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Foundry Training Guide for Carriers

AnnuityNet Platform
May 2009 Release

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607 Herndon Parkway #300, Herndon, VA 20170 • 1441 West Ute Boulevard #340, Park City, UT 84098
www.ebixexchange.com

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This guide is for the functionality provided in the May 2009 release of the AnnuityNet Platform.

Foundry Training Guide for Carriers

EbixExchange is a division of Ebix, Inc. (NASDAQ: EBIX)

For more information on anything contained within this guide, please contact your EbixExchange Client Integration Services project manager.

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1 Introduction

Foundry is a suite of web-based tools created by EbixExchange and is used to administer various aspects of the AnnuityNet Platform. **There is a ProdSim/Production Foundry as well as a UAT Foundry**. Foundry may be used by carrier partners to upload and manage PPfAs, Forms XML and PDFs and to view the status of products on the platforms of distributors with whom the carrier partner has business relationships. Foundry is accessed through the Internet and is secured through SSL on ProdSim and UAT, as well as Perimeter Authentication for UAT. It is also password protected. Please call your EbixExchange Project Manager to obtain your user ID and password.

The purpose of this training guide is two-fold: to take you step by step through the various Foundry tools, and to teach you the specifics of how to upload PPfAs, Forms XML and PDFs. The training guide is geared towards those individuals who are tasked with PPfA, Forms XML and PDF management.

2 Logging into Foundry

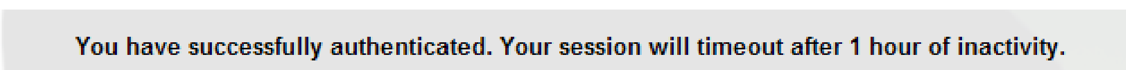
To access Foundry you will go through a two-step procedure (first step only required for UAT). The first step is Perimeter authentication, a security authentication procedure which you will need to pass before entering Foundry. Radius authentication is enforced on connection attempts at our firewall. This technology allows EbixExchange to limit access to Foundry and the UAT environment at the network layer. Please contact your EbixExchange CIS project manager for your Radius security password.

Once you have successfully passed Radius authentication, step two is logging into the Foundry site.

2.1 Perimeter Authentication

Open your internet browser and browse to https://foundry.prodsim.finetre.com/Foundry/ or https://foundry.uat.finetre.com/Foundry/. If your IP address has not authenticated within the last hour, you will be prompted for your Perimeter Authentication login credentials (these are different than your Foundry login credentials but are the same credentials you use to login to UAT). Enter your user information and click Ok. If you do not know your username and/or password, please contact your EbixExchange project manager.

Once you have been successfully authenticated, you'll see a screen with text similar to the example below. (If you go straight to the Foundry login page without first being prompted for user information, it means that a user on your network has already authenticated with EbixExchange and you are all set. That user may have authenticated either for testing in UAT or by using Foundry.)

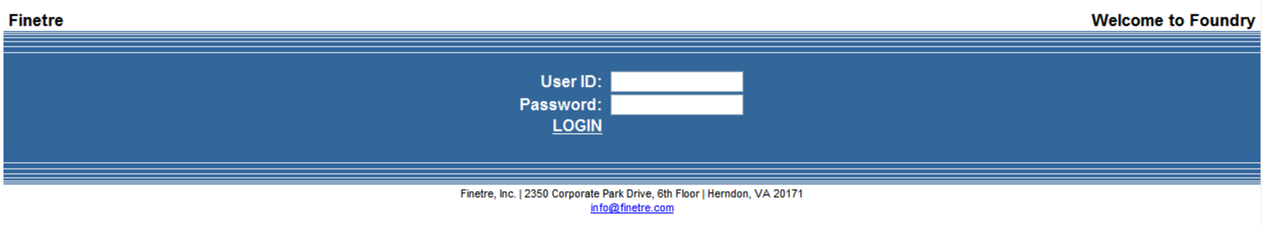


After you successfully browse to the page displayed above, you will be asked to log in to Foundry.

2.2 Log In to Foundry

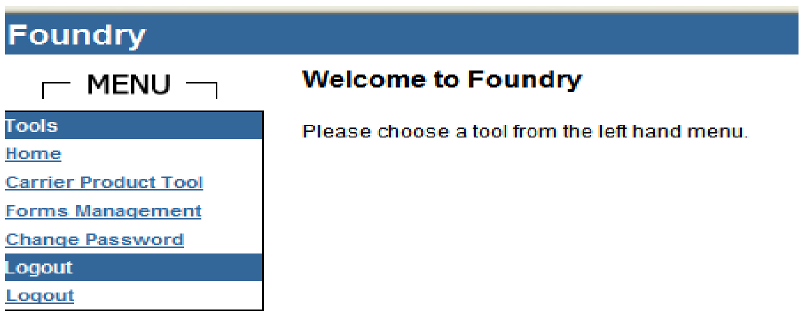
Once authenticated (if UAT), you will be taken to the Welcome to Foundry log in page. Type your user ID and password into the text boxes provided and click on LOGIN. (User IDs and passwords are case sensitive.) If you do not know your username and/or password, please contact your EbixExchange project manager.

Figure 2.2.1



After clicking on LOGIN, you will be taken to the homepage for your Foundry site. See Figure 2.2.2.

Figure 2.2.2

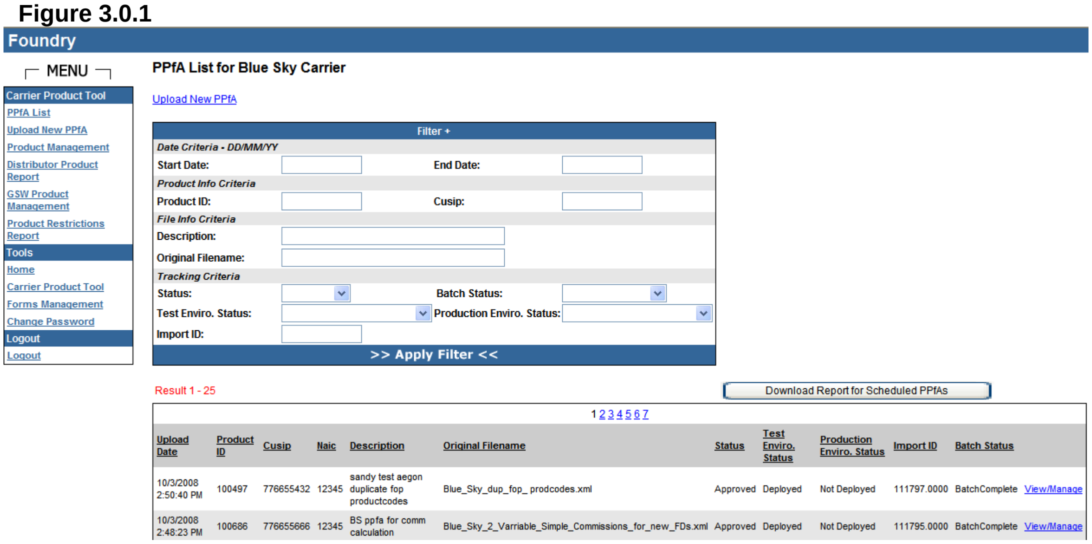


3 Carrier Product Tool

The *Carrier Product Tool* is used to upload and manage PPfAs. When you click on Carrier Product Tool in the left-hand navigation menu you will be transferred to the PPfA Import Tool.

The PPfA List page shows you a list of recently uploaded PPfAs and the status of each. Use the filter to narrow down the PPfA search. See Figure 3.0.1.

Figure 3.0.1



The list contains the following information for each PPfA:

Upload date: Date/Time the PPfA was loaded into Foundry.

Product ID: Unique identifier assigned to a product by EbixExchange.

Cusip: Unique identifier for financial instruments. Short for the American Bankers Association's *Committee on Uniform Security Identification Procedures*.

NAIC: Unique identifier for statutory companies assigned by the National Association of Insurance Commissioners.

Description: Displays what the user entered in this field during upload.

Original Filename: Filename of the loaded PPfA.

Status: The status for a PPfA will be one of the following:

- Added - Item has been uploaded and is waiting for import processing
- Imported - Import process and validation for the item is complete
- Approved - Imported item has been approved for further use
- Rejected - Item has been rejected and cannot be used

Test Enviro. Status: Indicates the status of the PPfA in the test environment (Production Simulation a.k.a. ProdSim or User Acceptance Testing a.k.a. UAT).

- Queued – mainly an EbixExchange status. Doesn't appear in this status for long.
- Staged – this version will move to ProdSim/UAT with the next scheduled metadata deployment.
- In Process – mainly an EbixExchange status. Doesn't appear in this status for long.
- Deploying – this version is being deployed to ProdSim/UAT.
- Deployed – the version currently available in ProdSim/UAT.
- Not Deployed - the PPfA is not in ProdSim/UAT - either another PPfA has been deployed to this environment and superseded it or it was never deployed to the ProdSim/UAT environment. Staged & Deployed – this version has been deployed before and is staged to be deployed at this point.
- DeployedWithErrors – the PPfA was deployed but there may have been problems with other resources related to the PPfA – Very rare.
- Failed – was not deployed the last time Foundry tried to deploy it. Check emails for cause.
- Scheduled for Deployment – processing will occur upon the scheduled date.

Deployments to ProdSim/UAT occur daily beginning at Midnight and continue every 90 minutes. Any products that have completed the batch process will be deployed at that time. The length of the deployment depends on how much metadata is included in that deployment.

Production Enviro. Status: Indicates the status of the PPfA in the Production environment.

- Queued – mainly an EbixExchange status. Doesn't appear in this status for long.
- Staged – this version will move to Production with the next scheduled metadata deployment.
- In Process – mainly an EbixExchange status. Doesn't appear in this status for long.
- Deploying – this version is being deployed to Production. Deployed – the version currently available in Production.
- Not Deployed - the PPfA is not in Production - either another PPfA has been deployed to this environment and superseded it or it was never deployed to the Production environment.
- Staged & Deployed – this version has been deployed before and is staged to be deployed at this point.
- DeployedWithErrors – the PPfA was deployed but there may have been problems with other resources related to the PPfA – Very rare.
- Failed – was not deployed the last time Foundry tried to deploy it. Check emails for cause.
- Scheduled for Deployment – processing will occur upon the scheduled date.

For a schedule of Production deployments, see the published EbixExchange Production Calendar. Typically, Foundry/Metadata deployments occur Monday-Friday at 5:30pm EST.

Import ID: Unique number assigned to each PPfA after it is imported into Foundry or Reprocessed.

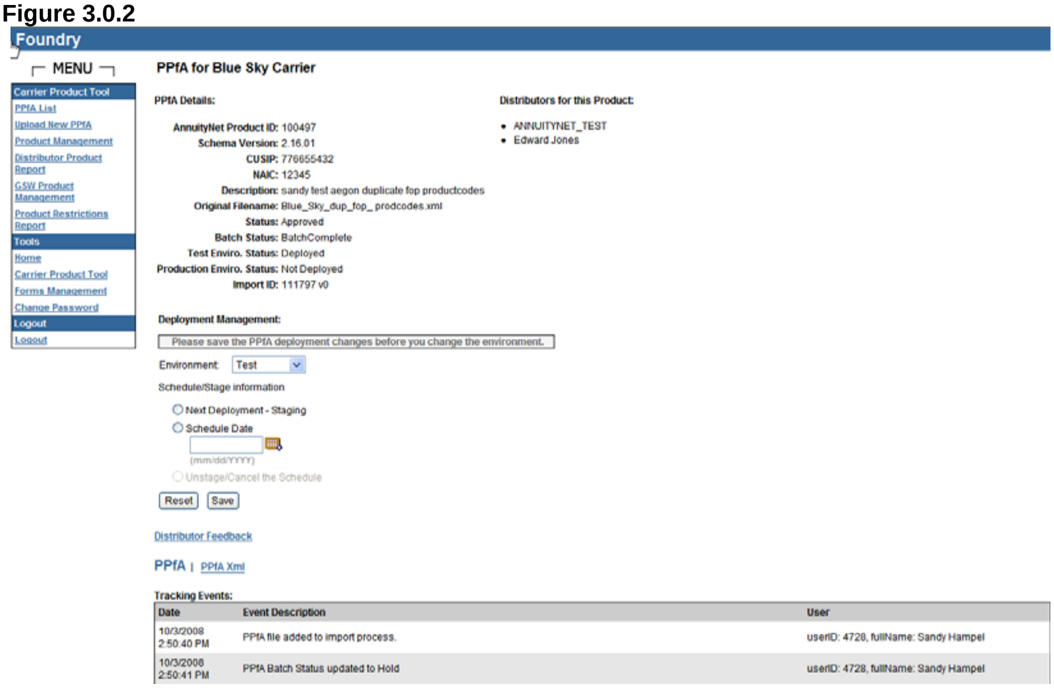
Batch Status: Indicates the processing status of the PPfA. After PPfAs are imported, they get placed in a queue and Foundry processes each PPfA in the order they were put in.

- Batch – your metadata will be batched shortly
- BatchStarted – the batch process has begun
- BatchIncomplete – the batch failed. Please check your emails for the cause.
- BatchComplete – the batch completed successfully and will be staged.
- Hold – internal EbixExchange status only
- Manual – internal EbixExchange status only

The filter provided at the top of the PPfA List page allows you to find specific PPfAs based on certain criteria. This is useful if the carrier has many PPfAs and would like to find a particular PPfA or related PPfAs. You would fill in the boxes with the criteria on which to filter the PPfA list and click Apply Filter. The results will show in the PPfA list below.

The view/manage link, which is at the end of each row in the PPfA list, takes you to a page that provides details about the specific PPfA. See Figure 3.0.2. This page is very useful when trying to see a summary of the PPfA. You can review State, Plan, Feature, and Commission Availability by Distributor. Always refer to the actual XML for final confirmation of details. Tracking Events shows you in which stage of the process the PPfA is. There is also a date and time stamp for each action.

Figure 3.0.2

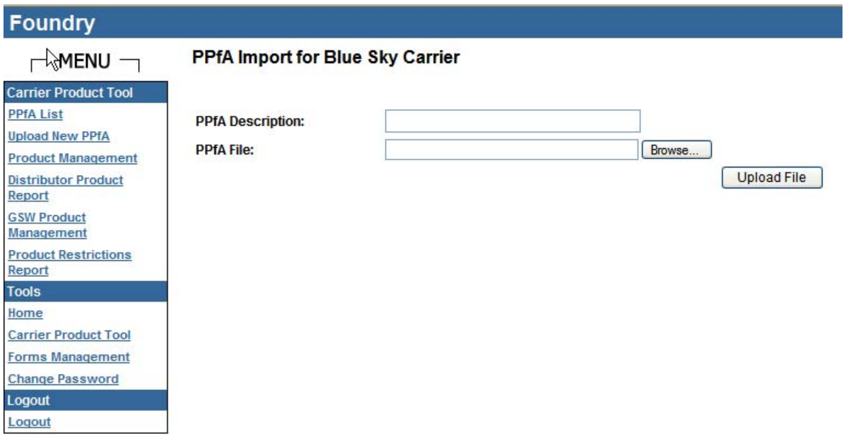


4 How to Upload a New PPfA

4.1 To upload a new PPfA

1. Click on Upload New PPfA in the Menu list. You will be sent to the PPfA Import page. See Figure 4.1.1.

Figure 4.1.1



2. Click on the Browse button.

3. Locate (find) the PPfA file on your local computer or network and click on it.

4. The PPfA file name will appear in the PPfA File box.

5. Type in a description or name for the product. To avoid confusion, consistency with naming conventions is important. Be sure the description provides enough information to manage your PPfAs effectively i.e. product name, what was included in this update, etc.

6. Click on the Upload File button. At this point, the PPfA will be validated against the ACORD TxLife schema and EbixExchange's business validation rule set (additional validation checks to ensure that the PPfA contains the necessary data to produce a fully functional product wizard). You may get either validation warnings (which are common) or validation errors.

Validation **warnings** will not prohibit you from completing the upload of the PPfA. Validation warnings, however, are generally indicative of deprecated functionality or deviation from PPfA modeling best practices and should be corrected. If you receive Warnings, you may click the Continue button. You will be transferred back to the PPfA List. The new PPfA that you uploaded is shown at the top of the list. The status for the PPfA will be "Added", the Test Enviro. Status will be "Not Deployed" and the Production Enviro. Status will be "Not Deployed".

Validation **errors** are serious errors in the PPfA and will not allow you to upload the PPfA. The errors will need to be corrected before the PPfA can be uploaded successfully. If you receive validation errors, then the PPfA will not be added to the PPfA List. Validation errors are displayed in red text on the screen.

If a PPfA fails to import successfully, an e-mail will be sent to the designated carrier contact. See Section 11 for a complete list of e-mail notifications and timing of e-mails.

After a PPfA is uploaded, it undergoes further system processing and translation in order to be prepared for use by the AnnuityNet platform and Baseline Wizard. PPfAs are processed continuously in a first-in-first-out sequence. After a PPfA is processed successfully for the first time, its status will be “Approved”.

After upload and processing, PPfAs are deployed to ProdSim/UAT for those distributor platforms designated in the PPfA. If the PPfA is for a new product or one that has not previously been available for a given distributor, the product will have to be turned ON for the distributor (this includes your test site) in order to view the product in ProdSim/UAT.

Deployments to ProdSim/UAT occur daily beginning at Midnight and thereafter, continue every 90 minutes. Any products that have completed the batch process will be deployed at that time. The length of the deployment depends on how much metadata is included in that deployment. Once a PPfA has been deployed to ProdSim/UAT, the Test Enviro. Status column will read “Deployed”.

To deploy a PPfA to production, see section 8.

4.2 View All Product PPfAs

To view all the products for your firm, you must click on Product Management in the menu. You will see a list of all products for which a PPfA has been successfully uploaded or for which a GSW has been created (see Figure 4.2.1.). Clicking on the hyperlink for the product allows you to view further details about the product (e.g. its AnnuityNet Product ID and deployment status) (see Figure 4.2.2). In this view, you are able to see if a given product is turned ON or OFF for those distributors included in the most recently deployed PPfA for that product. You are also able to filter by Test or Production.

Figure 4.2.1

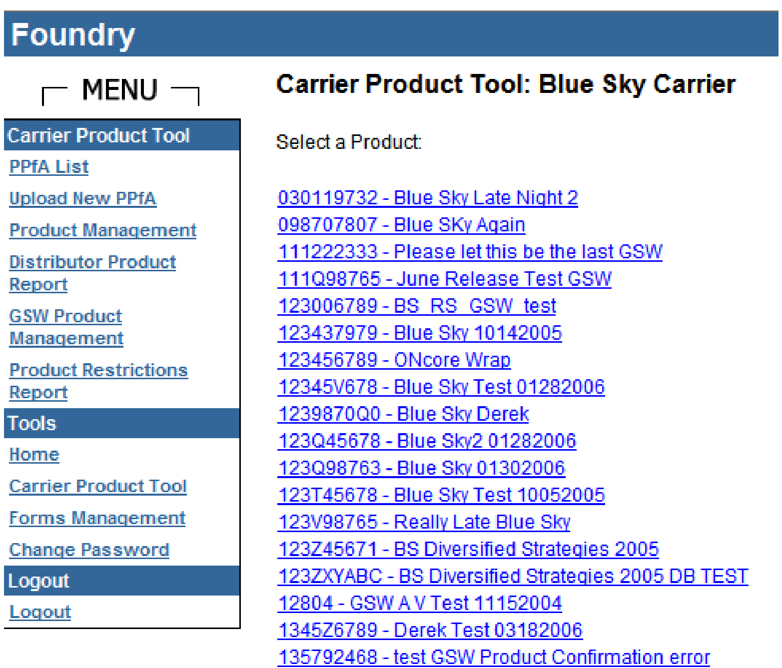
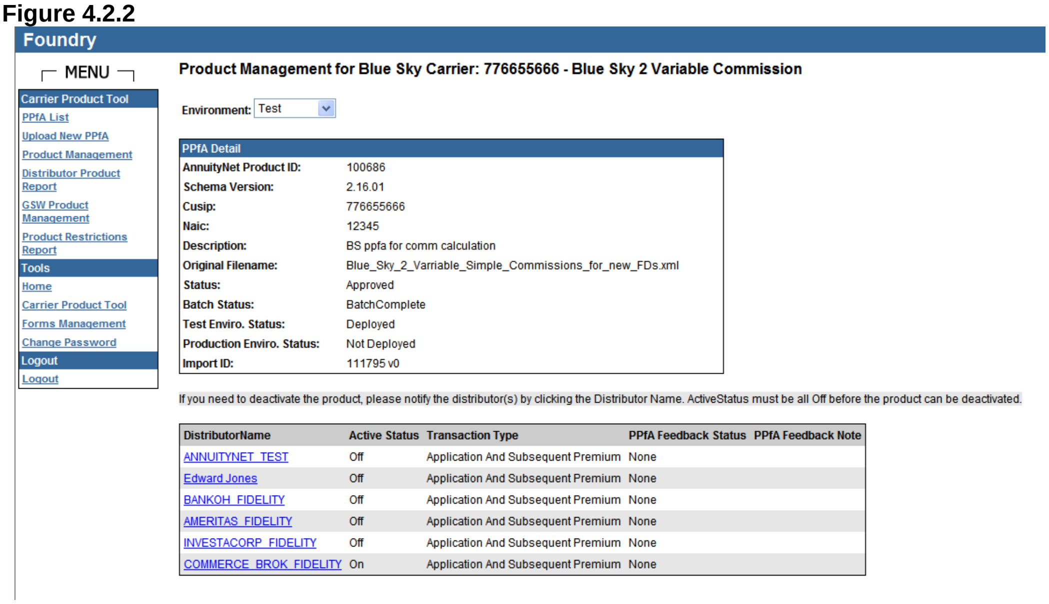


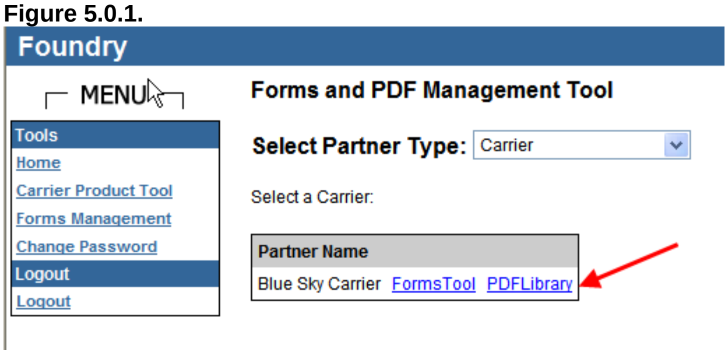
Figure 4.2.2


Foundry
MENU
Carrier Product Tool
PPfA List
Upload New PPfA
Product Management
Distributor Product Report
GSW Product Management
Product Restrictions Report
Tools
Home
Carrier Product Tool
Forms Management
Change Password
Logout
Logout
Product Management for Blue Sky Carrier: 776655666 - Blue Sky 2 Variable Commission
Environment: Test
PPfA Detail
AnnuityNet Product ID: 100686
Schema Version: 2.16.01
Cusip: 776655666
Naic: 12345
Description: BS ppfa for comm calculation
Original Filename: Blue_Sky_2_Varriable_Simple_Commissions_for_new_FDs.xml
Status: Approved
Batch Status: BatchComplete
Test Enviro. Status: Deployed
Production Enviro. Status: Not Deployed
Import ID: 111795 v0
If you need to deactivate the product, please notify the distributor(s) by clicking the Distributor Name. ActiveStatus must be all Off before the product can be deactivated.
DistributorName | Active Status | Transaction Type | PPfA Feedback Status | PPfA Feedback Note
ANNUITYNET_TEST | Off | Application And Subsequent Premium | None
Edward Jones | Off | Application And Subsequent Premium | None
BANKOH_FIDELITY | Off | Application And Subsequent Premium | None
AMERITAS_FIDELITY | Off | Application And Subsequent Premium | None
INVESTACORP_FIDELITY | Off | Application And Subsequent Premium | None
COMMERCE_BROK_FIDELITY | On | Application And Subsequent Premium | None

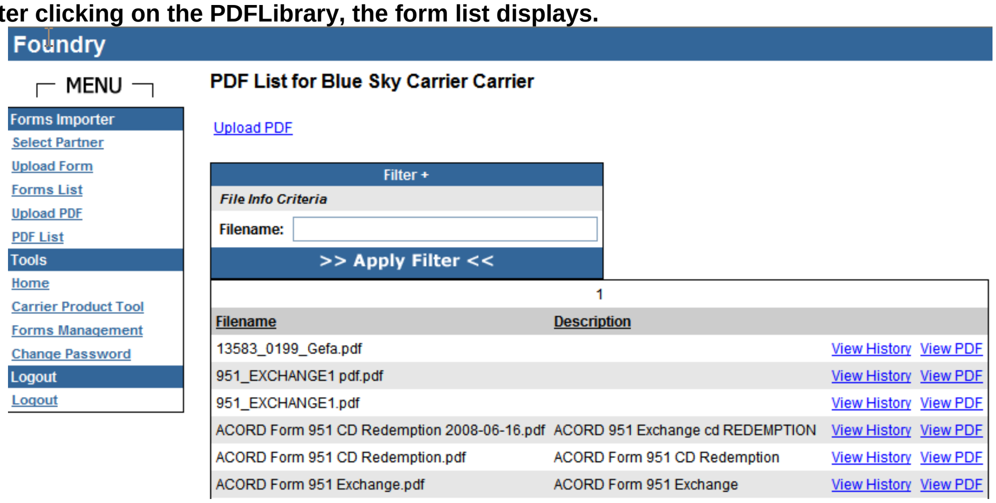
5 PDF List

To view a list of all PDFs that have been uploaded, you must select Forms Management from the MENU and then click on PDFLibrary when transferred to the Forms and PDF Management screen (See Figure 5.0.1). The link will take you to the PDF List page. All the PDFs that have been uploaded will be listed and you can see the Filename and the Description. You may view the history of a particular PDF (including upload and deployment events) by clicking on the View History link or view the actual PDF by clicking on the View PDF link.

Figure 5.0.1.



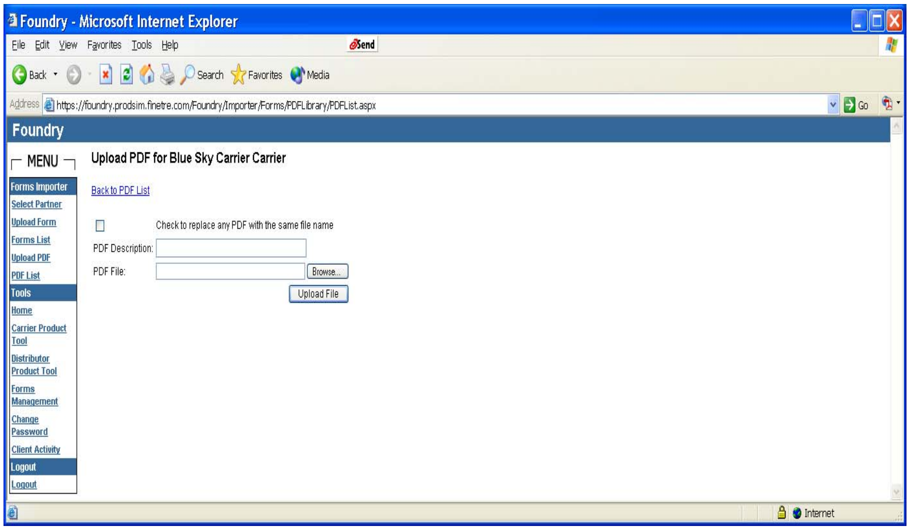
After clicking on the PDFLibrary, the form list displays.



To upload a PDF, complete the following steps:

1. Click on <u>Upload PDF</u>. This will take you to the Upload PDF page. See Figure 5.0.2.

Figure 5.0.2



Click on the box next to the sentence “Check to replace any PDF with the same file name”.

WARNING! Pay careful attention when uploading PDFs. When you click the checkbox to replace any PDF files with the same name, the older version of the PDFs WILL BE REPLACED. After uploading new PDFs, you must upload the appropriate Forms XML that references the new PDF. Be sure to upload the Forms XML by following the steps in Section 6.

2. Click on the Browse button.

3. Find the file that contains the PDF or zipped PDFs on your local computer or network.

4. Click OK.

5. Click on the Upload File button.

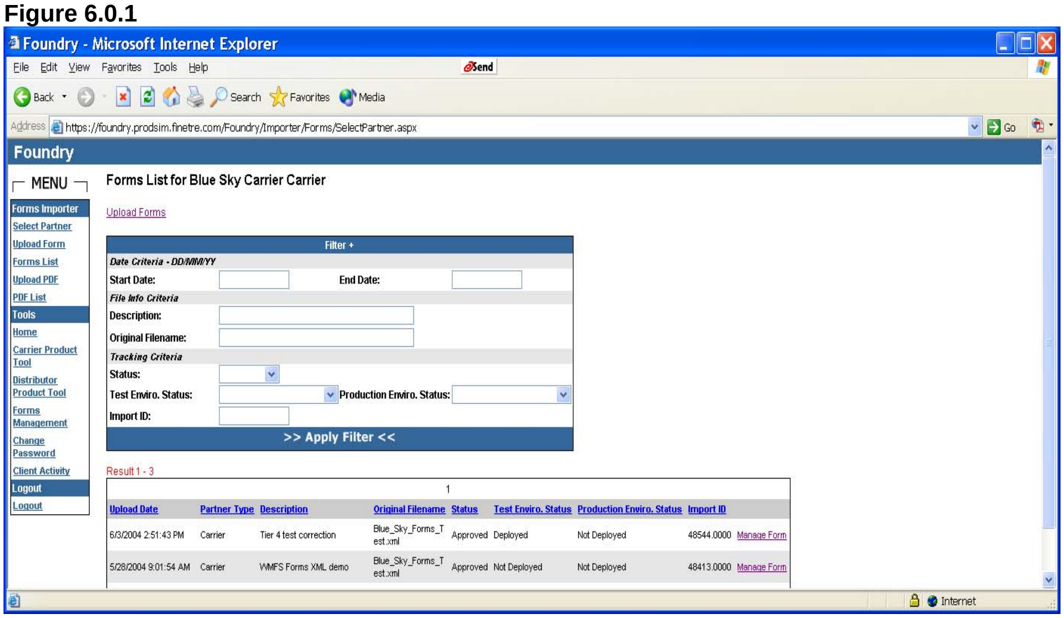
6. A list of PDFs will appear indicating that they were uploaded with no warnings/errors, or it will list the warnings/errors. If errors are detected in the PDFs, a list of the errors will appear in the window and the PDFs will not be uploaded. You will need to correct the errors and try uploading the PDFs again. Be sure to copy the warnings/errors before leaving this screen. They are not archived anywhere. You can view them again by trying to reload the PDFs if necessary.

7. If you did not need to upload a new Forms XML with the PDF (for example if it was an update to a previously uploaded PDF), you must still deploy an XML to pull in the new PDF. To redeploy a prior version, go to the Forms List, click on View/Manage for the version you would like to redeploy (usually the last one Deployed to ProdSim/UAT); and click on Deploy to Test. This will ensure that the PDFs are mapped to the appropriate Forms XML. The newly uploaded PDFs will be available in ProdSim/UAT when the Forms XML has been deployed to that environment.

6 Forms Management (Forms XML)

The Forms Management tool is used to manage Forms XML and PDFs. Forms XML describes the rules for generating PDFs for applications entered on the AnnuityNet platform. When you click on Forms Management in the Menu, you will see the Forms and PDF Management Tool page.
To upload and manage Forms XML, click on Forms Tool. This link takes you to the Forms List page. See Figure 6.0.1.

Figure 6.0.1



The Forms List page is very similar in appearance to the PPfA List page. There is a filter at the top of the page for finding specific or related forms. The Forms list contains the following information for each form:

Upload date: Date the Forms XML was loaded into Foundry.

Partner Type: Lists whether the partner who generated the Forms XML is a carrier or a distributor.

Description: Displays what the user entered in this field during upload.

Original Filename: Filename of the loaded Forms XML.

Status: The status for a Forms XML will be one of the following:

- Added - Item has been uploaded and is waiting for import processing
- Imported - Import process and validation for the item is complete
- Approved - Imported item has been approved for further use
- Rejected - Item has been rejected and cannot be used

Test Enviro. Status: Indicates the status of the Forms XML in the test environment (Production Simulation a.k.a. ProdSim or User Acceptance Testing a.k.a. UAT).

- Not Deployed - the Forms XML is not in ProdSim/UAT - either another Forms XML has been deployed to this environment and superseded it or it was never deployed to the ProdSim/UAT environment.
- Deployed - the Forms XML is the version currently available in ProdSim/UAT.
- Staged for Deployment - the Forms XML will move to ProdSim/UAT with the next scheduled deployment.
- In Process
- Deploying
- DeployedWithErrors
- Failed

Deployments to ProdSim/UAT occur every 30 minutes, 24 x 7. Any Forms XML that has completed the batch process will be deployed at that time. The length of the deployment depends on how much metadata is included in that deployment.

Production Enviro. Status: Indicates the status of the Forms XML in the Production environment.

- Not Deployed - the Forms XML is not in Production - either another Forms XML has been deployed to this environment and superseded it or it was never deployed to the Production environment.
- Deployed - the Forms XML is the version currently available in Production.
- Staged for Deployment - the Forms XML version will move to Production with the next scheduled deployment.
- In Process
- Deploying
- DeployedWithErrors
- Failed

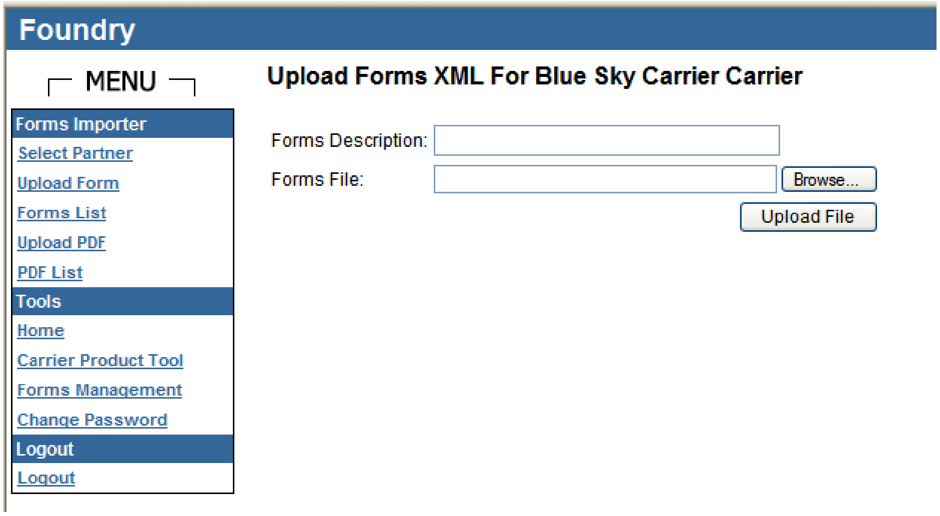
For a schedule of Production deployments, see the published EbixExchange Production Calendar. Typically, Foundry/Metadata deployments occur Monday-Friday at 5pm EST.

Import ID: Unique number assigned to each Forms XML after it is loaded into Foundry.

To upload Forms XML, complete the following steps:

8. Click on Upload Form. You will be sent to the Upload Forms XML page. See figure 6.0.2.

Figure 6.0.2



9. Type in a description or name for the Forms XML. To avoid confusion, consistency with naming conventions is important. Be sure the description provides enough information to manage your forms effectively i.e. XML version, what was included in this update, etc.

10. Click on the Browse button.

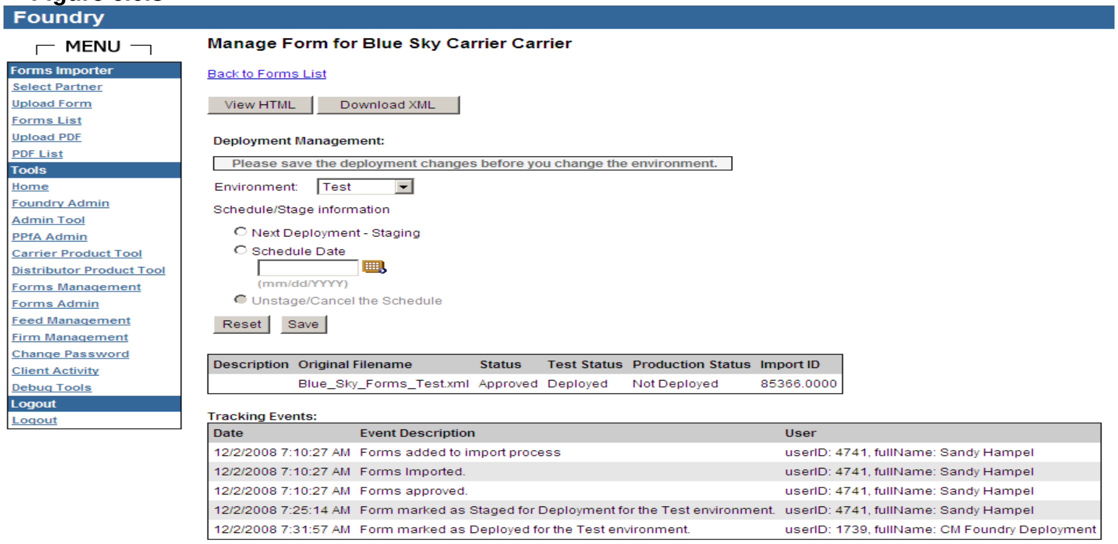
11. Find the Forms XML document on your local computer or network.

12. Click OK.

13. Click the Upload File button.

14. When the upload is complete and the file status is Not Deployed, you **must** select the Manage Form link to stage the Forms XML by either selecting Next Deployment – Staging or the Schedule Date option and then select Save. See Figure 6.0.3.

Figure 6.0.3



15. Select the Back to Forms List link and the Apply Filter to display the list of forms XML files. The uploaded Forms XML file will appear at the top of the Forms List.

After a Forms XML is uploaded, it undergoes further system processing and translation in order to be prepared for use by the AnnuityNet platform and Baseline Wizard. Forms XML are processed continuously in a first-in-first-out sequence. After a Forms XML is processed successfully for the first time, its status will be “Approved”.

After upload and processing, Forms XML are deployed.

Foundry deployment deploys the Forms along with PPfAs.

Environment	Deployment Frequency	What Deployment does
UAT	Every 15 minutes 24x7	• Schedule Forms will be staged & Deployed if staged successfully • Schedule PPfAs will be staged & Deployed if staged successfully • Staged Forms will be deployed • Staged PPfAs will be deployed
ProdSim	Every hour 24x7	-Same as above-
Production	Daily at 5.30 PM on Weekdays (Mon - Fri), including holidays	-Same as above-

Any Forms XML that have completed the batch process will be deployed at that time. The length of the deployment depends on how much metadata is included in that deployment. Once a Forms XML has been deployed to ProdSim/UAT, the Test Enviro. Status column will read “Deployed”.

To deploy a Forms XML to production, see section 8.

7 Testing Products in ProdSim/UAT

EbixExchange provides each carrier partner with two platforms on which to test their product changes and various configuration options. These platforms consist of a base AnnuityNet distributor platform that emulates the end user experience for the various job functions at the typical distributor. One is set up to emulate a Distributor-DTCC setup, and one is set up to emulate a Distributor-Direct to Carrier setup.
In order to test a **new** product in the carrier's test distributor platform following the successful upload and deployment of the product, you will need to turn the product ON in ProdSim/UAT depending on which Foundry you loaded the product to. **This step will only be done the first time a PPfA is processed for a new product.** If a PPfA for the product had previously been uploaded, was deployed successfully to the ProdSim/UAT environment, and had been turned ON, you do not need to reactivate the product each time a PPfA revision is submitted for the product.

To turn a product ON or OFF in ProdSim/UAT, you must click on the Distributor Product Tool in the menu. This link will take you to the Distributor Product Tool page. There you will see two links listed as follows:

Your Insurance Company NSCC
Your Insurance Company XML

The two links will take you to a page where you can control which products are available to test in ProdSim/UAT. As a standard practice, carriers are set up with two links which correspond to their ProdSim/UAT test environments.

- If you receive transaction detail from DTCC/NSCC, use the NSCC link to turn products ON and OFF.

- If you receive transaction detail direct in XML format via FTP (not through DTCC/NSCC), use the XML link to turn products ON and OFF.

The steps for activating a product are the same for both test distributor platforms.

To turn a product ON or OFF in ProdSim/UAT, you should complete the following steps:

16. Click on one of the following links:

Insurance Company NSCC
or
Insurance Company XML

17. You will be directed to the Product Management page. You must apply a filter before any products will appear. Simply clicking Apply Filter with no criteria entered will bring up the entire list. The products available for the ProdSim/UAT environment are listed on this page. (You will see the word “Test” in the Filter box for Environment. This confirms that the products shown on the page are available for the ProdSim/UAT environment.)

18. The check boxes on the left indicate whether the products is on (checked) or off (not checked). You can also verify this by looking at the Active Status column.

.

19. Check the checkbox to make a product available in ProdSim/UAT.

20. Uncheck the checkbox to make a product unavailable in ProdSim/UAT.

21. Once you have checked/unchecked as desired, you will see a list of Product ID’s above the product list section. Once you confirm these are correct, you need to click the Submit button at the bottom of the page.

You can check/uncheck items on various pages before hitting Submit and all changes will be applied.

NOTE: As further revisions of the PPfA for a product are uploaded, the product will be updated in the ProdSim/UAT environment only when you choose to deploy another version of the PPfA.

8 Moving a PPfA/Forms XML to Production

8.1 Moving a PPfA to Production

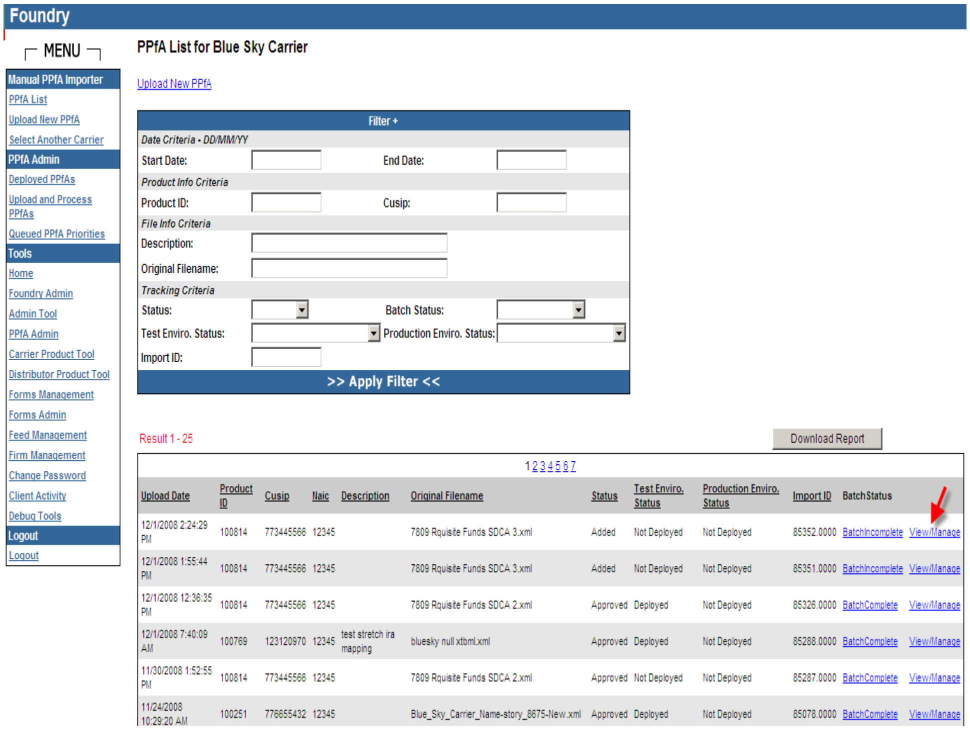
To make a PPfA or product available in Production, complete the following steps:

22. Click on Carrier Product Tool in the menu. This will take you to the PPfA List.

23. In the column Import ID, find the tracker number for the PPfA that you want to deploy to production. You can also use the Filter to find a specific CUSIP or Import ID (aka tracker number).

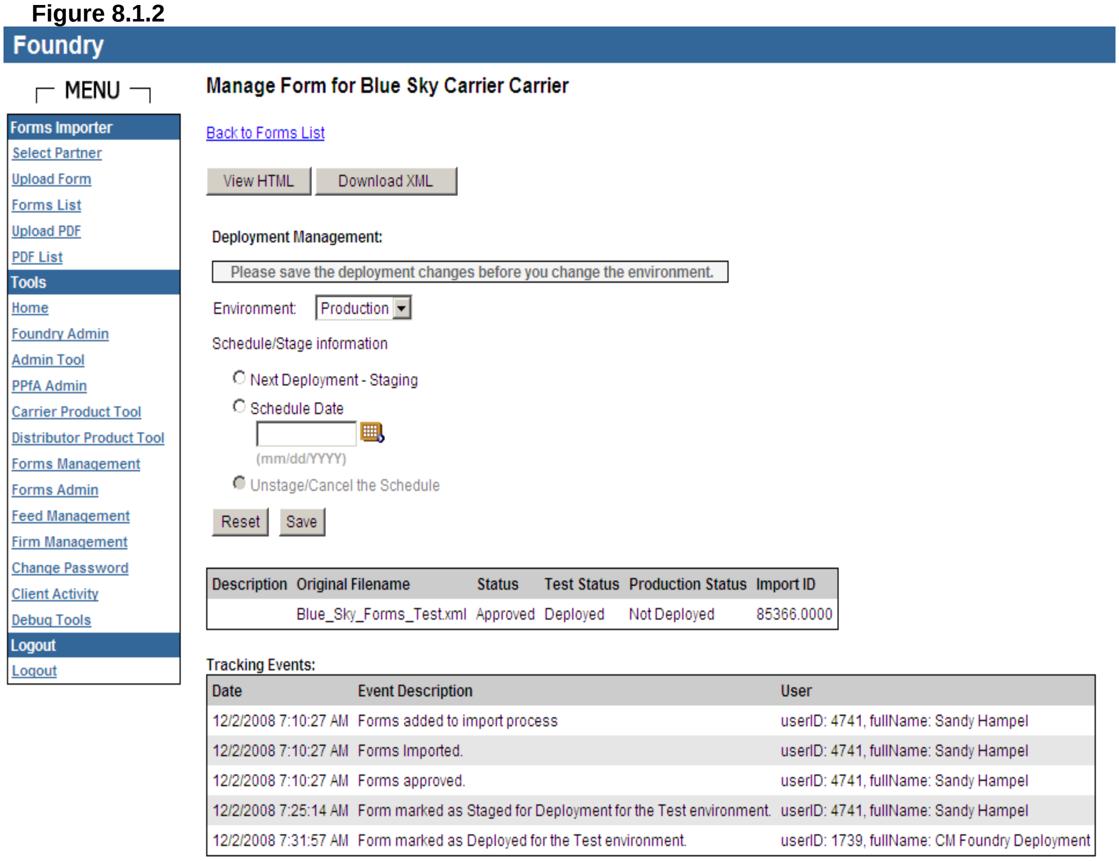
24. Click on the View/Manage link.

Figure 8.1.1



After clicking the View/Mange link, the PPfA details display.

Figure 8.1.2



Select Production in the Environment drop down list and select either Next Deployment – Scheduling or enter a Schedule Date.

8.2 Making Forms XML or PDFs available in Production

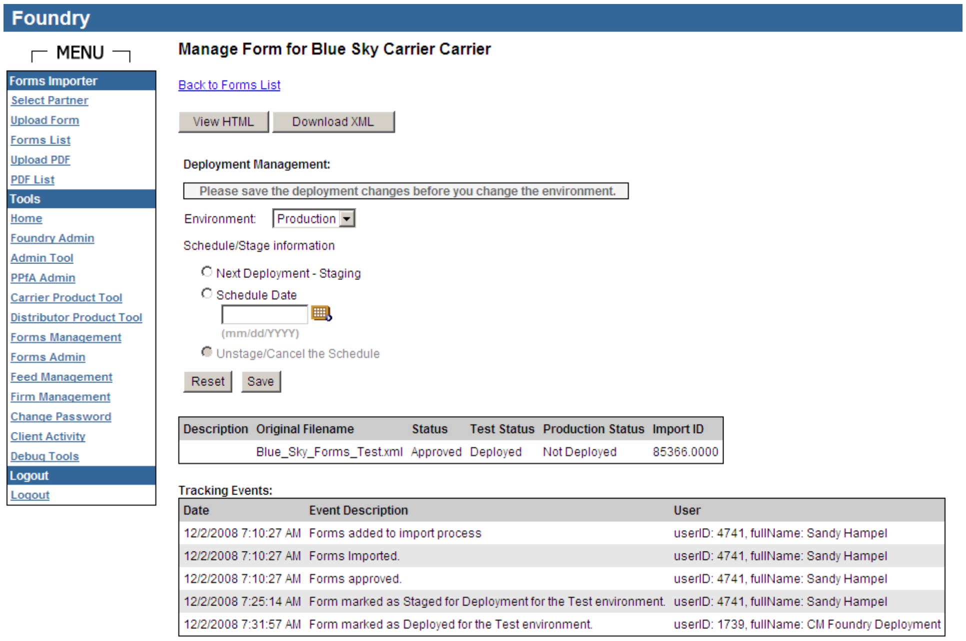
25. Click on Forms Management in the Menu. This will take you to the Forms and PDF Management Tool.

26. Click on the Forms Tool link. This will take you to the Forms List.

27. Click on the Manage Form link for the Forms XML you want to deploy. If you haven't updated the XML but have loaded new PDF's, you don't need to specifically deploy the PDF's but you do need to deploy an XML to pull in the updated PDFs.

28. Select Production from the Environment drop down list, and select with Next Deployment-Scheduling or enter in a Schedule Date. See Figure 8.2.1

Figure 8.2.1



8.3 Staging FormXML or PPfAs

The scheduled date processing functionality is now available for PPfAs and FormsXML. When the PPfA is uploaded or redeployed with a future schedule date, once the date is met, the PPfA will apply that PPfA to production. When the Forms XML is uploaded or redeployed with a future schedule date, once the date is met, the Forms XML will assemble the most current PDFs and apply the latest forms and Forms XML to production.

When selecting the **Next Deployment – Scheduling** option, the PPfA or Forms XML will process during the next scheduled deployment. Staging for PPfAs will not occur immediately; rather it will be performed at the last moment when the deployment process begins. When selecting “Next Deployment” prior to 5:30pm EST, the PPfA will process on that day’s deployment schedule, otherwise it will be processed on the following day.

When selecting the **Schedule Date** option, the user will enter a date at which the deployment process will occur when that date is reached.

The **Unstage/Cancel the Schedule** option is only available for PPfA and Form XML files that have a *Schedule for ##/##/####* status. When Manage Form is selected for previously scheduled PPfAs or Form XML files, the Unstage/Cancel the Schedule option becomes available for selection.

When the Unstage/Cancel the Schedule option is selected and saves, a message **PPfA or Forms XML file successfully unscheduled in [Test or Production] Environment** will display at the top of the screen and the PPfA or Forms XML is no longer available for deployment and the status is set to Not Deployed.

You are no longer required to submit sign off sheets to your Project Manager if you are only uploading updated PPfA’s. Please continue to submit your Sign-Off sheet to your Project Manager if there are new products for a distributor. EbixExchange is responsible for turning products on and off in ProdSim/UAT and Production environments for all distributors. This will change in the future.

9 Adding Carrier Page questions/questionnaires

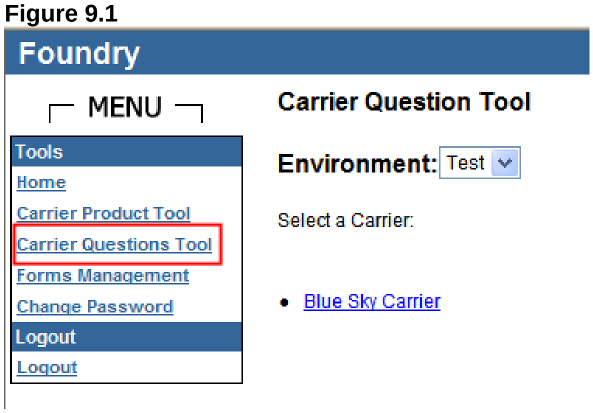
Carriers can add questions to AnnuityNet using the carrier tool in Foundry. Carriers will group their questions into questionnaires by payment type and transaction type. Each questionnaire can have logic added to provide product, state, payment, and transaction level appearance rules.

Additionally, a change control process exists for Distributors to activate/deactive questions. This allows the distributor to maintain control over their platform.

9.1 Accessing the Carrier Page

Log into Foundry and click on the link in the menu for the Carrier Questions Tool. In UAT, there is an environment box, notifying carriers that these changes only apply in Test. In ProdSim Foundry, this box is a drop-down that will allow carriers to maintain their carrier page questions in ProdSim (test) and Production. By selecting "test" in the drop-down, the questions, question list, and questionnaires will be maintained in ProdSim. By selecting "Production" in the drop-down, the questions, question list, and questionnaires will be maintained in Production.

Figure 9.1

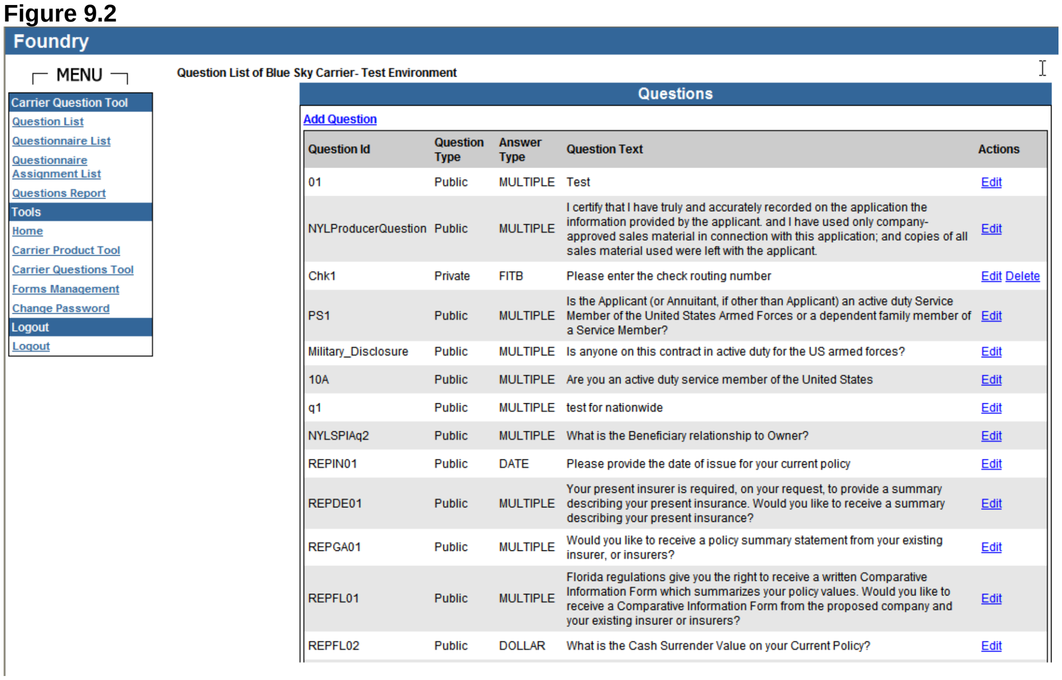


9.2 Carrier Page Set-up

After selecting your environment, three links will appear in the left navigation bar for Question List, Questionnaire List, and Questionnaire Assignment. The user may select any of the three links to complete the Carrier Page set-up actions.

- Question List: Add Carrier questions (Each question can be made private or public. If a question is public, it will display for every Carrier. It will act as a master list. Questions that need to be added to the DTCC file, will need to be public questions that are controlled by EbixExchange. If a question is private, the question will only display for that Carrier.)
- Questionnaire List: Add/edit/delete questionnaires
- Questionnaire Assignment*: Assign questionnaire logic

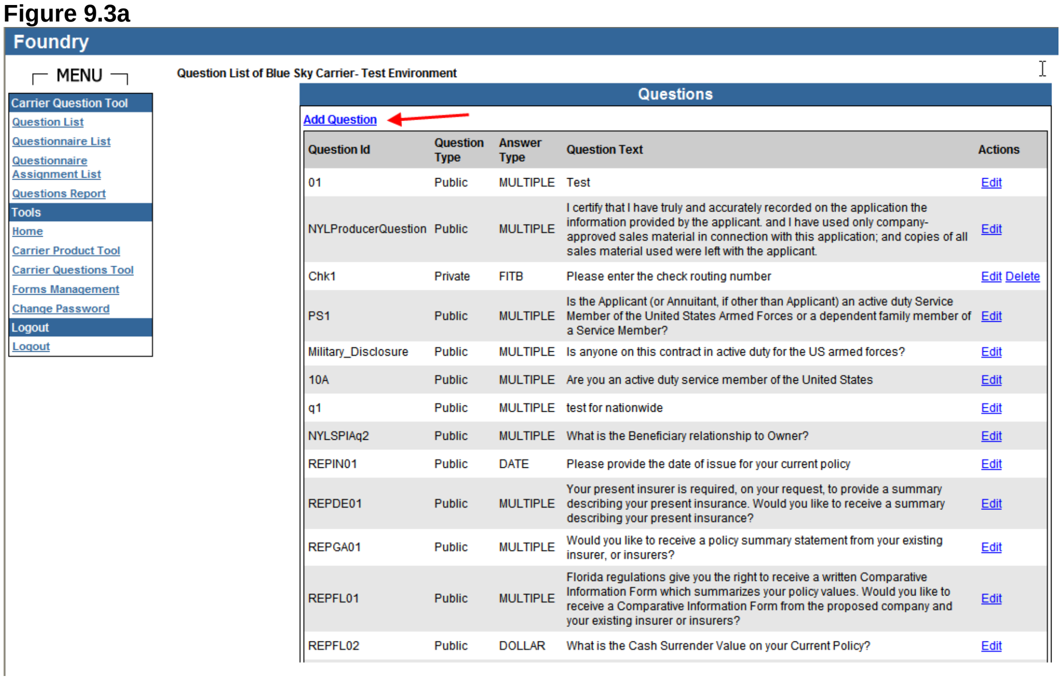
Figure 9.2



9.3 Create/Edit Carrier Questions

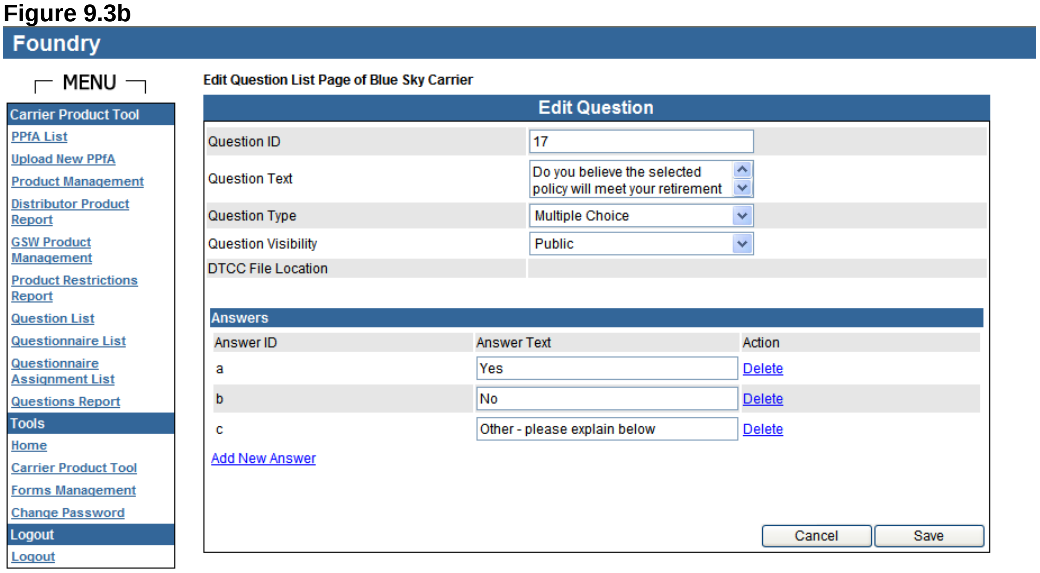
To create or view Carrier questions, the user will access the Question List link in the Foundry Carrier Product Tool. The user will then be taken to a master list of Carrier questions. To add a question to the list, click on the Add new question link.

Figure 9.3a



The user will be taken to a screen to complete the Question Page. Add the required fields and save.

Figure 9.3b



QuestionID: A unique Question ID for each question is required. This ID will be used to create the NI for forms population.

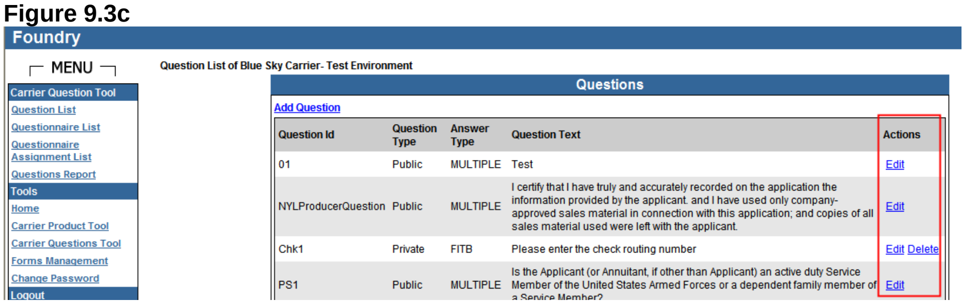
- **Question Text:** This is the text of the question as it will appear on AnnuityNet. Please be sure to double check the spelling.
- **Question Type:** Multiple Choose, Dollar, Date, Percentage, Text, and No response (used as headings for questions)
- **Question Visibility:** Private and Public
  - Private – only the carrier creating the question will see it in the question list
  - Public – all carriers will see this question in the question list. Questions that need to be added to the DTCC file, will need to be public questions controlled by EbixExchange. *Note,* Ebix will require a WR to add the mapping to include questions in the DTCC file. Since Public questions can be added to questionnaires by any carrier, Public questions are only editable by EbixExchange. Carriers will not have the option to Edit or Delete. The user can click on the Edit link to view the allowed answers but the save link is removed. This is to avoid a user changing a question that is already included in another carrier's questionnaires. It is for that reason, that public questions should be limited to DTCC mapped question.
  - Please contact your CIS Project Manager if your firm needs a carrier question included in the DTCC App/Sub file or corrections are needed to a Public question.
- **DTCC File Location:** This is an EbixExchange field that will be completed if a carrier question is included in the DTCC App/Sub file. Note, Ebix will require a WR to add the mapping to include questions in the DTCC file. Please contact your CIS Project Manager if your firm needs a carrier question included in the DTCC App/Sub file.

Answers

- **AnswerID:** The system will generate a unique AnswerID for all multiple choose questions starting with a, b, c, d, etc. through z. after z, start with aa, ab, ac, ad, etc. This ID will be used to create the NI for forms population.
- **Answer Text:** This is the text of the multiple choose answer options as it will appear on AnnuityNet. Please be sure to double check the spelling.

Once questions have been added, each question will appear in the question list page in a separate row. In each row the Question ID, Question Type, Answer Type, and Question Text will be displayed. The action links to Edit and Delete questions will be displayed to the far right. By clicking these links the user can either edit the question or remove it completely. Since Public questions can be added to questionnaires by any carrier, Public questions are only editable by EbixExchange. Carriers will not have the option to Edit or Delete. The user can click on the Edit link to view the allowed answers but the save link is removed. This is to avoid a user changing a question that is already included in another carrier's questionnaires. It is for that reason, that public questions should be limited to DTCC mapped question. If corrections are needed to Public carrier questions, please contact your CIS Project Manager.

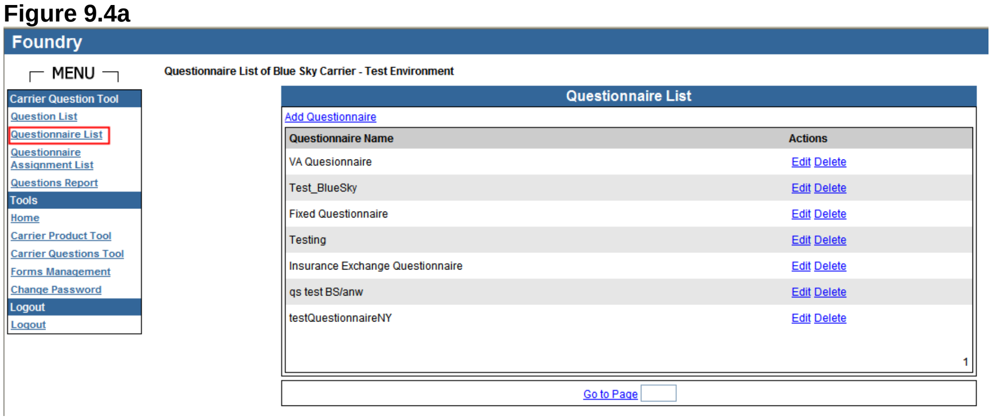
Figure 9.3c



9.4 Building a Questionnaire

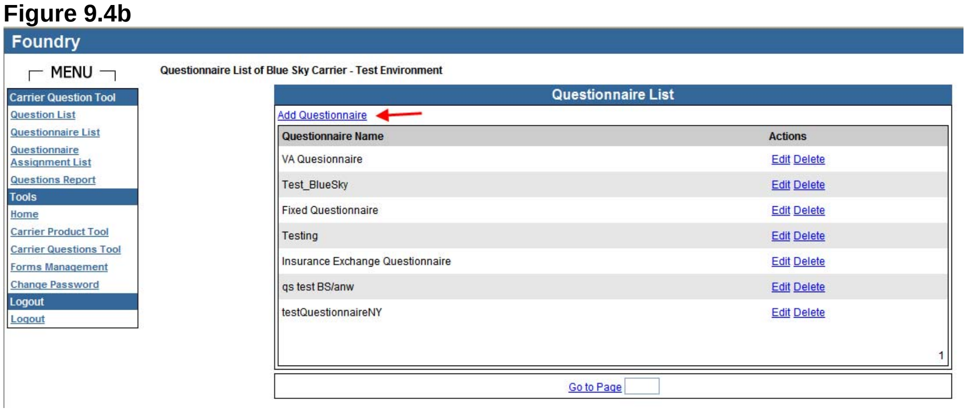
Once the questions have been created, the user may group those questions into separate questionnaires by clicking on the Questionnaire List link from the Foundry Carrier Tool to access the Questionnaire List Page. The user will then be taken to a list of Carrier questionnaires.

Figure 9.4a



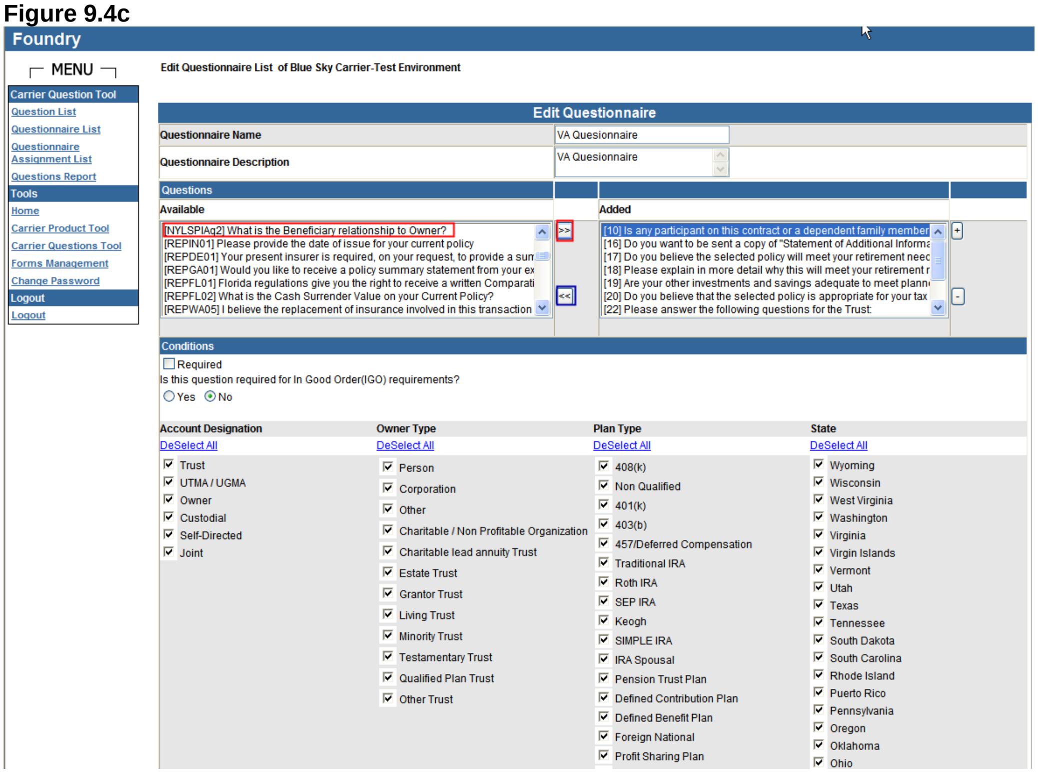
To add a questionnaire to the list, click on the Add new questionnaire link.

Figure 9.4b



By clicking on the Add Questionnaire link, the user will navigate to a screen to complete the Questionnaire. Add the questions by selecting them from the available box and clicking the >> to add. To remove questions, select them from the Added list and click the << to remove.

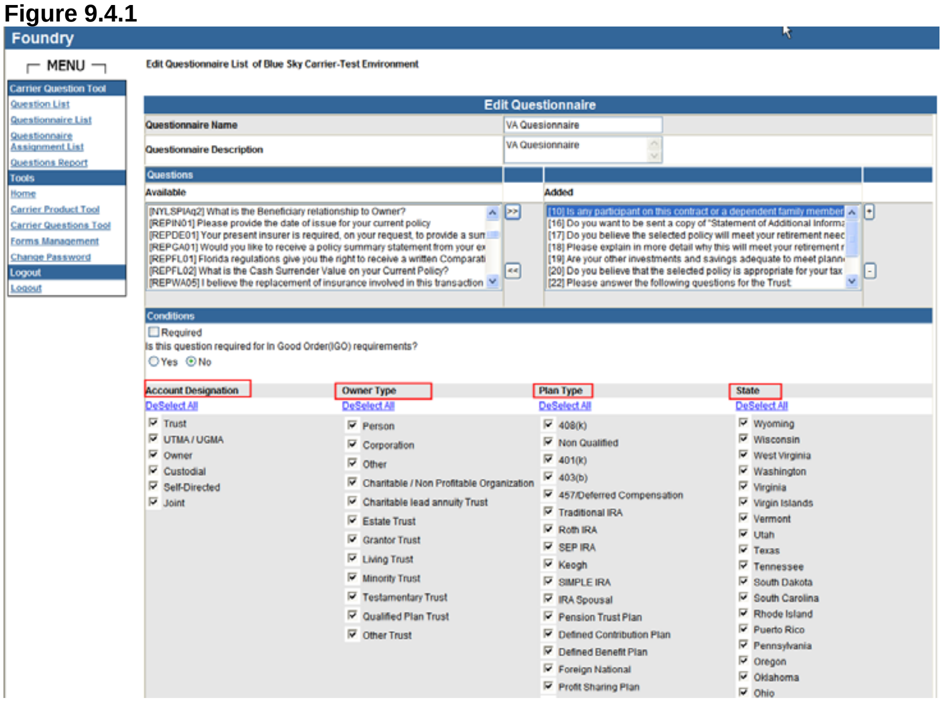
Figure 9.4c



9.4.1 Conditions for Questions:

As questions are added to the questionnaire, conditions can be added to control the appearance rules. Conditions are assignable to each question per Questionnaire. So, before adding conditions, ensure the question is highlighted. Conditions will be multi-select or as described below for CUSIP.

Figure 9.4.1



⇨ **Required:** If required is checked, this question must be answered if activated by a distributor.

⇨ **IGO Requirement:** This is applicable for e-signature and hybrid clients. If a question is an in good order requirement and the client is participating in e-sig and hybrid, the distributor will be forced keep a question activated unless they share their NI for a question that already exists on their platform. *Currently, this only applies to Merrill Lynch.

⇨ **Account Designation:** (only apply to applications)
- Trust
- UTMA / UGMA
- Owner
- Custodial
- Self Directed
- Joint

⇨ **Owner Type:** (only apply to applications)
- Person
- Corporation
- Other
- Trust
- … All trust types are available for restrictions
-

⇨ **Plan Type:**
- 408k
- Non Qualified
- 401K
- 403b

- 457 Deferred Compensation
- Traditional IRA
- Roth IRA
- …. All plan types are available for restrictions

⇨ **State:** add the applicable states where this question should apply. (Select the states that apply.)

⇨ **Cusip:** Cusips can be added in a comma delimited format for multiple cusips to be entered for product specific questions. The existence of a cusip means, the question will only appear for that product.

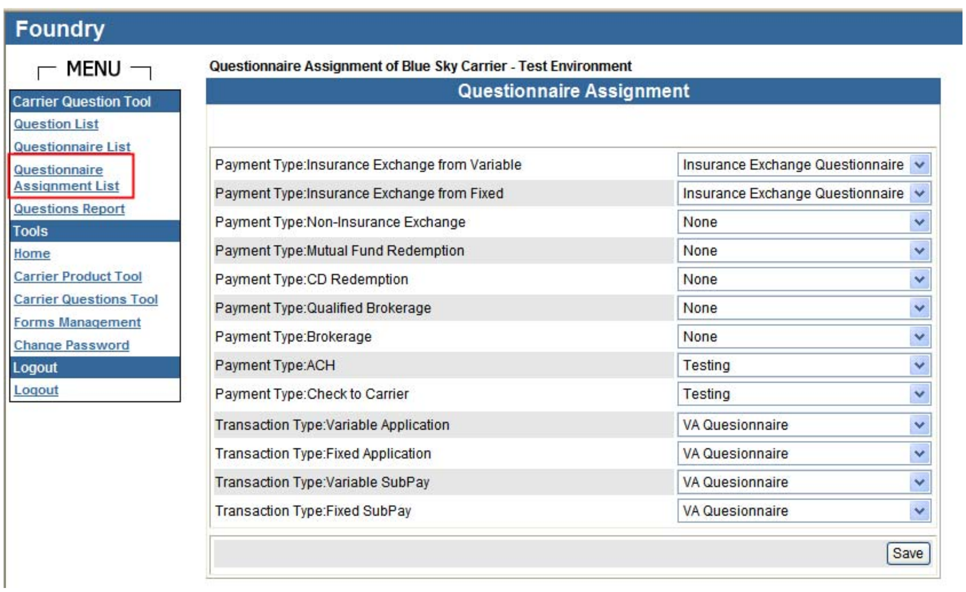
Once all the conditions have been added for each question, click save.

9.5 Questionnaire Assignment

Carriers must assign the questionnaires to the wizard. This process is also a type of appearance rule such that questionnaires assigned to a Payment Type will only appear if that payment is part of the transaction. Likewise, questionnaires assigned to a Transaction Type will only appear if that transaction has the assigned transaction type.

Clicking on the Questionnaire Assignment link will bring the user to the assignment screen.

Figure 9.5a



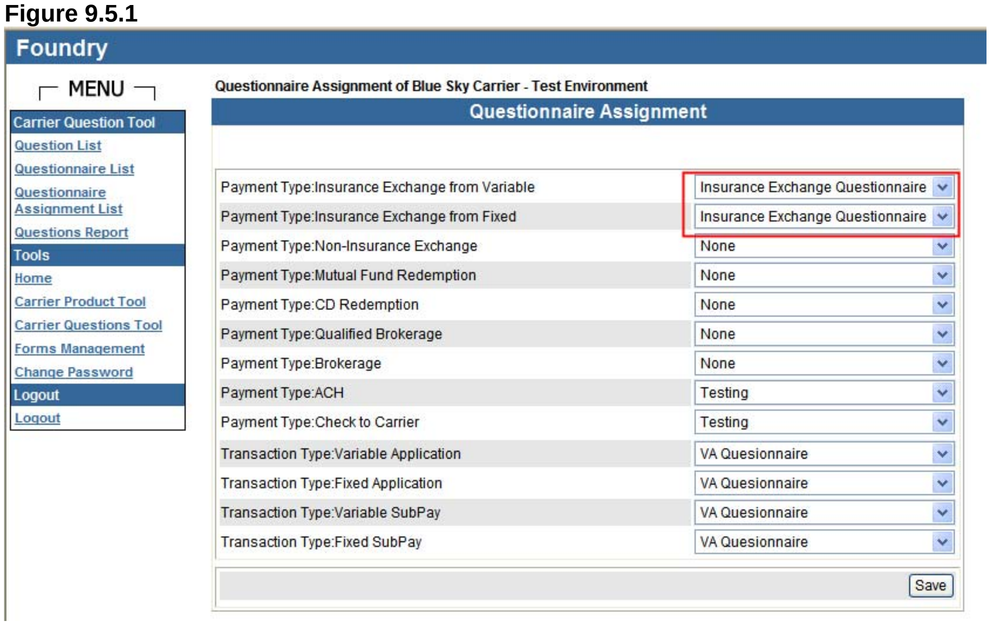
The user will be able to add one questionnaire for each type listed below. Note, there may be different appearance conditions on questions within each questionnaire.

9.5.1 The questionnaire types available are listed below:

⇨ Payment Type: Brokerage Account
⇨ Payment Type: Qualified Brokerage Account
⇨ Payment Type: Check to Carrier
⇨ Payment Type: Check to Distributor
⇨ Payment Type: ACH to Carrier

- ⇨ Payment Type: Mutual Fund Redemption
- ⇨ Payment Type: CD Redemption
- ⇨ Payment Type: Other Non-Insurance Exchange
- ⇨ Payment Type: Insurance Exchange from Fixed*
- ⇨ Payment Type: Insurance Exchange from Variable*
- ⇨ Transaction Type: Variable Application
- ⇨ Transaction Type: Fixed Application
- ⇨ Transaction Type: Variable Subpay*
- ⇨ Transaction Type: Fixed Subpay*

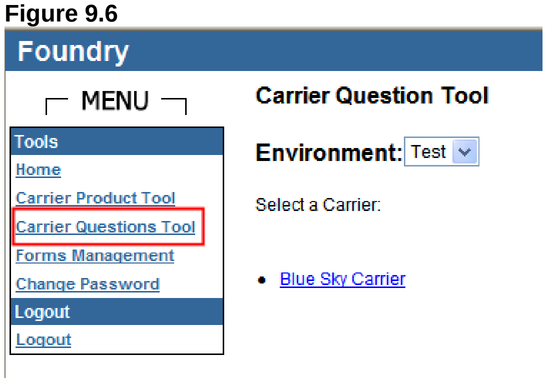
Figure 9.5.1



9.6 Managing Questions in different environments

The Carrier Product Tool in ProdSim Foundry has been updated with an environment drop-down that will only impact the Carrier question links. By selecting the Test environment, carrier clients will be able to manage the ProdSim questions. By selecting the Production environment, carriers will be able to manage the Production questions.

Figure 9.6



9.7 Distributor Change Control

Once the Super User has created the Carrier questionnaires and assigned them to the appropriate questionnaire types, the questionnaires will appear at a BU level on the Firm Management page for Distributors to activate/deactivate questions. The default will be all questions are deactivated. The questions will appear in AnnuityNet only for the distributors that have activated the questions. The activated questions will appear for both app and sub if they apply. Transaction Type questionnaires appear after authorization (within the Carrier wizard). Payment level questions appear after the distributor payment level suitability questions for each payment.

If a distributor question is restricted, a box will appear for the distributor to input the NI for the related question on their wizard, this will be an optional field. Ebix will map the distributor NI to the NI for the Carrier question. That will allow the carriers to tag forms using the carrier page NI.

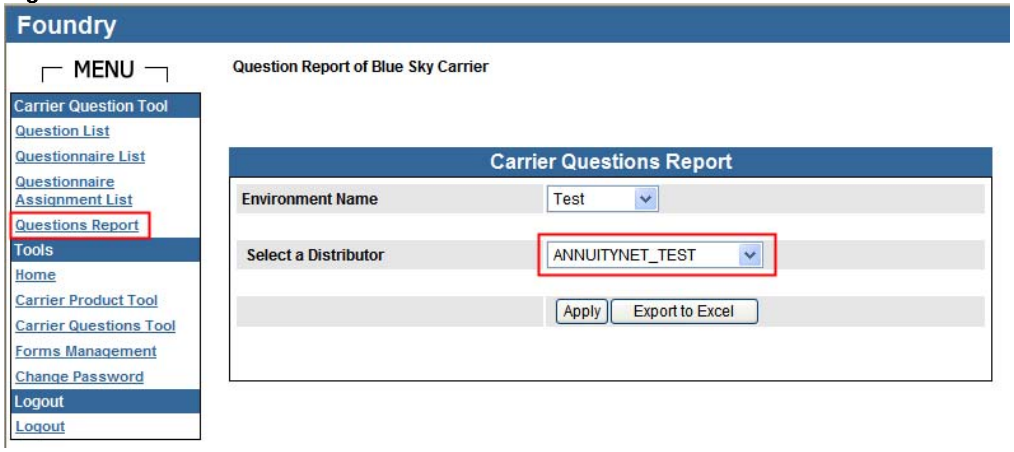
- ⇨ If a distributor is participating in e-signature and hybrid and a question is an in good order requirement, the distributor will be forced keep a question activated unless they share their NI for a question that already exists on their platform. *Currently, this only applies to Merrill Lynch.

9.8 Carrier Question Report

Each carrier will have a Carrier Questions Report that is available via the Questions link. This report will show which questionnaires are activated for the selected distributor, the questions that are active/deactive, the conditions associated with each question, DTCC mapping detail, and the answer options.

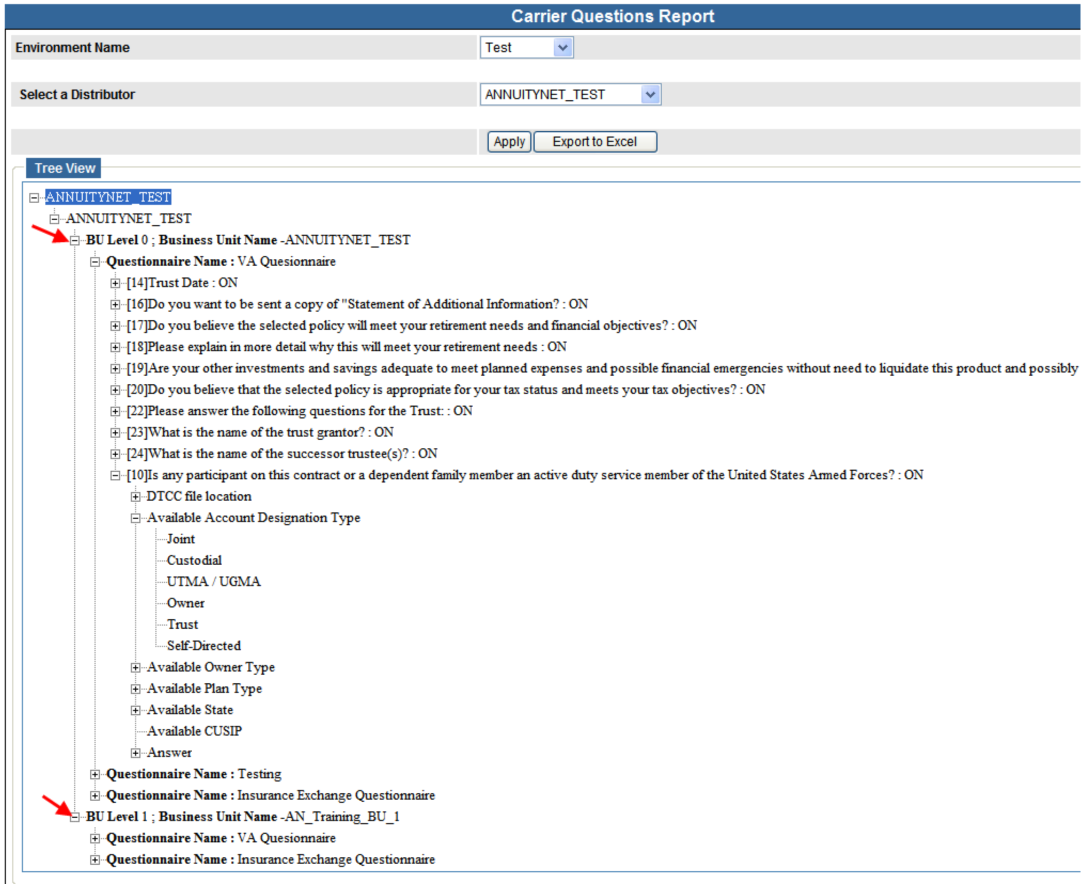
Follow the steps in section 9.1 to get to the report, click on the Questions Report link. By clicking the Questions Report link, a screen will display allowing the user to view the report on the screen or export the report to Excel. Select the distributor for the report and click the desired output.

Figure 9.8a



By clicking Apply, the report will display in a tree view for the distributor selected.

Figure 9.8b



Expanding the + will display the questionnaire details including each of the activated question text, alternate NIs, DTCC mapping details, conditions, and answer options

9.9 Form Population using Carrier Page Questions

The system assigned questionID and AnswerIDs will generate Named Items that can be used to tag the PDF forms. This will enable the forms to pre-populate with those question and answers.

The Nis will be in the format of, Carrier_Question(ID)_ANSWER(IDa) . Below are 2 examples where the question ID = 2305:

- CARRIER_QUESTION(2305)_ANSWER(2305a)_ X
- CARRIER_QUESTION(2305)_ANSWER(2305a)

9.10 Carrier Page Questions Best Practices for Carriers

With the addition of the Carrier Page Tool, it is imperative to address the best practices for carriers requesting activation of questions. In order to ensure that Carrier questions are activated in a timely manner, each Carrier is asked to follow the below procedures for requesting questions directly to distributor clients.

1. In order to ensure all needed or desired questions are activated by a distributor, each carrier will need communicate the details of the questions to the distributor directly. We recommend using the attached spreadsheet and include the Question ID and conditions of each question. It is our recommendation that this is done no less than 3 weeks ahead of the expected date to allow for ample testing time. In the request, please list the question ID and conditions on the questions that are being activated.

CarrierQuestionSign OffSheet.xls

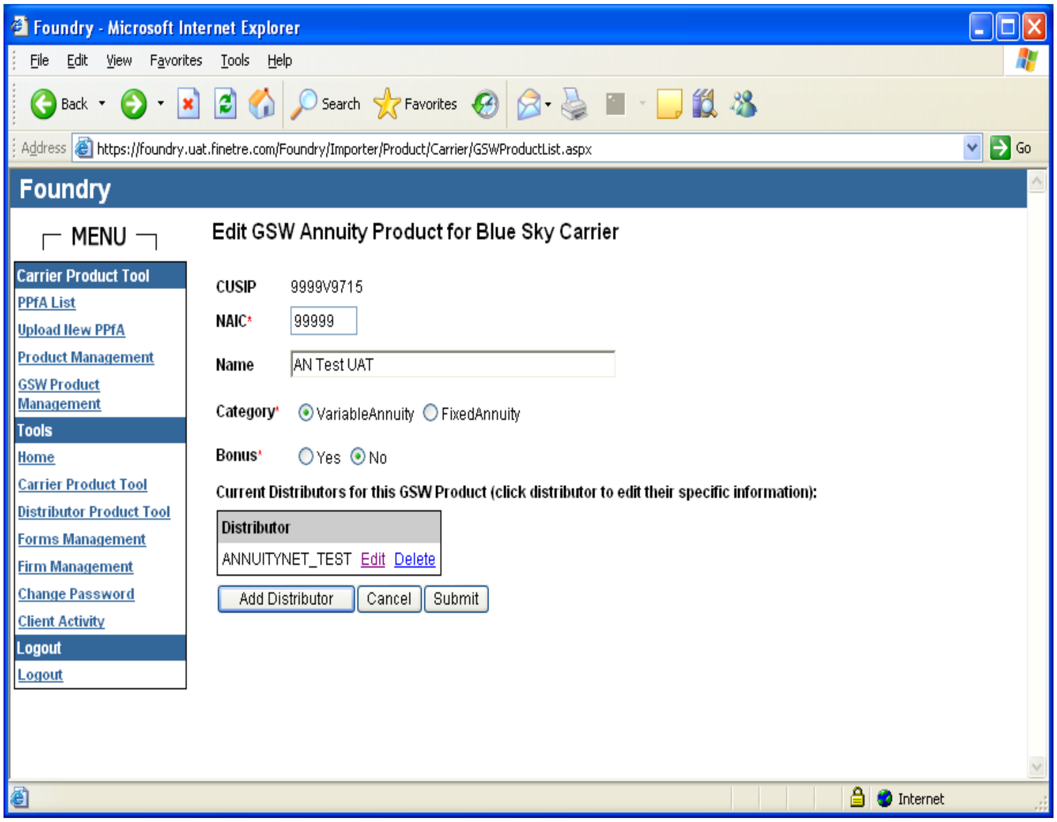
2. The distributor will determine if a similar question already exists for sharing the NIs. If a question already exists, the question will remain deactive but the NIs will be shared to map to the carrier question NIs.
3. If a similar question does not already exist, the distributor will need to activate the question in UAT to test. Testing could take a week or two due to the distributor/s testing availability. Once the distributor has tested and approves of the results, they will notify the carrier.
4. The Carrier can add the question to Production and notify the distributor that the question is available in Production for activation. It is our recommendation that questions are not activated during the business day. The distributor or CIS will activate the question in Foundry Production at the end of the business day for the open of business on the following day.
5. Carriers can utilize the Carrier Questions Report in Foundry to view any questions that are activated for each distributor. Log into Foundry -> Carrier Product Tool -> Carrier Question Report -> select the distributor and hit apply. All reports are exportable to Excel.

10 Maintaining GSW's for Tier 2 Distributors

For distributors using Tier 2, EbixExchange will build GSW's from the PVF file. Carriers should go in to Foundry, GSW Product Management and verify the NAIC code, Distributor, Subpay status, Name of Product, etc. Some of this data was pulled from the PVF (i.e. Product names will appear using the following format *CARRIER_SOURCE_ID CUSIP)* and may need to be revised. Other data may not have been in the PVF and will need to be entered.

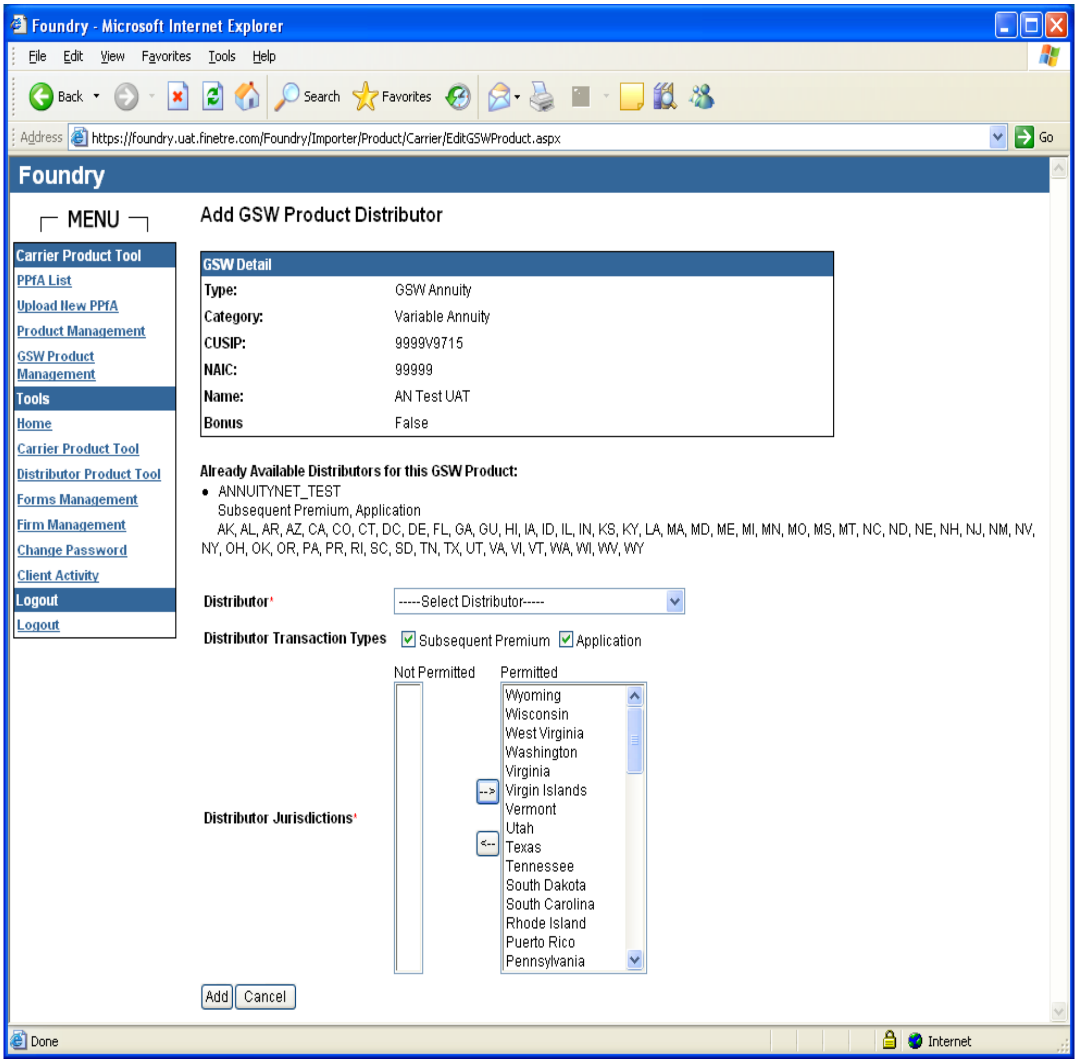
Once the GSW details are accurate, the carrier will need to deploy the PPfA and ask the distributor to turn the product on (if the distributor does not have Foundry access, the EbixExchange PM can do this). The product will not show up until Day 2 after an EbixExchange process has run to pull the GSW into the distributor's site.

Figure 10a – Edit GSW data



To edit the GSW, login to Foundry, go to GSW Product Management, locate the product you are trying to review, and click Edit. You will see the following screen. Please confirm/revise the NAIC code, Product Name, Category and Bonus information. You will need to add the Tier 2 Distributor.

Figure 10b – Add new Distributor to a GSW Product



To add the Tier 2 Distributor, click Add Distributor from the Edit GSW screen. You will need to select a Distributor from the drop down list, choose Subsequent Premium for Transaction Type and verify the permitted jurisdictions. Once complete, click Add. You will be brought back to the Edit GSW screen where you will see the new distributor listed. You must then Submit the PPfA. You will have another chance to verify the data. Click Approve and Upload PPfA.

11 Distributor Delta Best Practices for Carriers

With the addition of the Foundry Delta Restriction Tool, it is imperative to address the best practices for carriers requesting restrictions. There are many factors to account for when adding restrictions. In order to ensure that Carrier restrictions are added in time for the effective change, each Carrier is asked to follow the below procedures for requesting restrictions.

1. The Carrier will need to submit the request to add a restriction no less than 3 weeks ahead of the expected date. A rush in the restriction can only occur if coordinated with CIS and the distributor for their testing availability.
2. In order to ensure all restrictions are added correctly for each distributor, CIS will need to communicate with each B/D that the restriction will impact. CIS will confirm the restriction is a cross product or product specific restriction. NOTE: This could take a few days. To expedite this process, the Carrier can confirm this with the distributor/s directly.
3. CIS will notify the carrier that the restriction is confirmed. If changes will occur in the PPfA, the Carrier can now load it in UAT or ProdSim. (Please coordinate with CIS and your Distributor partners as to which environment you are loading / testing.)
4. Once the PPfA is loaded, CIS will add the restriction in the appropriate test environment(s).
5. CIS will notify the distributor/s to test the restriction. This could take a week or two due to the distributor/s testing availability. Once the distributor/s sign-off on the testing, the product can move to production.
6. CIS notifies the Carrier that the distributor has signed off on the testing, at which time the Carrier can stage the PPfA to deploy to Production for a specific date (probably on a Friday night). On the following day, CIS will add the restriction to Foundry for the open of business on the following Monday. If a mid-week release schedule is desired, the distributor must agree to the mid-week product change.
7. Carriers can utilize the Carrier Product Restrictions Report in Foundry to view any restrictions that are in place that impact their products. Log into Foundry->Carrier Product Tool->Product Restriction Report->Select the Jurisdiction or Delta Restriction report. All reports are exportable to Excel.

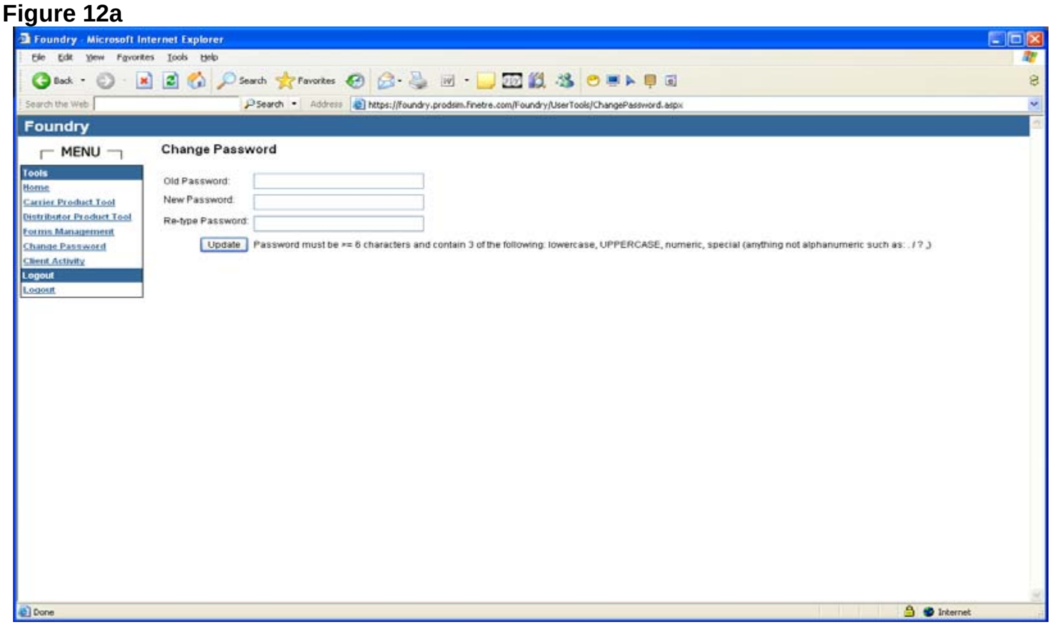
Carriers should note that if they currently submitted a request to have a restriction put in place across ALL products for a particular distributor this restriction MUST be communicated to CIS when the Carrier sends the sign off sheet to activate a new product (See your CIS project manager or CommPort for an updated Sign Off sheet).

For example, a Carrier has previously indicated that all of their products for distributor X should have a restriction in place to not allow Roth IRAs under Custodial accounts, The Carrier later launches a new product for distributor X. At the time the Carrier requests that product to be activated in Test or in Production for distributor X, the Carrier must indicate that a restriction should be added to this product to restrict Roth IRAs under Custodial accounts for distributor X.

12 Password

You may change the password used to log in to Foundry. To do so, you must click on the link Change Password in the Menu. The link will take you to the Change Password page. You must type in your old password in the box next to Old Password. You must type in your new password in the remaining two boxes and then click Update. The new password takes affect when you click on Update. See Figure 10.0.1.

Figure 12a



13 Log Out

To log out of Foundry, you should click on the link Logout in the Menu. To close the window, you may either click on the X in the upper right-hand corner of your web browser or select File→ Close from the browser's parent menu.

14 E-mail Notifications

Foundry generates e-mails based on various upload and deployment events. The e-mails inform the recipient as to the status of a PPfA or Forms XML. Your firm should provide your EbixExchange project manager with the e-mail address of the person who should receive these notifications. If e-mail notifications should go to more than one person, a distribution e-mail list should be created by the firm. This e-mail address should be provided to the EbixExchange project manager.

Listed below are the triggers for e-mail notification and the content of those e-mails.

Trigger	Subject Line	Text
A PPfA has been imported successfully and is staged to be deployed to ProdSim/UAT.	Carrier Name; Import ID; CUSIP; Product Name, PRODSIM or UAT SUCCESS	Carrier Name; Import ID; CUSIP; Product Name The PPfA has been successfully imported and is in queue to be deployed to PSIM or UAT. You will receive an email when the PPfA has been successfully deployed to PSIM or UAT.
A PPfA has been deployed and mapped successfully.	SUCCESS: PSIM/UAT/PRODUCTION - Carrier Name; Import ID; CUSIP; Product Name; PSIM/UAT/PRODUCTION	SUCCESS: PSIM/UAT/PRODUCTION - Carrier Name; Import ID; CUSIP; Product Name The PPfA has been successfully deployed and is now available in PSIM/UAT/PRODUCTION.
A PPfA has failed batch processing.	Carrier Name; Import ID; CUSIP; Product Name; PSIM or UAT FAILURE *This e-mail is for those times when there are true PPfA errors discovered when importing the PPfA. The e-mail should include the error messages generated by Foundry.*	Carrier Name; Import ID; CUSIP; Product Name The PPfA failed due to the errors noted below: *Error 1* *Error 2, etc.*

A PPfA has failed batch processing.	Carrier Name; Import ID; CUSIP; Product Name; PSIM or UAT FAILURE *This e-mail is for those times when there is a product XML conversion error generated by Foundry during the post-import processing required to use the PPfA with the AnnuityNet Baseline Wizard.*	Carrier Name; Import ID; CUSIP; Product Name The PPfA failed to import. Please contact the EbixExchange Project Manager to open a carrier assistance VI.
A PPfA has failed deployment.	FAILURE: PSIM or UAT – Carrier Name; Import ID; CUSIP; Product Name; PSIM or UAT	The PPfA failed deployment to PSIM or UAT. Please contact your EbixExchange Project Manager.
A PPfA has failed mapping to a distributor.	Mapping: Carrier Name; Import ID; CUSIP; Product Name	Mapping: Carrier Name; Import ID; CUSIP; Product Name Product mapping to MERRILL_LYNCH failed deployment to PSIM or UAT.
Forms successfully deployed.	SUCCESS: PSIM or UAT /Production - Carrier Name; Import ID; Forms; [PSIM or UAT /Production]	SUCCESS: PSIM or UAT /Production - Carrier Name; Import ID; Forms Forms have been successfully deployed to [PSIM or UAT /Production].
Forms failed deployment.	FAILURE: PSIM or UAT /Production – Client CARRIER/DIST; Forms; PSIM or UAT /Production	FAILURE: PSIM or UAT /Production – Client CARRIER/DIST; Forms The forms failed deployment to [PSIM or UAT /Production]. Please contact your EbixExchange Project Manager.

15 Frequently Asked Questions

General Foundry Questions
Staging Metadata/Sign Off Sheets/Production Pushes
Emails
PPfA
Product Availability
PDF/Forms XML

General Foundry Questions

When is Foundry available?
Foundry is available 24 hours a day/7 days a week.

When are patches/upgrades done to Foundry?
Foundry will begin to follow the regularly scheduled release cycles. There may also be incremental service releases and patches deployed on an as-needed basis. We will make best efforts to give clients 48 hours notice prior to scheduling such a release. These releases will be done either before or after market hours depending upon the nature of the upgrade.

Who should I contact if I have issues with Foundry? How soon will bugs be fixed?
Please submit incident reports/questions to your PM for UAT issues and to Production Support for ProdSim/Production issues. They will provide an ETA on the fix once the issue has been researched.

How do I submit requests for Foundry improvements?
Follow the same process you use for change requests to the AnnuityNet system. Submit a change request to your PM to be considered for a platform enhancement

Is there training offered for Foundry?
Training can be done through an online training session or by one-on-one training with your PM.

How can I change the recipient for the e-mails Foundry sends out, change passwords, add new users, etc.?
Contact your EbixExchange Project Manager to change the emails or add/delete users. You may change the password by following the instructions in Section 10. When requesting User IDs, they must be 5-12 characters.

I noticed that the tracking numbers are not consecutive – is anything wrong?
It is normal for the tracking numbers to be non-consecutive. Foundry can be accessed by multiple users at the same time, and it is probable that many users are doing the same action; therefore, the tracking numbers may or may not be consecutive.

How long will my PPfA's and Forms XML remain in Foundry?
We archive Foundry every night. The PPfA/Forms XML will be archived if it is 15 days old and 3 versions prior to a deployed version. Any deployed/staged PPfA's/Forms XML will not be archived.

I don't understand the error messages from Foundry. How can I find out more?
Submit the message along with a copy of your PPfA or Forms XML to your EbixExchange Project Manager.

<u>Staging Metadata/Sign Off Sheets/Production Pushes</u>

Do I still need to submit my sign off sheet each week and if so, when?
You only need to submit your sign off sheet if you are turning on products for Distributors for the first time. The sign off sheet needs to be to your PM by 9am EST on the day you intend to push them to Production. You will still have until 12pm EST to stage the metadata but this gives the PM some notice that products will need to be turned on because we must also have this done before the push.

When do I need to mark things over to be included in a Production push?
Metadata may be scheduled for Production between 5pm EST on Day 1 and 12pm EST on Day 2 to be included in the push to Production at 5pm on Day 2.

When do the Daily Production pushes occur?
The Daily Production push will start at 5:30pm EST Monday through Friday (except for blackout days noted on Release calendar). The products will be available on the morning of the next day.

How do I know which products I already marked over to go to Production?
Check for the status "*Scheduled for Deployment*" in the PPfA List under Carrier Product tool.

I made a mistake. I don't want this product to go to production, but I clicked on Stage Product for Production Environment. What can I do?
Log into Foundry and click on the Carrier Product Tool. Click on View/Manage for the PPfA you want to unstage. Then click on Unstage Product for the Production environment in the Product Detail screen.

<u>Emails</u>

Who do I contact with questions regarding emails I receive from Foundry?
Send any questions regarding error messages or emails to your PM and include the PPfA or Forms XML in question.

If I make a distributor-specific change, will all distributors receive emails about the change?
No. You will need to notify distributors of any product changes.

<u>PPfA</u>

Why am I receiving errors on a PPfA that previously loaded without errors?
It is possible that an enhancement to Foundry included new validation rules that are now becoming apparent when you reload the PPfA. These errors may not have been displayed earlier, but there were probably issues with the product for which you were unaware.

What do I do if I load the wrong version of a PPfA?
If you realize you loaded the wrong version of a PPfA, you can just load the correct version and it will override the incorrect version. However, note that if you remove a distributor from the PPfA and add it back in at a later time you will have to go to the distributor product tool and turn the product on for this distributor again.

What does it mean when a PPfA is reprocessed?
There are occasions when a bug is found in the system and after it has been corrected. The PPfA's need to be reloaded. If that is needed, you will be notified prior to the reprocessing. You should then refrain from loading any products until you receive the email notification that the metadata we reprocessed has been successfully imported and is in queue to be deployed.

How can I review the PPfA XML of a previously uploaded file?
Log into Foundry and click on the Carrier Product tool. Click on View/Manage for the PPfA you are interested in seeing. Click on PPfA XML in the product detail screen. This will let you save the XML to your hard drive.

Product Availability

My product is not showing in the wizard. What should I do?
Log into Foundry, click on the Carrier Product Tool and check if the PPfA's status is Deployed. If the status is Deployed and the product is not showing in your carrier test site, use the Distributor Product Tool and make sure the product is turned ON for your test site. If the product is not showing up on a distributor's site, contact your EbixExchange Project Manager.

If the status of the PPfA is Batch Incomplete, this means errors occurred when the PPfA was processed. You should have received an email detailing the errors. If you did not, please contact your EbixExchange Project Manager.

If your product is still not showing in the wizard after you've done all the steps above, check the name of the product – PlanName and ShortName in the XML. Product names need to be distinct for each product you submit, even if the CUSIPS are different.

Another item to check is the state availability for the product. Is the product available for the state selected in the wizard? You can check the state availability using the Carrier Product tool. Click on view/manage for the product's PPfA that is deployed.

How can I see a list of all of my products and whether they are turned ON or OFF?
Log into Foundry, click on the Distributor Product Tool and select your appropriate Test Distributor i.e. CARRIER_NSCC. You will see a list of products turned on in ProdSim/UAT. Look under the Active Status column to determine whether it is OFF or ON. When you click on the product name you can see for which distributors the product is turned on or off. You can change the filter to see Production as well.

How long will it take until my product appears in the wizard after I upload it?
Deployments to ProdSim/UAT occur daily beginning at Midnight and thereafter, continue every 90 minutes. Any products that have completed the batch process will be deployed at that time. The length of the deployment depends on how much metadata is included in that deployment.

A product I just uploaded is not available to be turned on – what's wrong?
You must wait until the product makes it through the batch queue. If the status of the product shows Batch Complete, you should be able to turn it on. If the status shows Batch Started or Batch, wait until you see Batch Complete to look for the product again. If you see Batch Incomplete, you need to check your email for the detailed error messages.

PDF/Forms XML

My PDFs are not showing up in the wizard.
Check to make sure you deployed a Forms XML when you uploaded your most recent PDFs. Forms XML must be deployed each time you load new PDF's. You may deploy an earlier version or load a new version. See Sections 5 and 6 on how to upload PDFs and Forms XML.

I have 50 PDFs I'd like to upload – do I have to upload them individually?
You can put them into a zip file and upload the single zip file. Do not include the XML in this zip file, and do not use subdirectories within the zip file. After uploading the zip file you must upload a Forms XML and deploy it to ProdSim/UAT to make the PDFs available or redeploy a previously uploaded version.

Uploading a zip file doesn't work – what can I do?
Make sure the zip file isn't too large – it should not be larger than 15 Mbytes. Also, zip files should not contain subdirectories.

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