2,783	-7,202	-4,419
UMBRP	0	975	975	0	900	900	0	75	75

Figure 71: 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: Company name

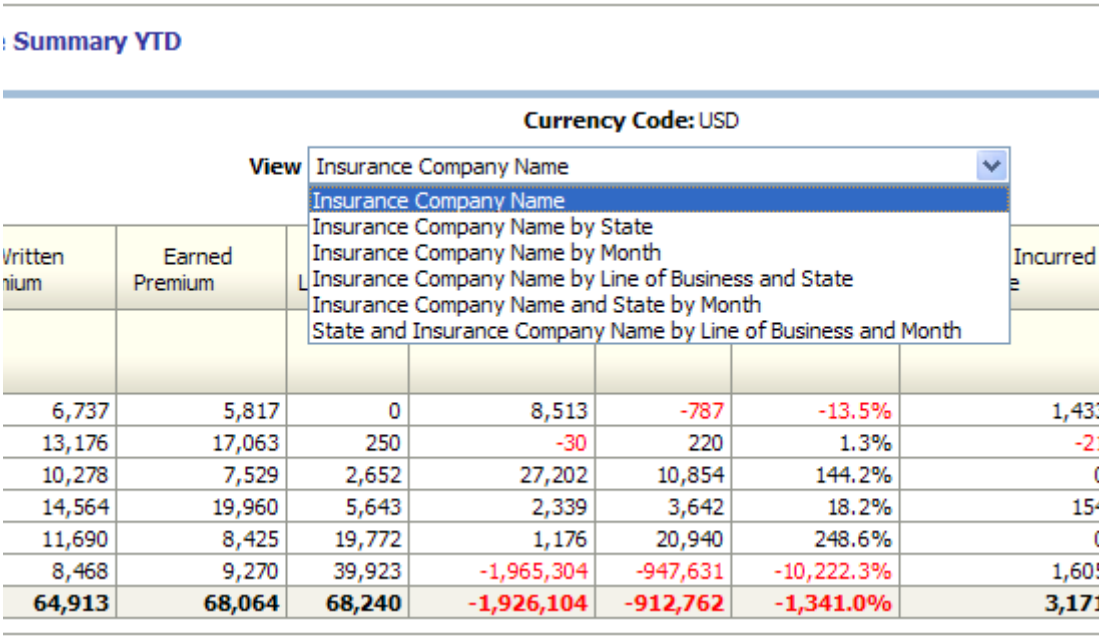
Currency Code: USD

	Current Month					Previous Month					% Change				
Company name	Average New Written Premium	New Written Premium Policy Count	Average Inforce Premium	Retained %	Cancelled / Non-Renewed %	Average New Written Premium	New Written Premium Policy Count	Average Inforce Premium	Retained %	Cancelled / Non-Renewed %	Average New Written Premium	New Written Premium 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 72: Business Indicatory by Month 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.



Summary YTD

Currency Code: USD

View Insurance Company Name

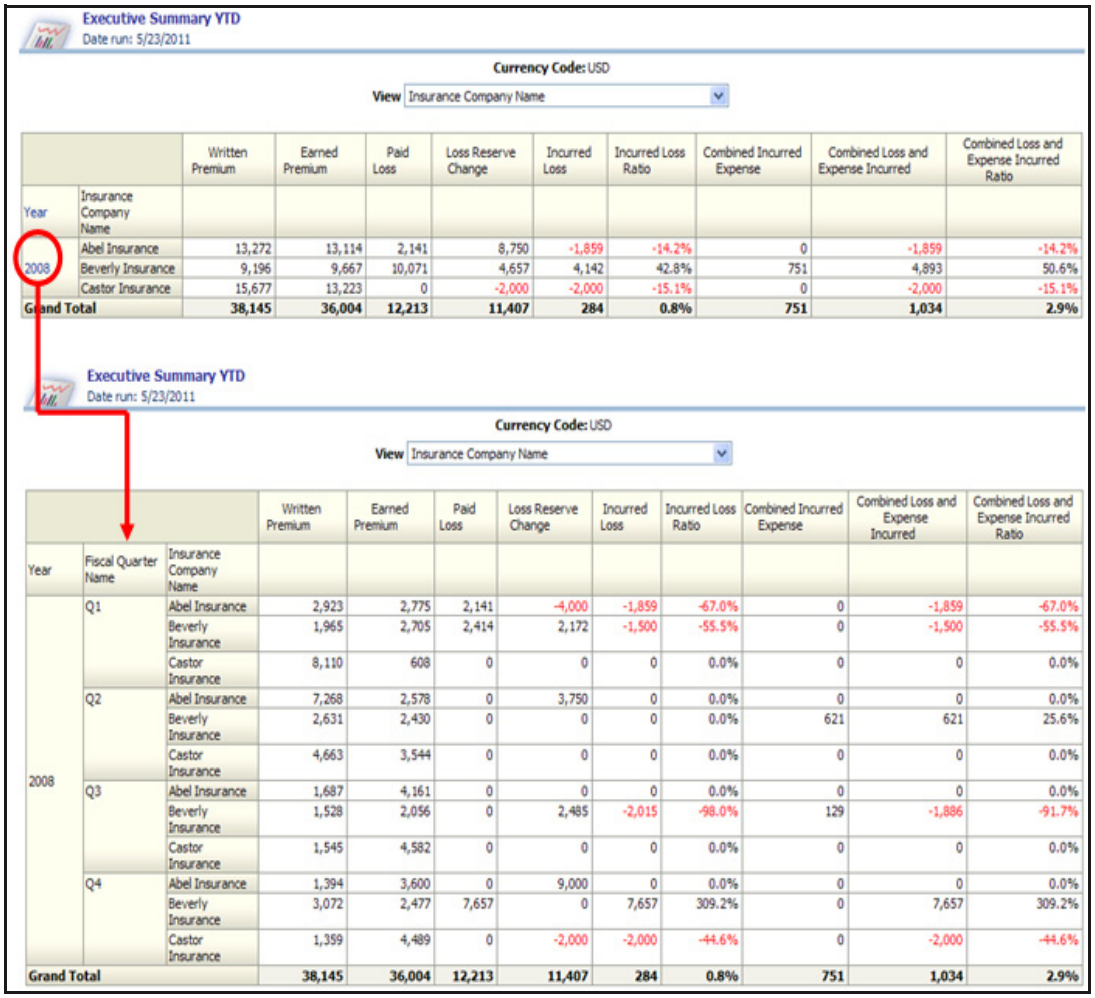
- Insurance Company Name
- Insurance Company Name by State
- Insurance Company Name by Month
- Insurance Company Name by Line of Business and State
- Insurance Company Name and State by Month
- State and Insurance Company Name by Line of Business and Month

Written ium	Earned Premium	L				Incurred e
6,737	5,817	0	8,513	-787	-13.5%	1,43
13,176	17,063	250	-30	220	1.3%	-2
10,278	7,529	2,652	27,202	10,854	144.2%	
14,564	19,960	5,643	2,339	3,642	18.2%	15
11,690	8,425	19,772	1,176	20,940	248.6%	
8,468	9,270	39,923	-1,965,304	-947,631	-10,222.3%	1,60
64,913	**68,064**	**68,240**	**-1,926,104**	**-912,762**	**-1,341.0%**	**3,17**

Figure 73: Sort Results by View

Drill Down on Year

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: 5/23/2011

Currency Code: USD

View: Insurance Company Name

Year	Insurance Company Name	Written Premium	Earned Premium	Paid Loss	Loss Reserve Change	Incurred Loss	Incurred Loss Ratio	Combined Incurred Expense	Combined Loss and Expense Incurred	Combined Loss and Expense Incurred Ratio
2008	Abel Insurance	13,272	13,114	2,141	8,750	-1,859	-14.2%	0	-1,859	-14.2%
	Beverly Insurance	9,196	9,667	10,071	4,657	4,142	42.8%	751	4,893	50.6%
	Castor Insurance	15,677	13,223	0	-2,000	-2,000	-15.1%	0	-2,000	-15.1%
Grand Total		**38,145**	**36,004**	**12,213**	**11,407**	**284**	**0.8%**	**751**	**1,034**	**2.9%**

Executive Summary YTD
Date run: 5/23/2011

Currency Code: USD

View: Insurance Company Name

Year	Fiscal Quarter Name	Insurance Company Name	Written Premium	Earned Premium	Paid Loss	Loss Reserve Change	Incurred Loss	Incurred Loss Ratio	Combined Incurred Expense	Combined Loss and Expense Incurred	Combined Loss and Expense Incurred Ratio
2008	Q1	Abel Insurance	2,923	2,775	2,141	-4,000	-1,859	-67.0%	0	-1,859	-67.0%
		Beverly Insurance	1,965	2,705	2,414	2,172	-1,500	-55.5%	0	-1,500	-55.5%
		Castor Insurance	8,110	608	0	0	0	0.0%	0	0	0.0%
	Q2	Abel Insurance	7,268	2,578	0	3,750	0	0.0%	0	0	0.0%
		Beverly Insurance	2,631	2,430	0	0	0	0.0%	621	621	25.6%
		Castor Insurance	4,663	3,544	0	0	0	0.0%	0	0	0.0%
	Q3	Abel Insurance	1,687	4,161	0	0	0	0.0%	0	0	0.0%
		Beverly Insurance	1,528	2,056	0	2,485	-2,015	-98.0%	129	-1,886	-91.7%
		Castor Insurance	1,545	4,582	0	0	0	0.0%	0	0	0.0%
	Q4	Abel Insurance	1,394	3,600	0	9,000	0	0.0%	0	0	0.0%
		Beverly Insurance	3,072	2,477	7,657	0	7,657	309.2%	0	7,657	309.2%
		Castor Insurance	1,359	4,489	0	-2,000	-2,000	-44.6%	0	-2,000	-44.6%
Grand Total			**38,145**	**36,004**	**12,213**	**11,407**	**284**	**0.8%**	**751**	**1,034**	**2.9%**

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.

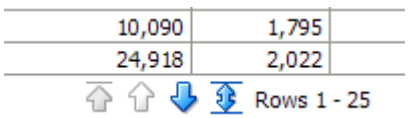


Figure 75: Navigate a Report

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 6

Using the Answers Tool

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 *analyses*, 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 analyses.

This chapter will not cover all of the functionality available in the Answers. For a comprehensive description of Answers, please refer to the *User's Guide for Oracle Business Intelligence Enterprise Edition*.

To access Answers:

1. From the menu, click **New**. The following list of options opens.

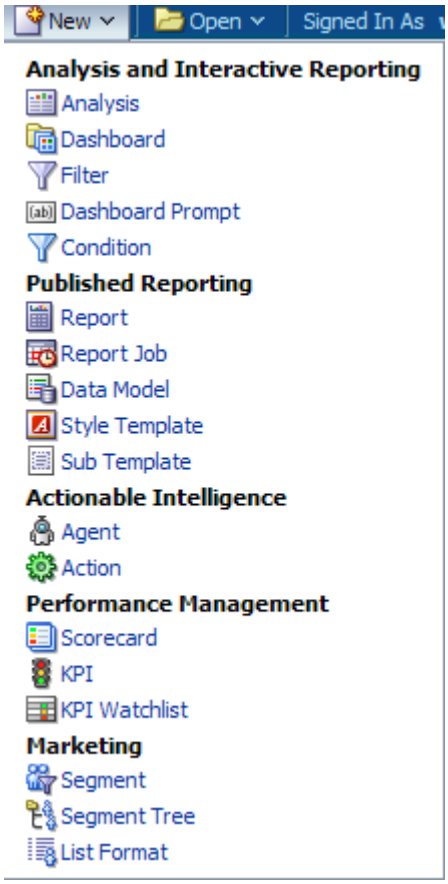


Figure 76: List of Available Options

2. Select **Analysis**. The Select Subject Area list opens.

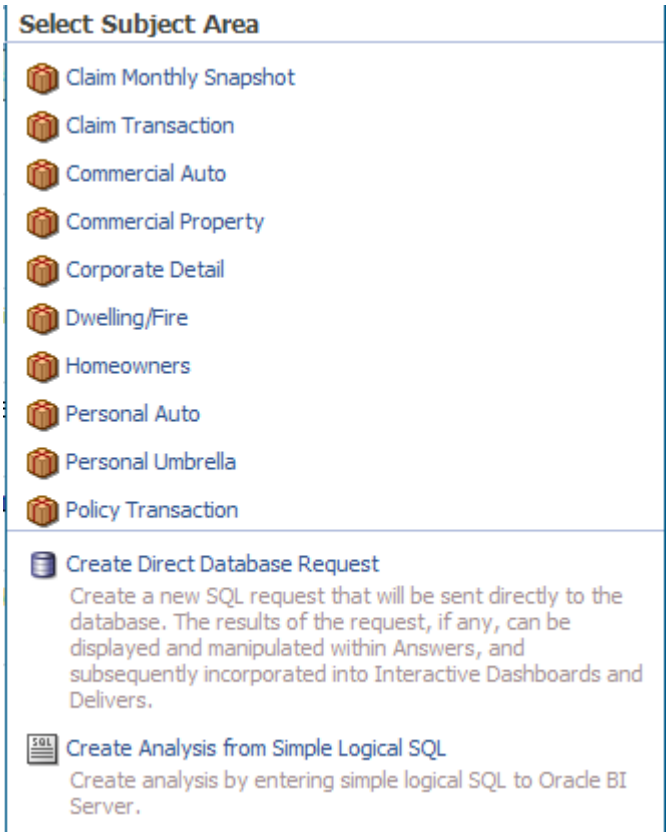


Figure 77: Select Subject Areas

This is a list 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 analyses.

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 analyses directly to a physical back-end database.

The discussion of direct database analyses 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.*

3. Click on a Subject Area. The Analysis Editor opens.

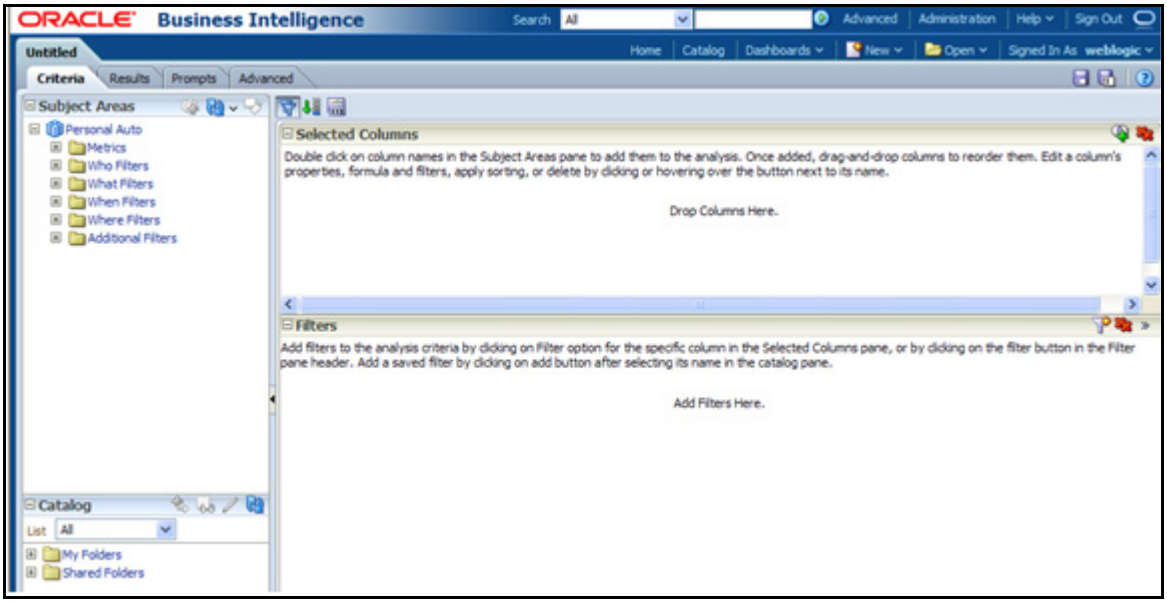


Figure 78: Analysis Editor

ANALYSIS EDITOR

The Analysis Editor allows you to create or edit an analysis, or query, using the metrics and filters specific to a OII subject areas. The analysis results can be presented in tables and graphs. Analyses that you create can be saved in the Oracle BI Presentation Catalog and integrated into dashboards. The Analysis Editor contains the following panes:

- Subject Areas Pane
- Catalog Pane
- Selected Columns Pane
- Filters Pane

SUBJECT AREAS PANE

The Subject Areas pane contains the metrics and filters for the selected data mart. You can use these elements to construct analyses within OII. To see a description of a specific metric or filter, simply move the cursor over the item and a floating definition box will appear.

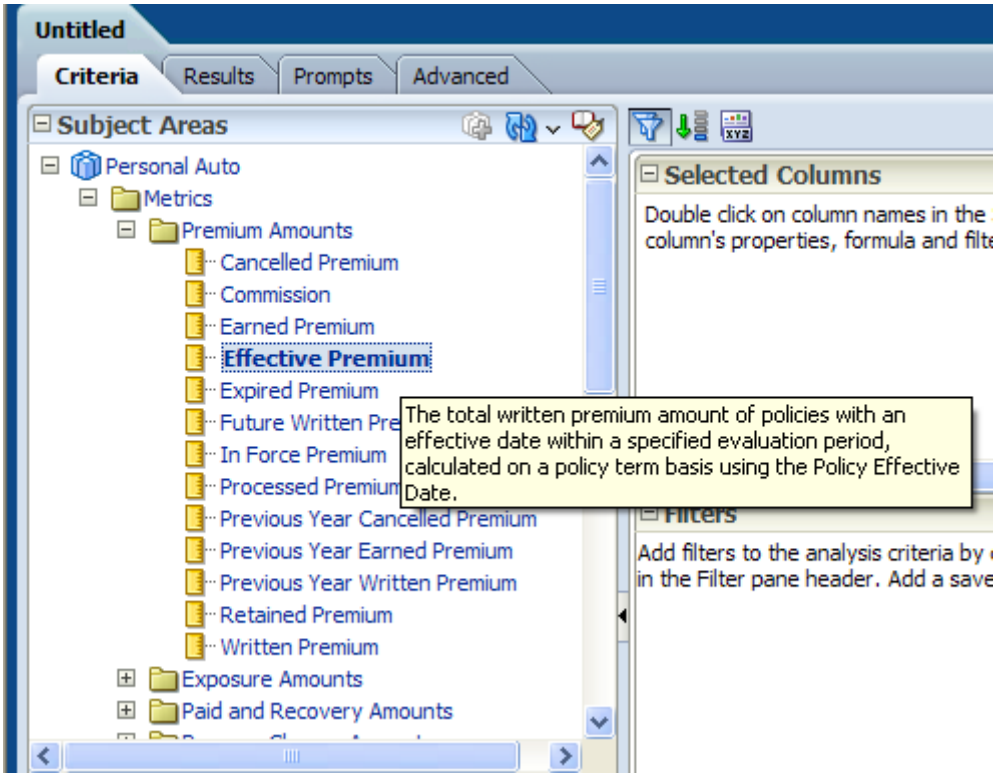


Figure 79: Description for Effective Premium

Metrics

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

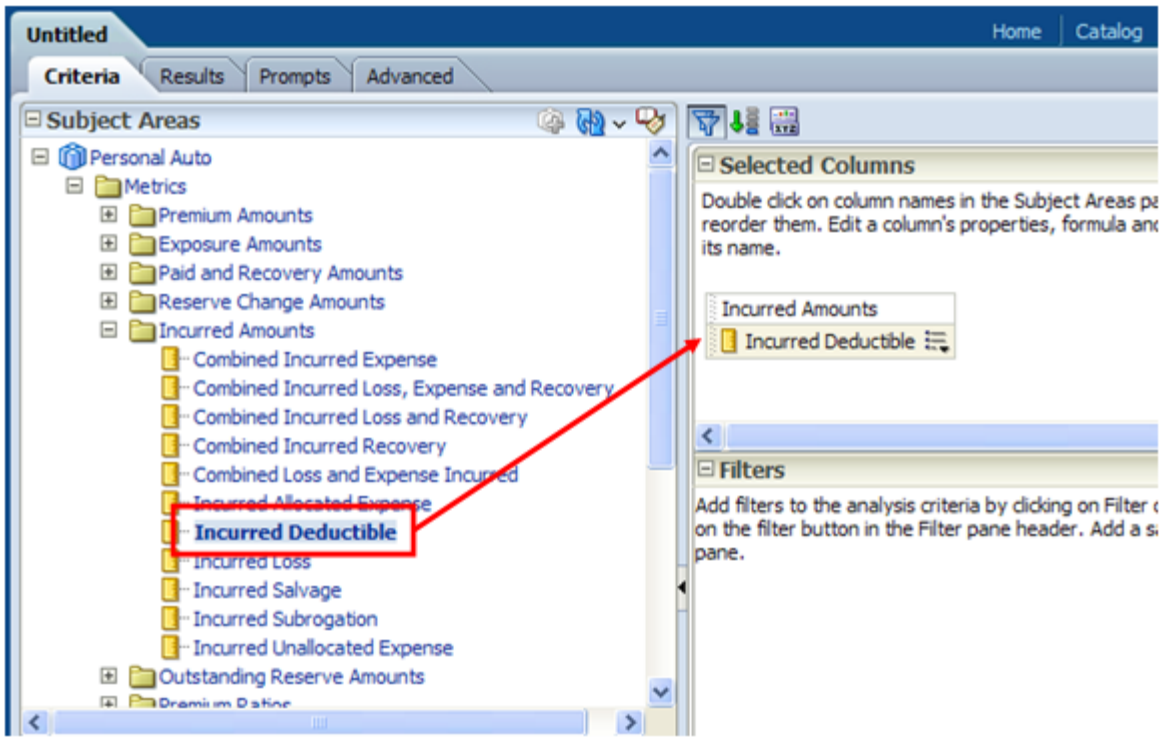


Figure 80: List of Metric Categories

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.

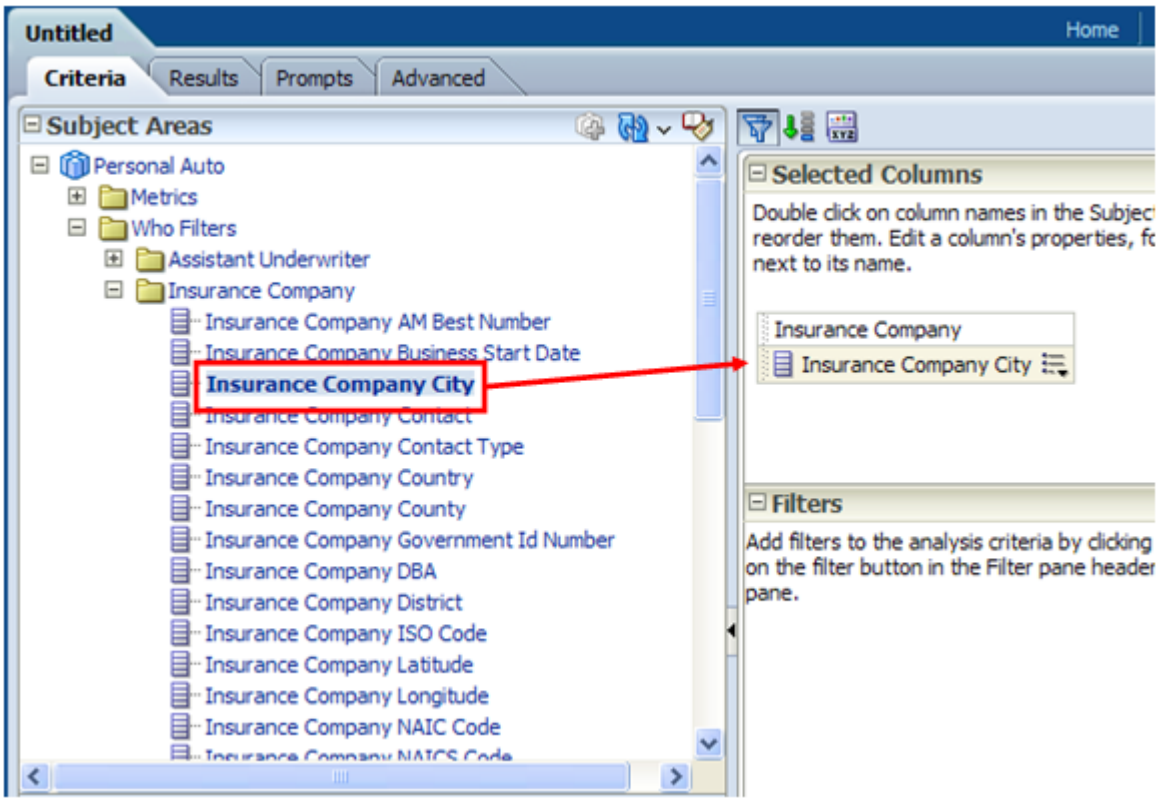


Figure 81: List of Filter Categories

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.

CATALOG PANE

Use this pane to add objects to analyses and dashboards.

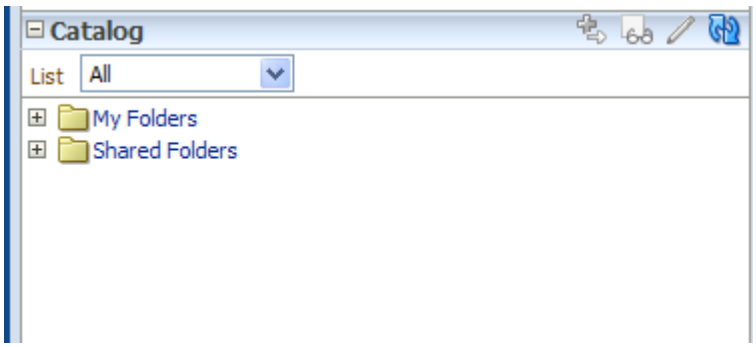


Figure 82: Catalog Pane

- **My Folders** - This is a personal folder where you can save the analyses 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 analyses that are saved in the Shared Folders will be available to all users.

SELECTED COLUMNS PANE

Use this pane to construct an analysis by adding metrics and filters from the Subject Area pane.

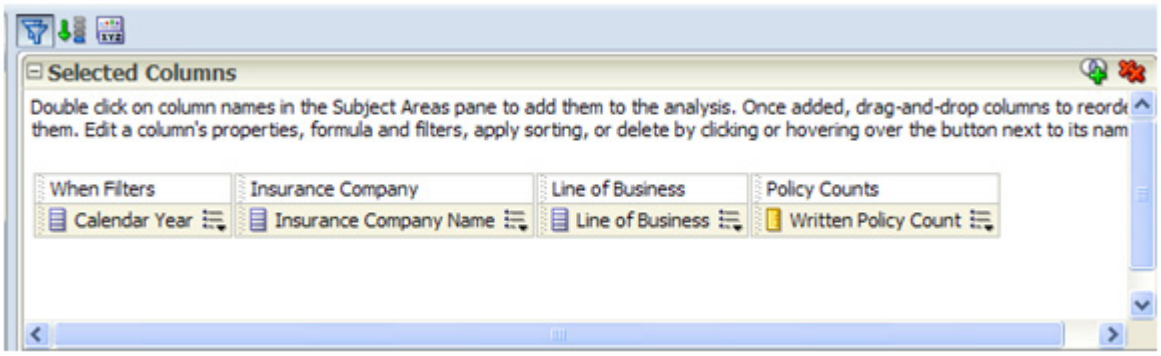


Figure 83: Selected Columns Pane

FILTERS PANE

Use this pane to add a filter to an analysis.

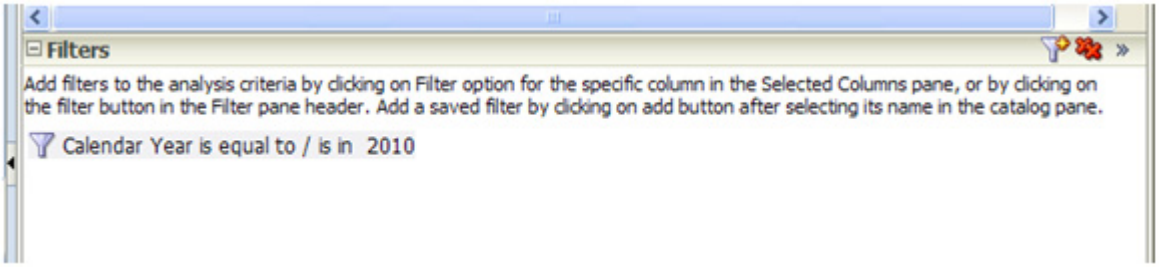


Figure 84: Filters Pane

VIEWING THE OII METADATA DICTIONARY FROM THE SUBJECT AREA

The **View Metadata Dictionary** button in the upper right hand corner of the Subject Area pane opens a metadata dictionary in a separate browser window showing multiple contents items and levels for a selected metric or filter.

To view metadata information for a metric or filter:

1. In the Subject Area pane, select a metric or filter.
2. Click the **View Metadata Dictionary** button.

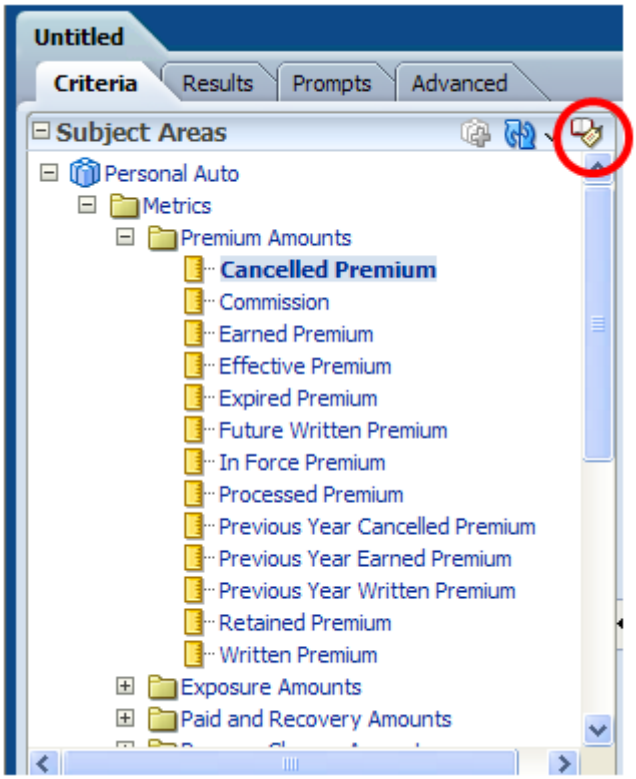


Figure 85: View Metadata Dictionary Button

The metadata information for the selected filter or metric is displayed in a separate browser window. The figure below shows the metadata entry for the Cancelled Premium metric.

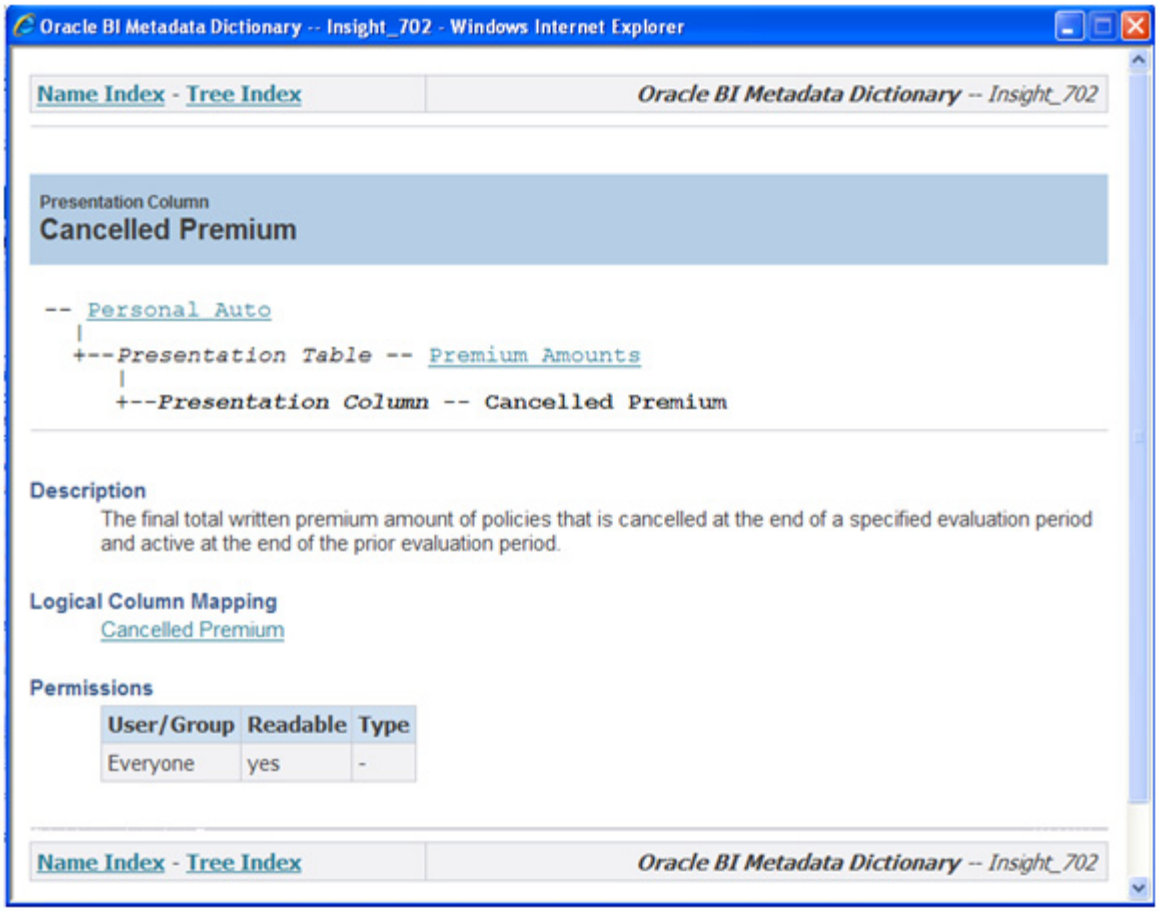


Figure 86: Metadata Dictionary

BUILDING AN ANALYSIS

This section describes how to use the OII metrics and filters to construct analyses. It is not meant to be a comprehensive explanation of all of the features and capabilities available for analyses within OBIEE. Rather, it describes the basics of constructing and managing analyses using the OII data components. For a complete description of analyses, refer to User's Guide for *Oracle Business Intelligence Enterprise Edition* for version 11.1.1.

To Build an Analysis:

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 analyses 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. From the menu bar, select **New>Analysis**.

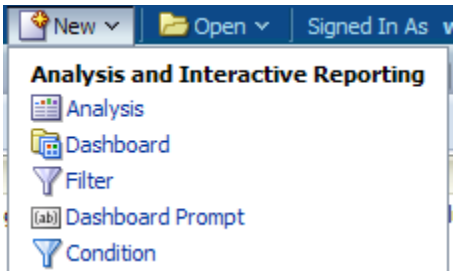


Figure 87: Select Analysis

2. From the Subject Area list, select **Claim Monthly Snapshot**.

Figure 88: Select Claim Monthly Snapshot

The Analysis Editor for the **Claim Monthly Snapshot** mart will open:

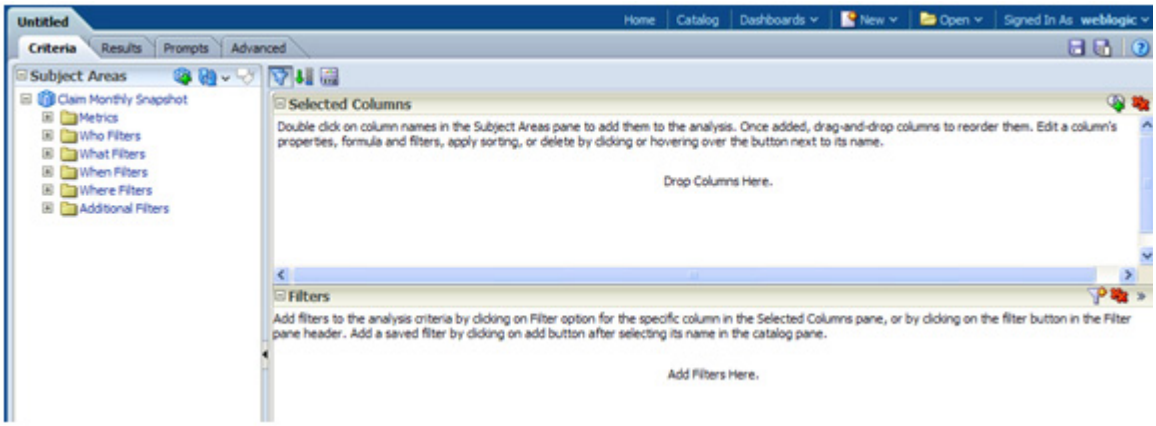


Figure 89: The Analysis Editor for Claim Monthly Snapshot

3. Expand the **When Filters** folder and click on **Calendar Year**. The **Calendar Year** column filter is added to the Selected Columns pane.

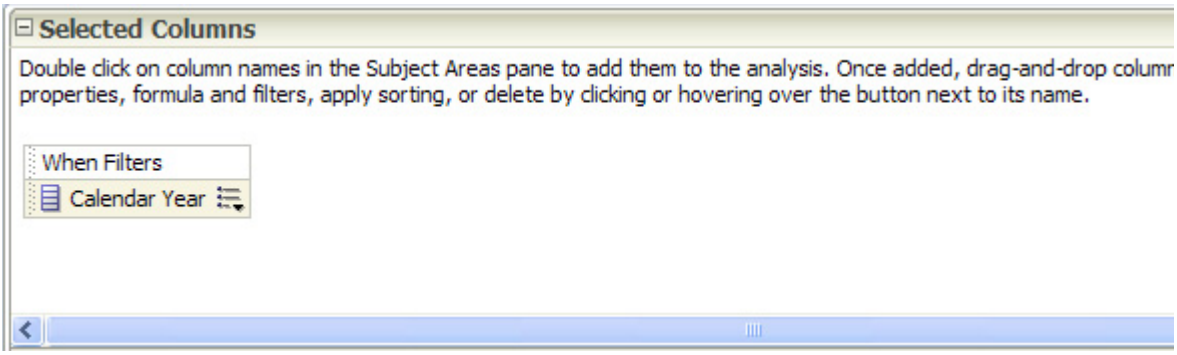


Figure 90: When Filters

4. Expand the **Who Filters**>**Insurance Company** folders.
5. Click on the **Insurance Company Name** filter. The **Insurance Company Name** filter.is added to the Selected Columns pane.

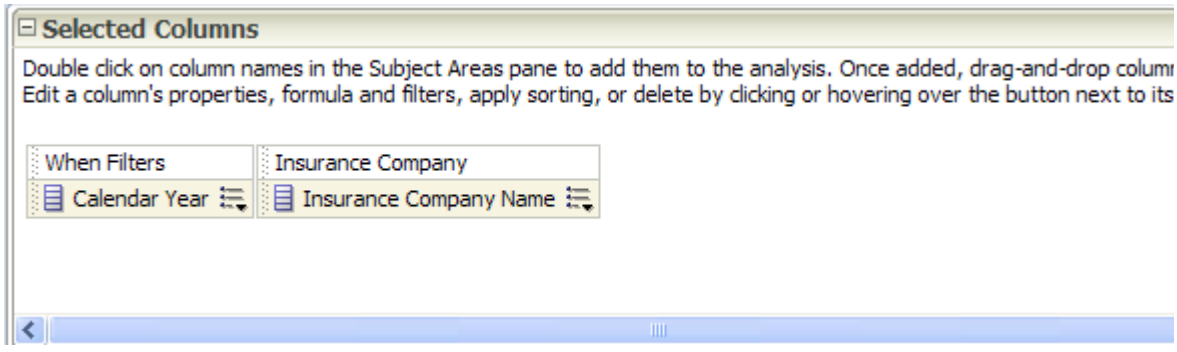


Figure 91: When+Who Filters

6. Expand the **What Filters>Line of Business** folders.

7. Click on the **Line of Business** filter to add to the Selected Columns pane.

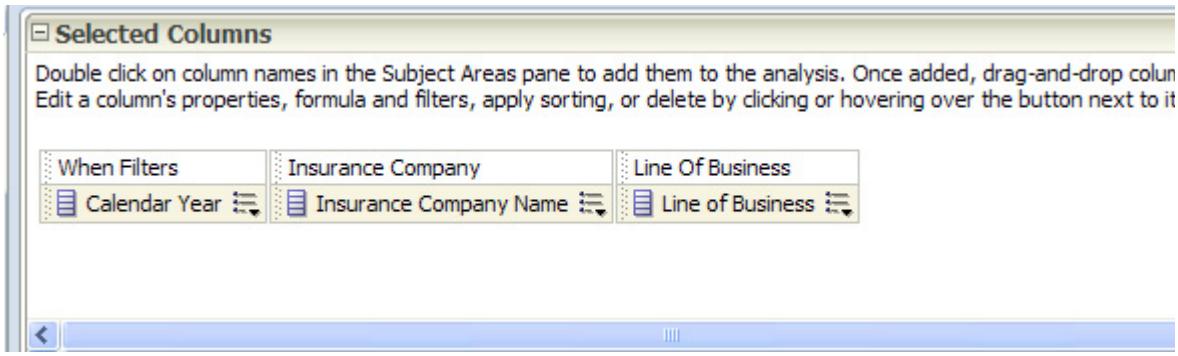


Figure 92: When+Who+What Filters

8. Expand the **Metrics>Count** folder.
9. Click on **Claimant Count** to add it to the analysis.

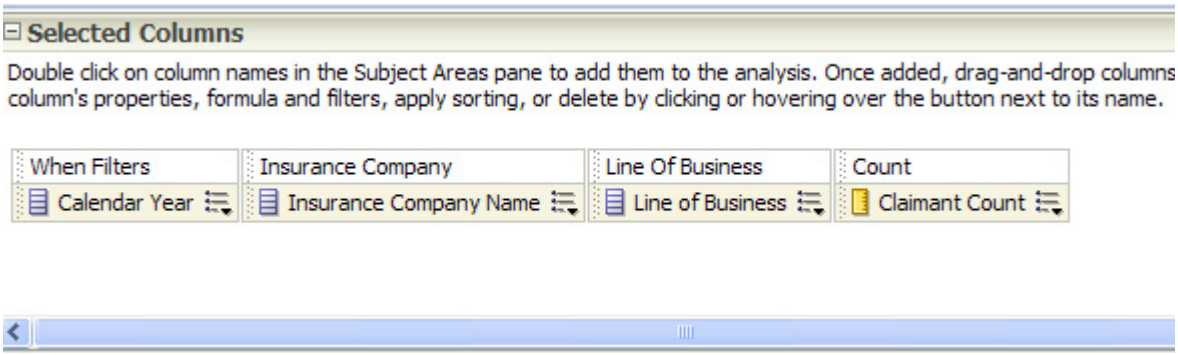


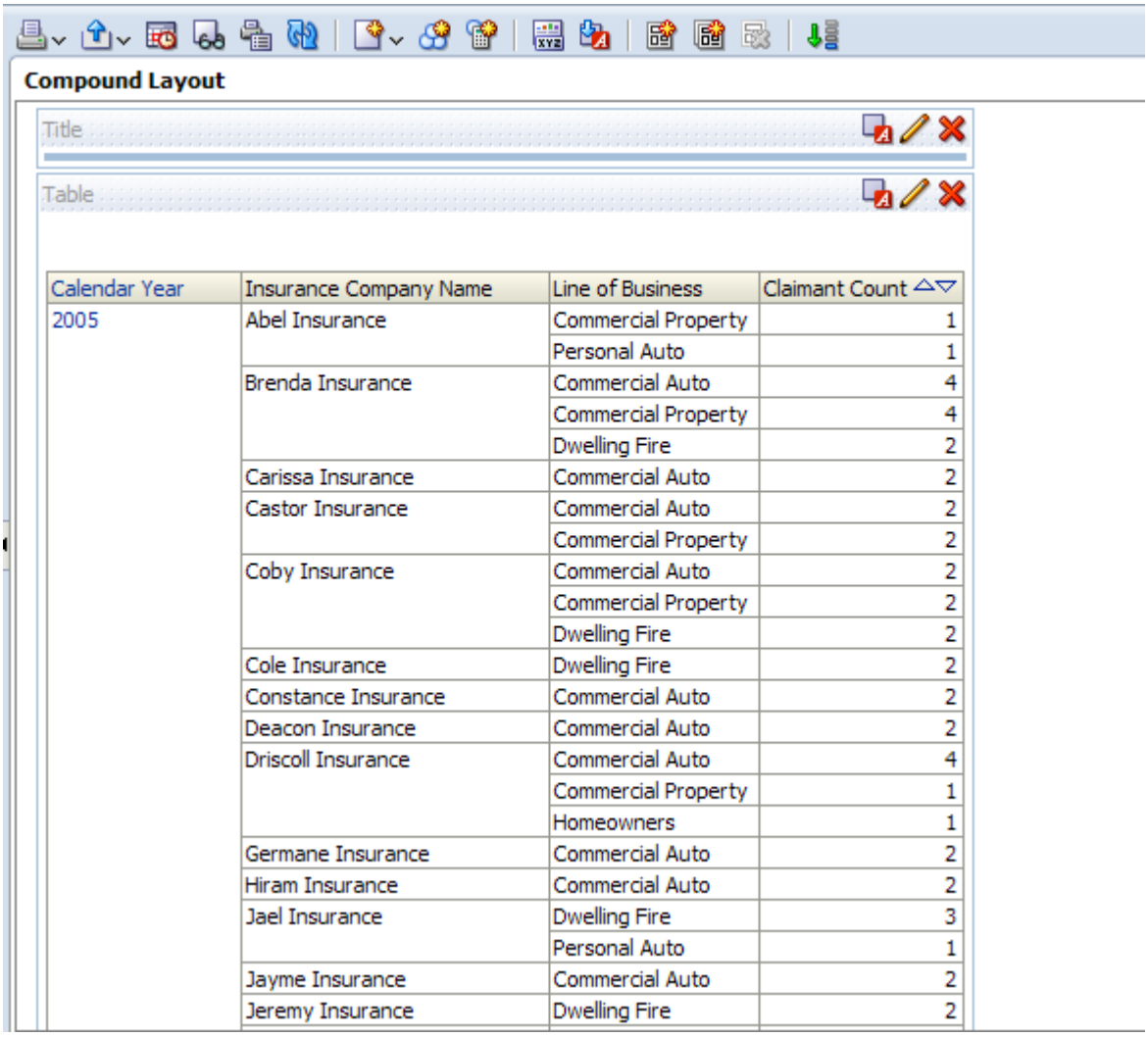
Figure 93: When+Who+What+Filters+Claimant Count Metric

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

To do this...	Go to...
Viewing the Results	page 81
Saving a Request	page 82
Retrieving a Request	page 83

VIEWING THE RESULTS

1. Click on the **Results** tab. The Results tab opens and displays the analysis in a standard table format as shown below.



Compound Layout

Title

Table

Calendar Year	Insurance Company Name	Line of Business	Claimant Count
2005	Abel Insurance	Commercial Property	1
		Personal Auto	1
	Brenda Insurance	Commercial Auto	4
		Commercial Property	4
		Dwelling Fire	2
	Carissa Insurance	Commercial Auto	2
	Castor Insurance	Commercial Auto	2
		Commercial Property	2
	Coby Insurance	Commercial Auto	2
		Commercial Property	2
		Dwelling Fire	2
	Cole Insurance	Dwelling Fire	2
	Constance Insurance	Commercial Auto	2
	Deacon Insurance	Commercial Auto	2
	Driscoll Insurance	Commercial Auto	4
		Commercial Property	1
		Homeowners	1
	Germane Insurance	Commercial Auto	2
	Hiram Insurance	Commercial Auto	2
	Jael Insurance	Dwelling Fire	3
		Personal Auto	1
	Jayme Insurance	Commercial Auto	2
	Jeremy Insurance	Dwelling Fire	2

Figure 94: Analysis Results

2. Use the toolbar along the top of the screen to edit the analysis results according to your needs.

Figure 95: Analysis Toolbar

SAVING AN ANALYSIS

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

Figure 96: Save Buttons

Selecting either button will open the **Save As** dialog box:

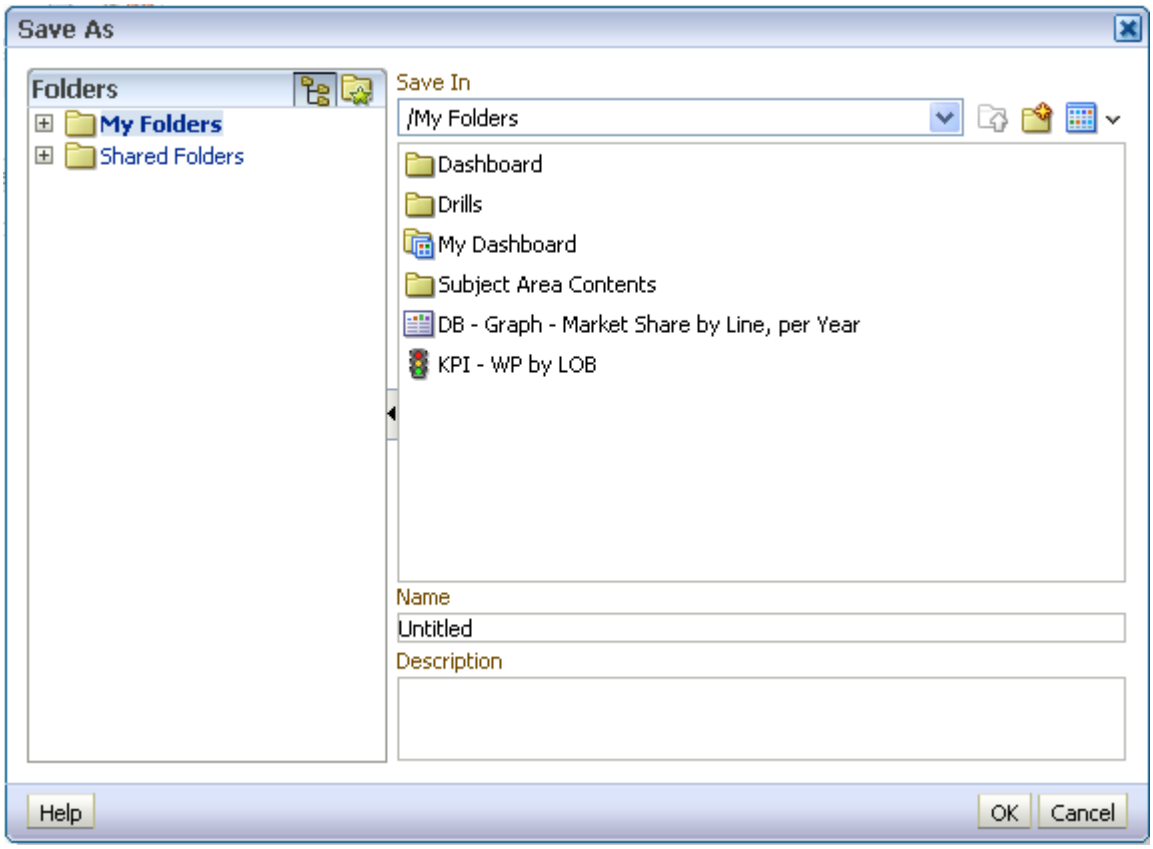


Figure 97: Save a Request

2. Save the analysis to either **My Folders** or **Shared Folder**. To specify a subfolder, click the **Create Folder** button in the Save As dialog box and type the name of the new folder.

Figure 98: New Folder Button

3. Enter the Name and Description (optional) of the analysis.
4. Click **OK**.

RETRIEVING AN ANALYSIS

1. Click on the **Catalog** in the tool bar.

Figure 99: Select the Catalog Link

The Catalog page will open.

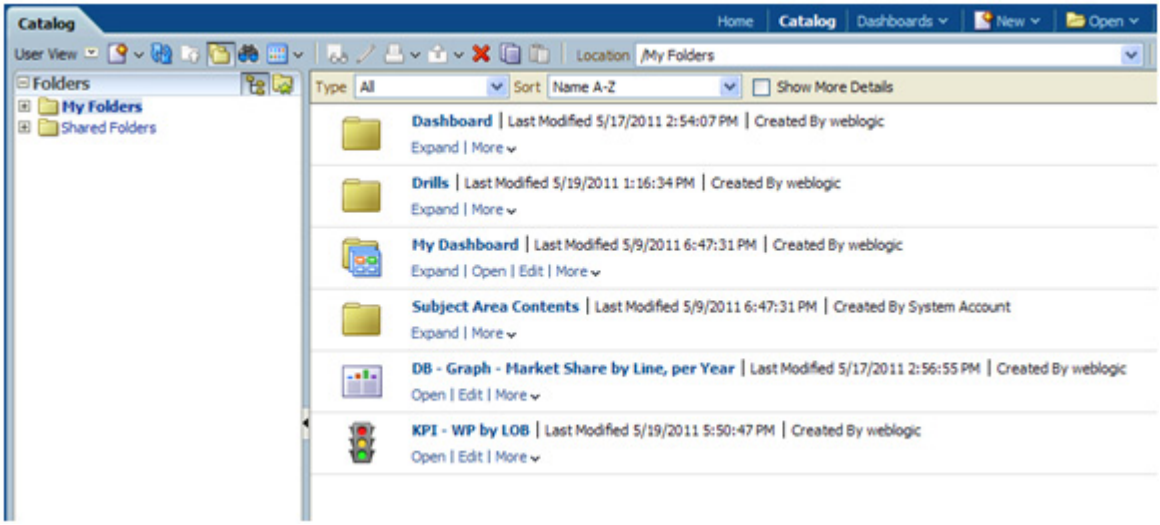


Figure 100: Catalog Page

2. Click on the **Expand** link beneath the folder where your analysis is stored.
3. The contents of that folder will be displayed in the workspace area.

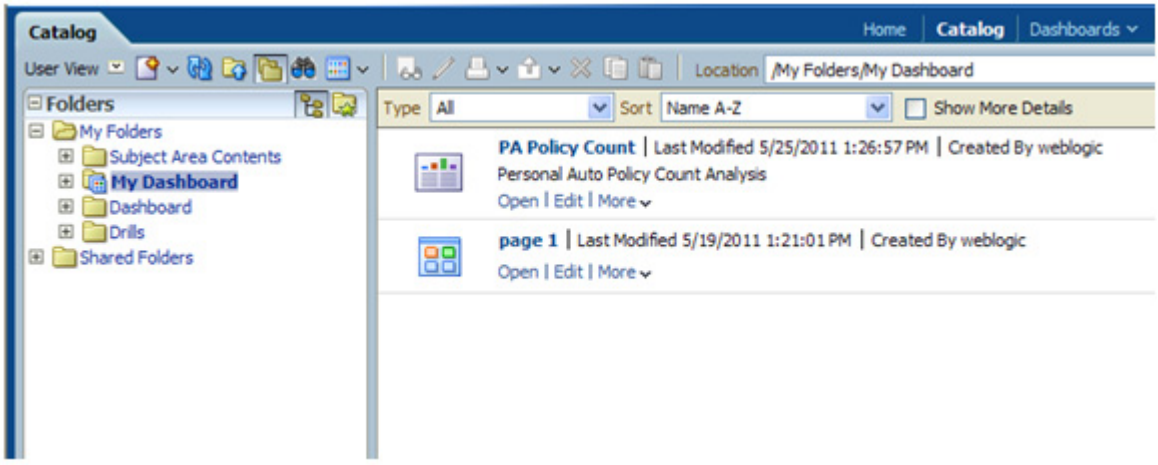


Figure 101: Contents of a Shared Folder

4. To preview the analysis results, click the **Open** link beneath the title of the analysis. The page will refresh and the analysis results will be displayed.

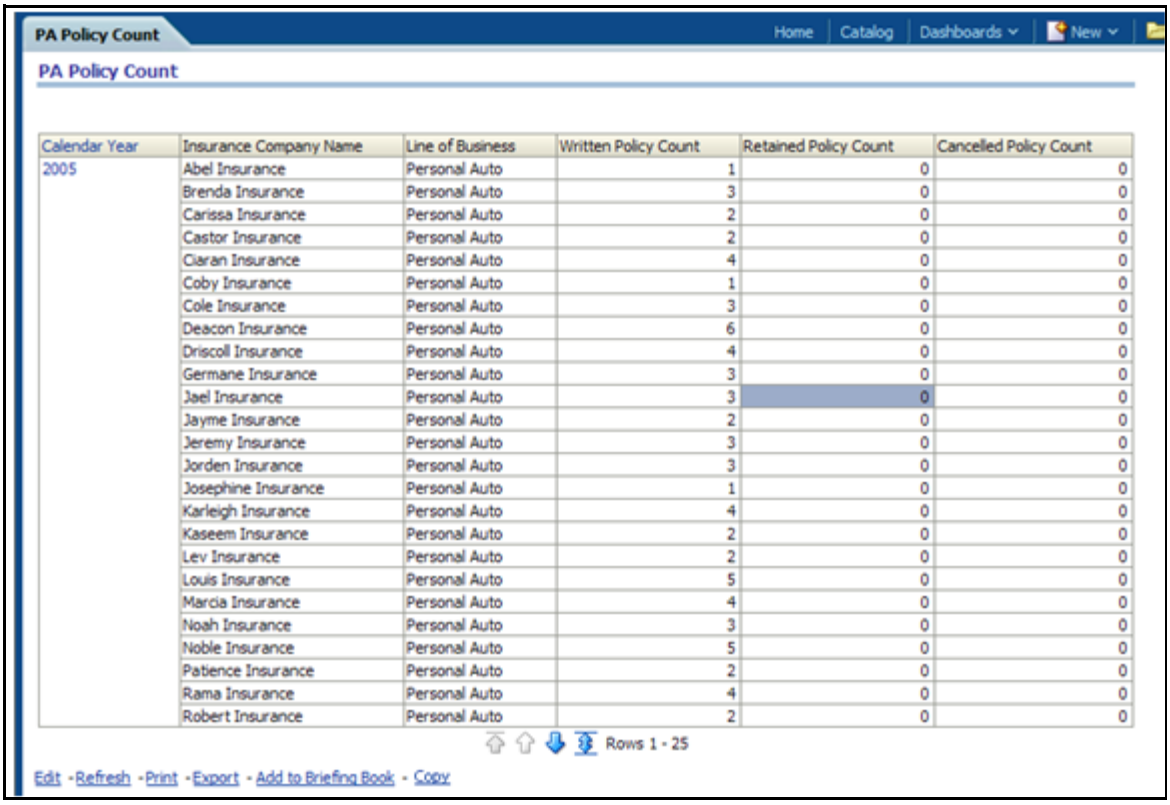


Figure 102: The Results of a Saved Analysis

5. To open the analysis for editing, select the **Edit** link on either the Preview page in Figure 102 above or on the Catalog page in Figure 101. The analysis will open in the Compound Layout area of the screen.

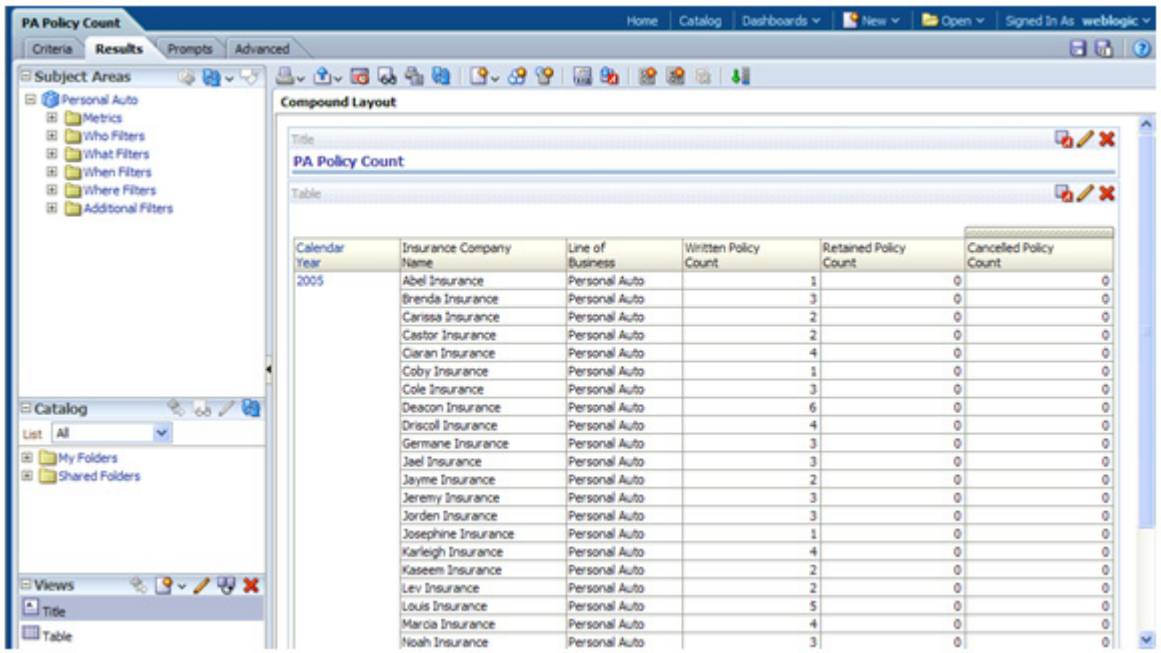


Figure 103: Compound Layer Area

6. To change the content of the analysis, select the Criteria tab. The columns and filters that make up the report will be displayed in the Criteria tab.

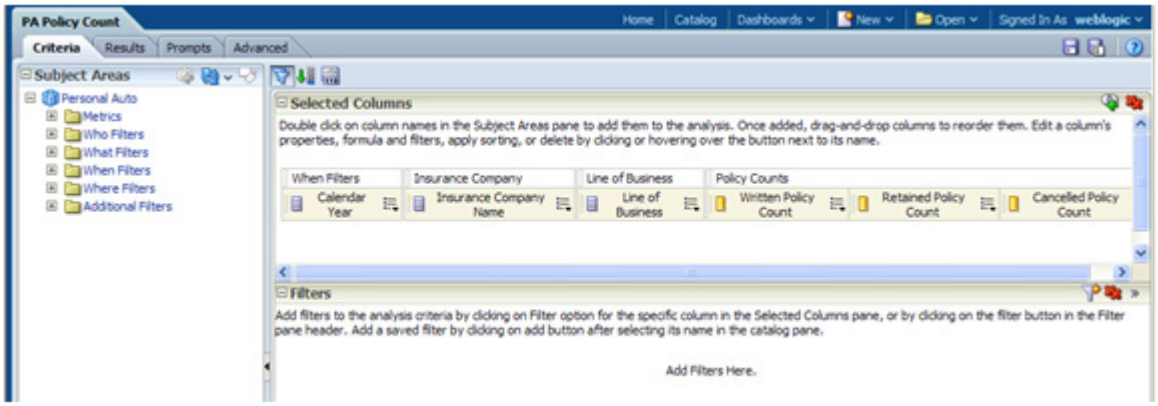


Figure 104: Displaying the Retrieved Analysis in the Criteria Tab

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.

OPENING A SHARED FOLDER FOR A LOB OR CORPORATE MART

1. Click on the **Catalog** link on the menu bar. By default the workspace of My Folders will appear

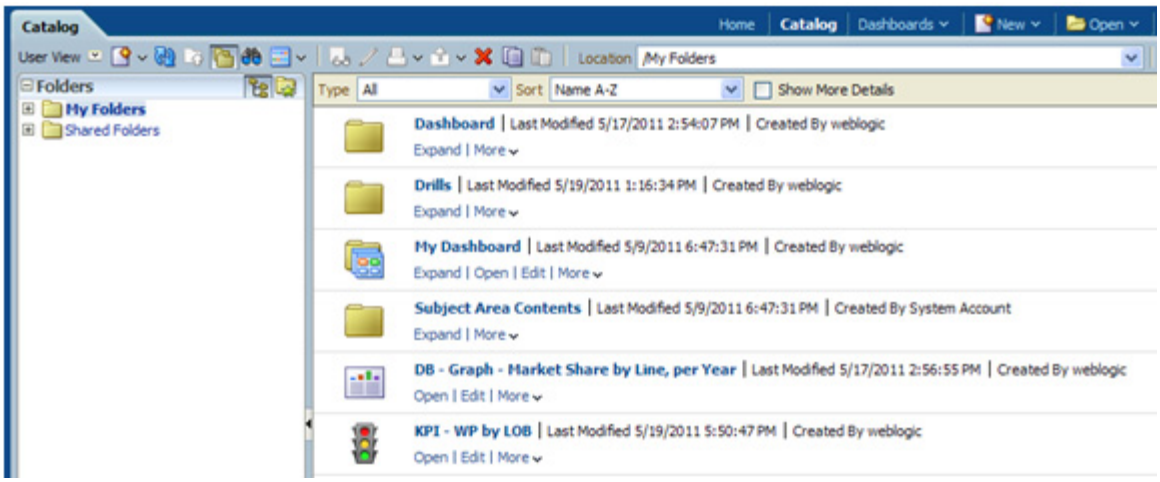


Figure 105: My Folders Workspace

2. Select **Shared Folders** in the Folders pane on the left. The workspace on the right will show the contents of Shared Folders which includes the Dashboard reports for all LOBs as well as the OII reports.

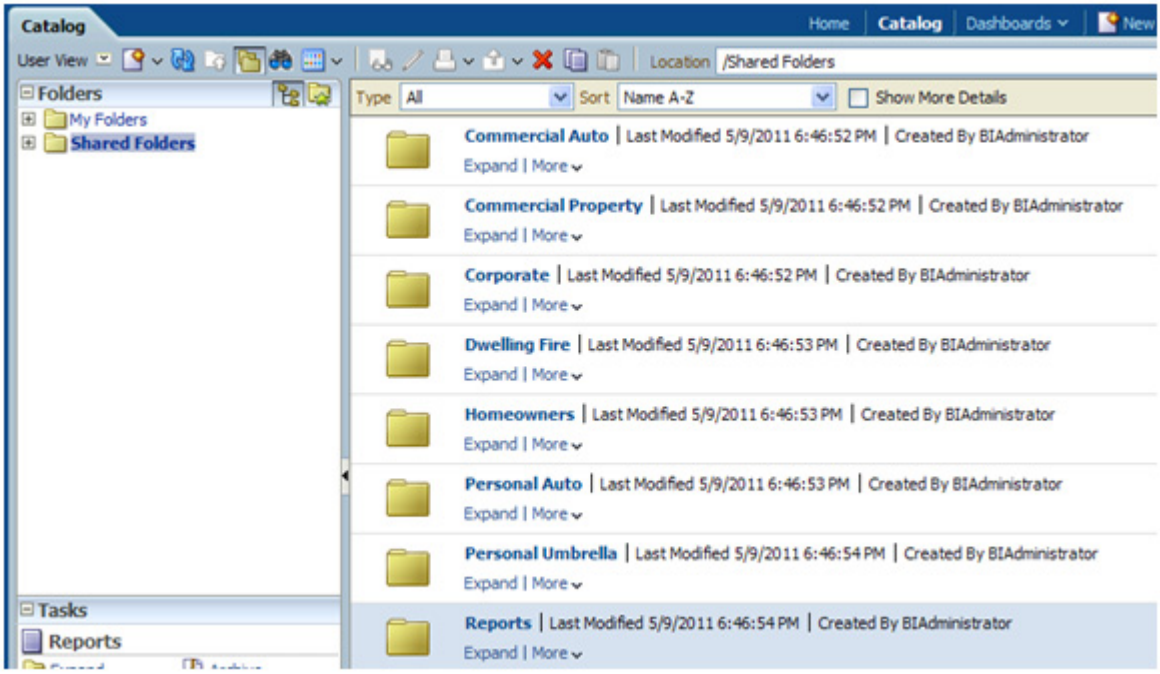


Figure 106: Shared Folders

3. Click on the **Expand** link under any LOB folder (for example, Personal Auto). The following content will appear in the workspace for the Personal Auto LOB.

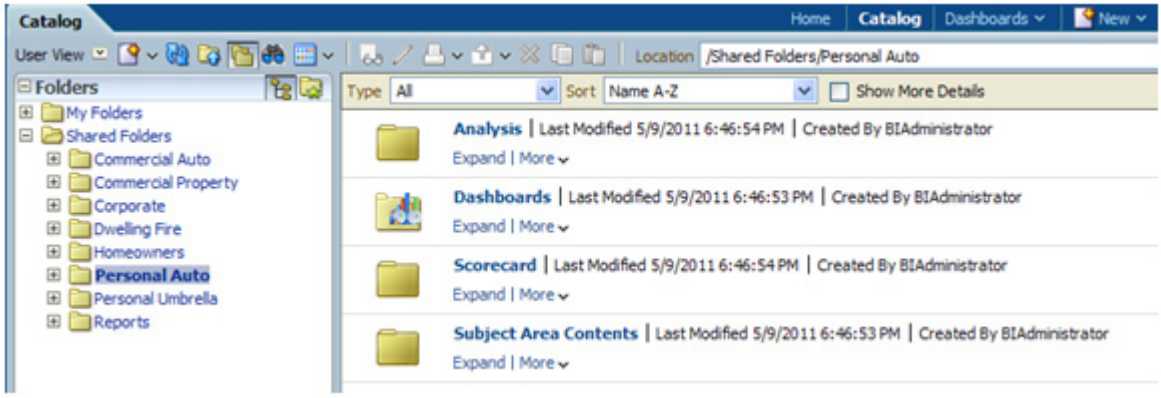


Figure 107: Personal Auto Content

The content in the figure above is typical across all LOBs.

Analysis

This folder contains all Analysis reports for the LOB. Use the links beneath each report to open and save them as templates to a personal folder under My Folder.

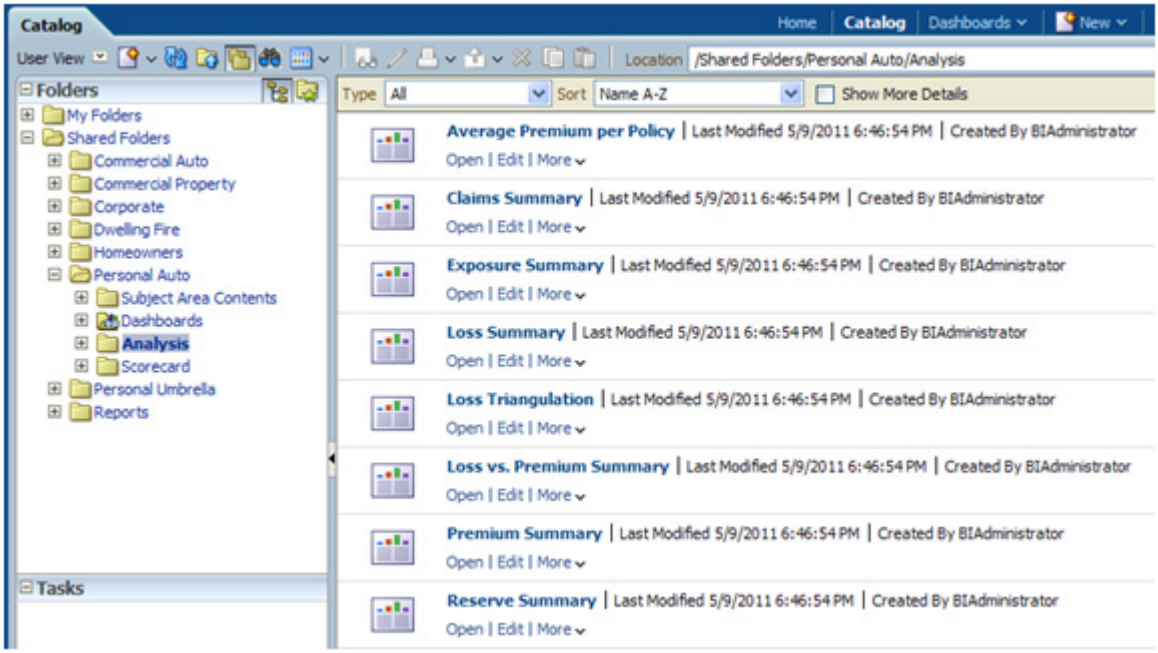


Figure 108: Personal Auto Analysis Reports

Dashboards

This folder contains the dashboard layouts for each of the OII roles.

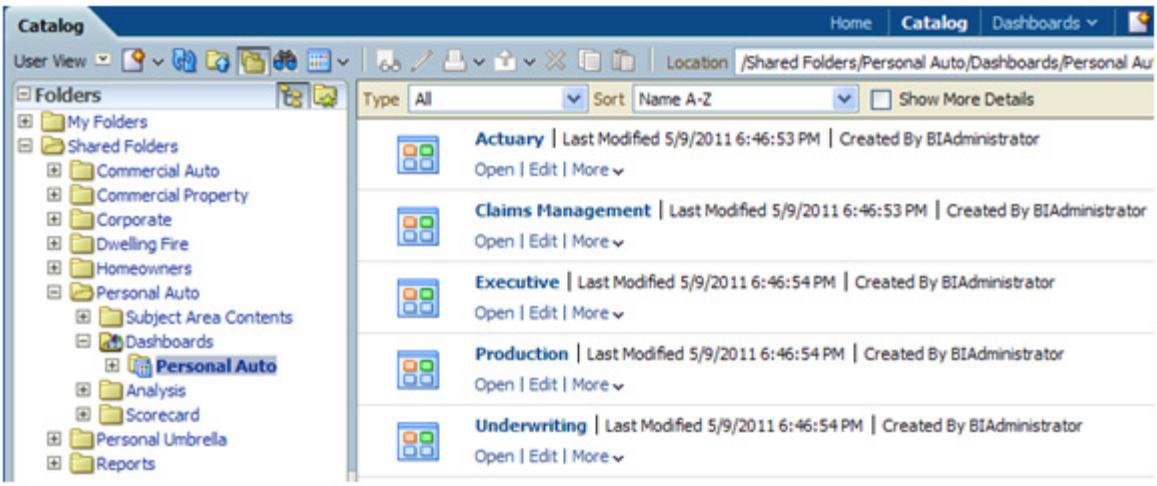


Figure 109: Dashboards for each OII Role for Personal Auto

Scorecard

This folder contains the templates for the LOB Scorecard reports.

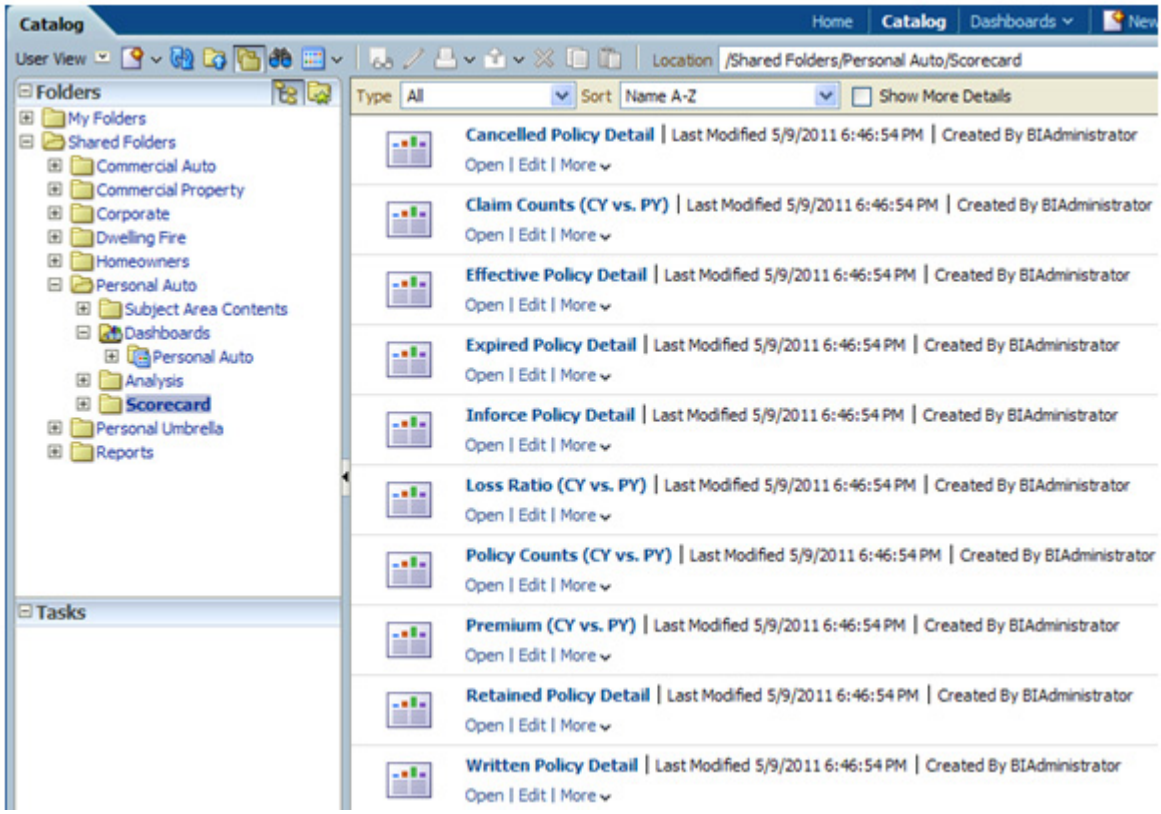


Figure 110: Personal Auto Scorecard Reports

Subject Area Contents

This folder contains the set of filters used within the dashboard reports for the selected LOB mart.

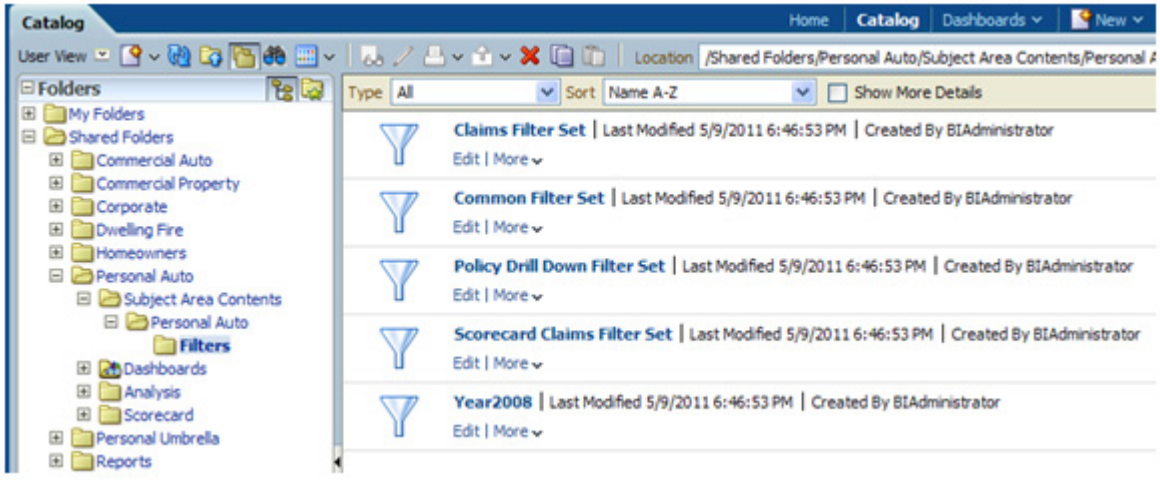


Figure 111: Filters for Personal Auto

OPENING A SHARED FOLDER FOR THE OII REPORTS DASHBOARD

Expand the **Reports** folder under the **Folders** pane on the left.

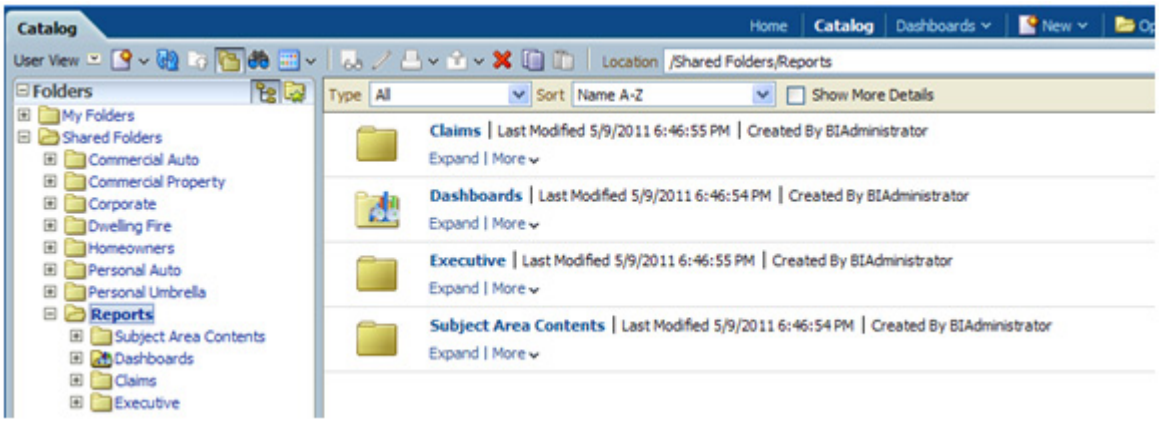


Figure 112: Shared Folder for the Reports Dashboard

The Reports folder contains the following subfolders:

- **Subject Area Contents** - Contains the set of filters used thought the OII Reports.
- **Dashboards** - Contains the dashboard layouts for the Claims and Executive tabs.
- **Claims** - Contains the contents of the Claims reports.
- **Executives** - Contains the contents of the Executives reports.

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 3: 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 3: 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 3: 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 3: 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 3: 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 3: 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 3: 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 3: 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 3: 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 3: 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 3: 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 3: 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 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.

Table 3: 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 3: 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 3: 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 3: 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 3: 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 3: 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 3: 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 3: 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 cat as top he 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 3: 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 3: 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 3: 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 3: 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 3: 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 3: 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 3: 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 3: 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 3: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 4: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 5: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 6: 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 7: 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 7: 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 7: 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 7: 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 7: 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 7: 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.

Table 7: Corporate Detail (Continued)

Category	Filter	Description
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.
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.

Table 7: Corporate Detail (Continued)

Category	Filter	Description
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.
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.

Table 7: Corporate Detail (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 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.

Table 7: Corporate Detail (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 7: Corporate Detail (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 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.

Table 7: Corporate Detail (Continued)

Category	Filter	Description
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 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.

Table 7: Corporate Detail (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	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.

Table 7: Corporate Detail (Continued)

Category	Filter	Description
What	Policy Age	The age of the policy.
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.
Coverage	Coverage Part	An indicator of a line of business within a package policy.

Table 7: 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 7: 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 7: 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 7: 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 7: 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 7: 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 7: 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 7: 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 7: 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 8: 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 8: 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 8: 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 8: 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 8: 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 8: 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 8: 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 8: 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 8: 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 8: 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 8: 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 8: 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.

Table 8: Dwelling Fire (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 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.

Table 8: Dwelling Fire (Continued)

Category	Filter	Description
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>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 8: Dwelling Fire (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 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.

Table 8: Dwelling Fire (Continued)

Category	Filter	Description
Dwelling Fire Dwelling	Dwelling Fire Condition	The classification detailing the maintenance condition of a dwelling.
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.

Table 8: Dwelling Fire (Continued)

Category	Filter	Description
Dwelling Fire Dwelling	Dwelling Fire Location Longitude	The longitude location of the dwelling location.
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.

Table 8: Dwelling Fire (Continued)

Category	Filter	Description
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
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.

Table 8: Dwelling Fire (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>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.

Table 8: Dwelling Fire (Continued)

Category	Filter	Description
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.
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.

Table 8: Dwelling Fire (Continued)

Category	Filter	Description
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.
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.

Table 8: Dwelling Fire (Continued)

Category	Filter	Description
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.
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		

Table 8: Dwelling Fire (Continued)

Category	Filter	Description
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.
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.

Table 8: Dwelling Fire (Continued)

Category	Filter	Description
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.
	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.

Table 8: Dwelling Fire (Continued)

Category	Filter	Description
	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	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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 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.

Table 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 9: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 10: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 11: 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 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.

Table 11: 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 12: 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 12: 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 12: 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 12: 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 12: 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 12: 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 12: 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 12: 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 12: 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 12: 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 12: 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 12: 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 12: 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 12: 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 12: 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 12: 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 12: 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 analyses 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 13: 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 13: 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	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. The formula for calculating the Cancelled Policy Count is as follows: CancellationDate >= BOMDate and CancellationDate < EOMDate
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 13: 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 13: 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 13: 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.
Commission 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 13: 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 (1/365th) or a monthly (1/24th) 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 13: 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	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: • 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 13: 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	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. Inforce Policy Count is calculated as: ExpirationDate >= EOMDate and EffectiveDate < EOMDate and (CancellationDate >= EOMDate or CancellationDate < EffectiveDate)
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 13: 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 13: 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 Written 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 Occurrence Count	The number of claim occurrences during the previous quarter.

Table 13: 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 Written 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 13: 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 13: Metric Definitions (Continued)

Metrics	Description
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. 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))
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 13: 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 14: 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 14: Glossary of Terms (Continued)

Field	Definition/Formula
Average Allocated Expense Paid Per Claim	Allocated Expenses ÷ Total Claim Occurrence Count
Average Loss Severity	Incurred Losses ÷ Total Open Claim Count
Average Policy Size	Written Premium ÷ 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: accident year case incurred loss amount ÷ 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 14: 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 14: Glossary of Terms (Continued)

Field	Definition/Formula
Mart	A set of "Query Ready" tables designed to support specific analytical requirements. Data marts contact 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	(Salvage Recovered + Subrogation Recovered) ÷ (Incurred Loss + Total Loss Adjustment Expense [ALAE + ULAE])
Recoveries to Incurred Ratio	(Salvage Recovered + Subrogation Recovered) ÷ Incurred Loss *not including* Expenses
Reserve Loss Ratio	Loss Reserve Amount ÷ 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 *Governing* 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 fro the policyholder's state/province or exposure state/province.
Unallocated Expense Reserves to All Reserves	Unallocated Reserves ÷ (Allocated Reserves + Unallocated Reserves)
Unallocated Expenses Paid to Paid Loss	(Initial Unallocated Expenses + Change in Allocated Expenses) ÷ Paid Loss

Table 14: 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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