

Explore for Policy Data Dictionary

Model: GW - Policy Financial Premium - Calendar Year



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Model column name	Description	Type	Source table name	Source column name	Formula
Attributes (A-Z)					
Accounting Period	The year and month of the accounting date. This field is created by a formula in the Explore model. The formula converts the month end date into a business-friendly string. For example, 20250331 becomes 'March 2025'.	Text	Formula	Formula	if (strpos (monthname , ' ') > 0) then concat (substr (monthname , 0 , strpos (monthname , ' ') - 1) , ' ' , yearid) else concat (monthname , ' ' , yearid)
Agency Name	First and last name of the contact associated with a premium.	Text	efr_dim_organization	dn_contactid_cf_fullname	
City	City location for the policy associated the the premium.	Text	efr_dim_region	cityinternal	
Country	Country location for the policy associated the the premium.	Text	efr_dim_region	tc_countryinternal	
County	County location for the policy associated the the premium.	Text	efr_dim_region	countyinternal	
Coverage Category	Coverage category of the coverage pattern.	Text	efr_dim_plcy_coverage	coveragecategory	
Coverage Name	Name of the clause pattern in the Product Model.	Text	efr_dim_plcy_coverage	coveragename	
Coverage Subtype	Coverage subtype of the clause in the Product Model.	Text	efr_dim_plcy_coverage	coveragesubtype	
Inforce Status	Inforce status of the last policy period in the business effectivity period.	Text	efr_fact_prem_calendaryear	cf_inforcestatus	
Month End Date	The last day of the accounting period month in the format 'YYYYMMDD'. For example, there were 30 days in November 2024, so the last day is 20241130.	Date	efr_dim_month	monthenddate	
New Renewal Flag	Flag that has a value of 'New' if the job subtype associated with the premium is a 'submission' or 'issuance'. Otherwise, the flag has a value of 'Renewal'.	Text	efr_dim_policyinfo	cf_newrenewalflag	
Policy Base State	State location where the policy period is based.	Text	efr_dim_policyinfo	tn_basestate	
Policy Effective Date	Date when a policy term starts.	Date	efr_dim_policyinfo	cf_periodstart	
Policy Number	Unique number for a bound policy term.	Number	efr_dim_policyinfo	polcynumber	
Postal Code	Postal code location for the policy associated the the premium.	Text	efr_dim_region	postalcodeinternal	
Producer Name	Description of the producer who receives the commissions for a policy. (The <i>Description</i> field in PolicyCenter.)	Text	efr_dim_producer	dn_organizationid_contactid_cf_fullname	
Product	Product code, such as Personal Auto, that defines the type of the policy that is associated with the premium.	Text	efr_fact_prem_calendaryear	dn_productcode	
Snapshot Period	Identifier for the snapshot period. The Accounting Period field is equivalent and formatted to be more business-friendly than the Snapshot Period field.	Number	efr_fact_prem_calendaryear	fk_snapshotperiod_bkey	
State	State location for the policy associated with the the premium. Note that if a transaction doesn't link to a policy location, it has a region of 'nokey' and this column doesn't apply. In that case, use the 'Policy Base State' column instead.	Text	efr_dim_region	tn_stateinternal	
Underwriter Name	First and last name of the underwriter who is assigned to the policy transaction associated with a premium.	Text	efr_dim_producer	dn_preferredunderwriterid_c ontactid_cf_fullname	
UW Company Name	Underwriting company name that is associated with a premium.	Text	efr_dim_uwcompany	name	
Measures (A-Z)					
Inforce Annualized Estimate Premium	Aggregate of annualized estimate premium amounts whose transaction effective period includes the accounting period.	Number	efr_fact_prem_calendaryear	cf_inforceannualizedestimate premium	
Inforce Annualized Written Premium	Aggregate of annualized written premium amounts whose transaction effective period includes the accounting period.	Number	efr_fact_prem_calendaryear	cf_inforceannualizedwrittenpr emium	
Inforce Estimate Premium	Aggregate of estimate premium amounts whose transaction effective period includes the accounting period. The aggregate does not include estimate premium amounts whose transaction effective period does not include the accounting period, even if the accounting period falls within the policy effective period. Inforce premium amount is not based on the accounting period being within the policy effective dates, but is based on the accounting period being within the transaction effective dates.	Number	efr_fact_prem_calendaryear	cf_inforceestimatepremium	
Inforce Written Premium	Aggregate of written premium amounts whose transaction effective period includes the accounting period. The aggregate does not include written premium amounts whose transaction effective period does not include the accounting period, even if the accounting period falls within the policy effective period. Inforce premium amount is not based on the accounting period being within the policy effective dates, but is based on the accounting period being within the transaction effective dates.	Number	efr_fact_prem_calendaryear	cf_inforcewrittenpremium	
ITD Earned Premium	Earned premium aggregated from the time that a policy originates to the current month.	Number	efr_fact_prem_calendaryear	cf_itd_earnedpremium	
ITD EBUR Premium	EBUR premium aggregated from the time that a policy originates to the current month.	Number	efr_fact_prem_calendaryear	cf_itd_eburpremium	
ITD Estimate Premium	Estimate premium aggregated from the time that a policy originates to the current month.	Number	efr_fact_prem_calendaryear	cf_itd_estimatespremium	
ITD Written Premium	Written premium aggregated from the time that a policy originates to the current month.	Number	efr_fact_prem_calendaryear	cf_itd_writtenpremium	
MTD Earned Premium	Earned premium aggregated for the accounting period month as of the accounting period date.	Number	efr_fact_prem_calendaryear	cf_mtd_earnedpremium	
MTD EBUR Premium	EBUR premium aggregated for the accounting period month as of the accounting period date.	Number	efr_fact_prem_calendaryear	cf_mtd_eburpremium	
MTD Estimate Premium	Estimate premium aggregated for the accounting period month as of the accounting period date.	Number	efr_fact_prem_calendaryear	cf_mtd_estimatespremium	
MTD Written Premium	Written premium aggregated for the accounting period month as of the accounting period date.	Number	efr_fact_prem_calendaryear	cf_mtd_writtenpremium	
QTD Earned Premium	Earned premium aggregated for the accounting period quarter as of the accounting period date.	Number	efr_fact_prem_calendaryear	cf_qtd_earnedpremium	
QTD EBUR Premium	EBUR premium aggregated for the accounting period quarter as of the accounting period date.	Number	efr_fact_prem_calendaryear	cf_qtd_eburpremium	

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Model column name	Description	Type	Source table name	Source column name	Formula
QTD Estimate Premium	Estimate premium aggregated for the accounting period quarter as of the accounting period date.	Number	efr_fact_prem_calendaryear	cf_qtd_estimatedpremium	
QTD Written Premium	Written premium aggregated for the accounting period quarter as of the accounting period date.	Number	efr_fact_prem_calendaryear	cf_qtd_writtenpremium	
Unearned Premium	Unearned premium, aggregated over the accounting period month.	Number	efr_fact_prem_calendaryear	cf_unearnedpremium	
YTD Earned Premium	Earned premium aggregated for the accounting period year as of the accounting period date.	Number	efr_fact_prem_calendaryear	cf_ytd_earnedpremium	
YTD EBUR Premium	EBUR premium aggregated for the accounting period year as of the accounting period date.	Number	efr_fact_prem_calendaryear	cf_ytd_eburpremium	
YTD Estimate Premium	Estimate premium aggregated for the accounting period year as of the accounting period date.	Number	efr_fact_prem_calendaryear	cf_ytd_estimatedpremium	
YTD Written Premium	Written premium aggregated for the accounting period year as of the accounting period date.	Number	efr_fact_prem_calendaryear	cf_ytd_writtenpremium	