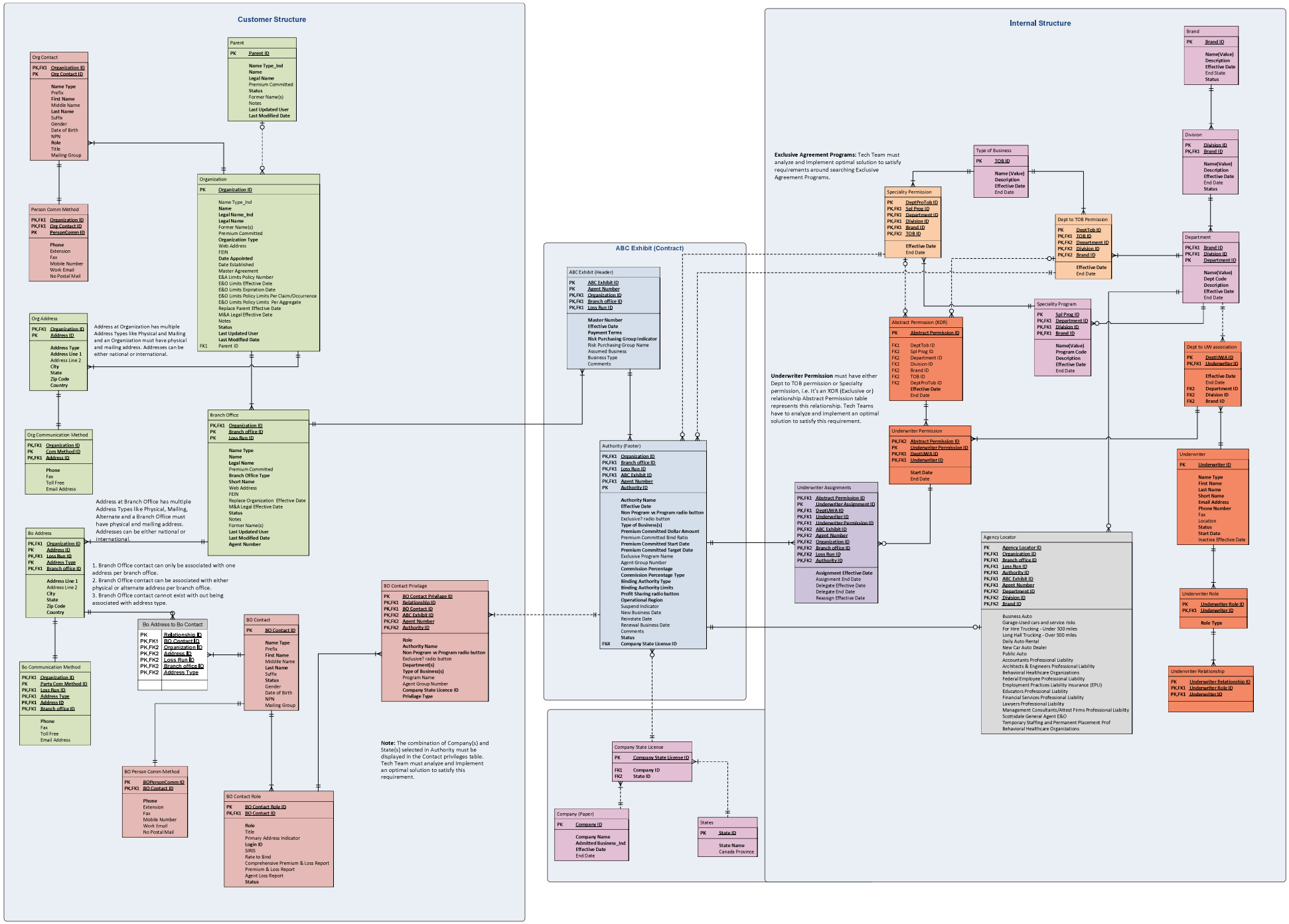
Customer Structure
Parent
PK Parent ID
Name Type_Ind
Name
Legal Name
Premium Committed
Status
Former Name(s)
Notes
Last Updated User
Last Modified Date
Org Contact
PK,FK1 Organization ID
PK Org Contact ID
Name Type
Prefix
First Name
Middle Name
Last Name
Suffix
Gender
Date of Birth
NPN
Role
Title
Mailing Group
Organization
PK Organization ID
Name Type_Ind
Name
Legal Name_Ind
Legal Name
Former Name(s)
Premium Committed
Organization Type
Web Address
FEIN
Date Appointed
Date Established
Master Agreement
E&A Limits Policy Number
E&O Limits Effective Date
E&O Limits Expiration Date
E&O Limits Policy Limits Per Claim/Occurrence
E&O Limits Policy Limits Per Aggregate
Replace Parent Effective Date
M&A Legal Effective Date
Notes
Status
Last Updated User
Last Modified Date
FK1 Parent ID
Person Comm Method
PK,FK1 Organization ID
PK,FK1 Org Contact ID
PK PersonComm ID
Phone
Extension
Fax
Mobile Number
Work Email
No Postal Mail
Org Address
PK,FK1 Organization ID
PK Address ID
Address Type
Address Line 1
Address Line 2
City
State
Zip Code
Country
Address at Organization has multiple Address Types like Physical and Mailing and an Organization must have physical and mailing address. Addresses can be either national or international.
Org Communication Method
PK,FK1 Organization ID
PK Com Method ID
PK,FK1 Address ID
Phone
Fax
Toll Free
Email Address
Branch Office
PK,FK1 Organization ID
PK Branch office ID
PK Loss Run ID
Name Type
Name
Legal Name
Premium Committed
Branch Office Type
Short Name
Web Address
FEIN
Replace Organization Effective Date
M&A Legal Effective Date
Status
Notes
Former Name(s)
Last Updated User
Last Modified Date
Agent Number
Address at Branch Office has multiple Address Types like Physical, Mailing, Alternate and a Branch Office must have physical and mailing address. Addresses can be either national or international.
Bo Address
PK,FK1 Organization ID
PK Address ID
PK,FK1 Loss Run ID
PK Address Type
PK,FK1 Branch office ID
Address Line 1
Address Line 2
City
State
Zip Code
Country
1. Branch Office contact can only be associated with one address per branch office.
2. Branch Office contact can be associated with either physical or alternate address per branch office.
3. Branch Office contact cannot exist with out being associated with address type.
Bo Address to Bo Contact
PK Relationship ID
PK,FK1 BO Contact ID
PK,FK2 Organization ID
PK,FK2 Address ID
PK,FK2 Loss Run ID
PK,FK2 Branch office ID
PK,FK2 Address Type
BO Contact
PK BO Contact ID
Name Type
Prefix
First Name
Middle Name
Last Name
Suffix
Status
Gender
Date of Birth
NPN
Mailing Group
Bo Communication Method
PK,FK1 Organization ID
PK Party Com Method ID
PK,FK1 Loss Run ID
PK,FK1 Address Type
PK,FK1 Address ID
PK,FK1 Branch office ID
Phone
Fax
Toll Free
Email Address
BO Person Comm Method
PK BOPersonComm ID
PK,FK1 BO Contact ID
Phone
Extension
Fax
Mobile Number
Work Email
No Postal Mail
BO Contact Role
PK BO Contact Role ID
PK,FK1 BO Contact ID
Role
Title
Primary Address Indicator
Login ID
SIRIS
Rate to Bind
Comprehensive Premium & Loss Report
Premium & Loss Report
Agent Loss Report
Status
BO Contact Privilage
PK BO Contact Privilage ID
PK,FK1 Relationship ID
PK,FK1 BO Contact ID
PK,FK2 ABC Exhibit ID
PK,FK2 Agent Number
PK,FK2 Authority ID
Role
Authority Name
Non Program vs Program radio button
Exclusive? radio button
Department(s)
Type of Business(s)
Program Name
Agent Group Number
Company State Licence ID
Privilage Type
Note: The combination of Company(s) and State(s) selected in Authority must be displayed in the Contact privileges table. Tech Team must analyze and implement an optimal solution to satisfy this requirement.
ABC Exhibit (Contract)
ABC Exhibit (Header)
PK ABC Exhibit ID
PK Agent Number
PK,FK1 Organization ID
PK,FK1 Branch office ID
PK,FK1 Loss Run ID
Master Number
Effective Date
Payment Terms
Risk Purchasing Group Indicator
Risk Purchasing Group Name
Assumed Business
Business Type
Comments
Authority (Footer)
PK,FK1 Organization ID
PK,FK1 Branch office ID
PK,FK1 Loss Run ID
PK,FK1 ABC Exhibit ID
PK,FK1 Agent Number
PK Authority ID
Authority Name
Effective Date
Non Program vs Program radio button
Exclusive? radio button
Type of Business(s)
Premium Committed Dollar Amount
Premium Committed Bind Ratio
Premium Committed Start Date
Premium Committed Target Date
Exclusive Program Name
Agent Group Number
Commission Percentage
Commission Percentage Type
Binding Authority Type
Binding Authority Limits
Profit Sharing radio button
Operational Region
Suspend Indicator
New Business Date
Reinstate Date
Renewal Business Date
Comments
Status
FK4 Company State License ID
Company State License
PK Company State License ID
FK1 Company ID
FK2 State ID
Company (Paper)
PK Company ID
Company Name
Admitted Business_Ind
Effective Date
End Date
States
PK State ID
State Name
Canada Province
Internal Structure
Brand
PK Brand ID
Name(Value)
Description
Effective Date
End State
Status
Division
PK Division ID
PK,FK1 Brand ID
Name(Value)
Description
Effective Date
End Date
Status
Exclusive Agreement Programs: Tech Team must analyze and implement optimal solution to satisfy requirements around searching Exclusive Agreement Programs.
Type of Business
PK TOB ID
Name (Value)
Description
Effective Date
End Date
Speciality Permission
PK DeptProTob ID
PK,FK1 Spl Prog ID
PK,FK1 Department ID
PK,FK1 Division ID
PK,FK1 Brand ID
PK,FK2 TOB ID
Effective Date
End Date
Dept to TOB Permission
PK DeptTob ID
PK,FK1 TOB ID
PK,FK2 Department ID
PK,FK2 Division ID
PK,FK2 Brand ID
Effective Date
End Date
Department
PK,FK1 Brand ID
PK,FK1 Division ID
PK Department ID
Name(Value)
Dept Code
Description
Effective Date
End Date
Speciality Program
PK Spl Prog ID
PK,FK1 Department ID
PK,FK1 Division ID
PK,FK1 Brand ID
Name(Value)
Program Code
Description
Effective Date
End Date
Abstract Permission (XOR)
PK Abstract Permission ID
FK1 DeptTob ID
FK2 Spl Prog ID
FK2 Department ID
FK2 Division ID
FK2 Brand ID
FK2 TOB ID
FK2 DeptProTob ID
Effective Date
End Date
Underwriter Permission must have either Dept to TOB permission or Specialty permission, i.e. It's an XOR (Exclusive or) relationship Abstract Permission table represents this relationship. Tech Teams have to analyze and implement an optimal solution to satisfy this requirement.
Dept to UW association
PK DeptUWA ID
PK,FK1 Underwriter ID
Effective Date
End Date
FK2 Department ID
FK2 Division ID
FK2 Brand ID
Underwriter Permision
PK,FK2 Abstract Permission ID
PK Underwriter Permission ID
PK,FK1 DeptUWA ID
PK,FK1 Underwriter ID
Start Date
End Date
Underwriter
PK Underwriter ID
Name Type
First Name
Last Name
Short Name
Email Address
Phone Number
Fax
Location
Status
Start Date
Inactive Effective Date
Underwriter Assignments
PK,FK1 Abstract Permission ID
PK Underwriter Assignment ID
PK,FK1 DeptUWA ID
PK,FK1 Underwriter ID
PK,FK1 Underwriter Permission ID
PK,FK2 ABC Exhibit ID
PK,FK2 Agent Number
PK,FK2 Organization ID
PK,FK2 Branch office ID
PK,FK2 Loss Run ID
PK,FK2 Authority ID
Assignment Effective Date
Assignment End Date
Delegate Effective Date
Delegate End Date
Reassign Effective Date
Agency Locator
PK Agency Locator ID
PK,FK1 Organization ID
PK,FK1 Branch office ID
PK,FK1 Loss Run ID
PK,FK1 Authority ID
PK,FK1 ABC Exhibit ID
PK,FK1 Agent Number
PK,FK2 Department ID
PK,FK2 Division ID
PK,FK2 Brand ID
Business Auto
Garage-Used cars and service risks
For Hire Trucking - Under 500 miles
Long Haul Trucking - Over 500 miles
Daily Auto Rental
New Car Auto Dealer
Public Auto
Accountants Professional Liability
Architects & Engineers Professional Liability
Behavioral Healthcare Organizations
Federal Employee Professional Liability
Employment Practices Liability Insurance (EPLI)
Educators Professional Liability
Financial Services Professional Liability
Lawyers Professional Liability
Management Consultants/Attest Firms Professional Liability
Scottsdale General Agent E&O
Temporary Staffing and Permanent Placement Prof
Behavioral Healthcare Organizations
Underwriter Role
PK Underwriter Role ID
PK,FK1 Underwriter ID
Role Type
Underwriter Relationship
PK Underwriter Relationship ID
PK,FK1 Underwriter Role ID
PK,FK1 Underwriter ID
Legend
Customer Hierarchy
External Contact
ABC Exhibit
Internal Hierarchy
Product Permissions
Internal Underwriter
Underwrite Assignments
Agency Locator
Logical Data Model
Author(s): Praveen Parimi
Updated: 3/19/2016