

Creating a Feature Transaction

Procedures to create a feature transaction:

These procedures show how to create feature transactions. If you are a WIN client, it is very important to always follow the WIN Best Practices Guide. Refer to that document if you have any questions.

Creating a Feature Transaction

1. Click on 'Features' from the left navigation path.



2. In the Available Feature Transaction section, click on [\[Add\]](#).

Available Feature Transactions

	Carrier Facing Description (3)	Feature Transaction Description	Modified On	
[Del] [Clone]	Fund Transfer	Fund Transfer, Transfer	11/23/2010 2:05:28 PM	[View]
[Del] [Clone]	New Business Submission for a Policy	New Business Submission, Initial Premium	11/23/2010 2:05:28 PM	[View]
[Del] [Clone]	Payment Transaction	Payment Transaction, Subsequent Premiums	11/14/2007 12:24:48 PM	[View]
				[Add]

1. Add the Feature Transaction that is appropriate for the feature.
 - For Features available for new sales, add New Business.
 - For those available for additional premium transactions, add Payment Transaction.
 - Finally, for those available during the Fund Transfer process, add Fund Transfer

Once the appropriate Feature Transaction is decided on, complete the following steps:

2. Enter the Carrier Facing Description
3. Enter the Description
4. Choose the Transaction Type:
 - New Business Submission (103)
 - Payment Transaction (508)
 - Fund Transfer (102)
5. Choose the Arrangement Type:
 - Initial Premium (19)
 - Subsequent Premiums (39)
 - Transfer (1)
6. Associate Products by clicking on the list of products provided in the Policy Product box.
7. Available Feature Information - choose the features that are to be available under that particular feature transaction.

Field Definitions

Carrier Facing Description

Description

Transaction Type

Transaction Sub Type

Arrangement Type

Transaction Available Date (yyyy-mm-dd)

Transaction End Date (yyyy-mm-dd)

Issue Effective Date (yyyy-mm-dd)

Issue Expiration Date (yyyy-mm-dd)

Policy Products

Show Selected Select All+ Select None - (0)

VTINDEX - VERTEX Equity Indexed Annuity

VTXVA2.20 - VERTEX Fixed Deferred Annuity

VTXSPIA - VERTEX Fixed Immediate Annuity

VTXVA - VERTEX Variable Deferred Annuity V2

Available Feature Information

Feature	Product	Info	Description	Modified On
[Add]				

Policy Status

Show Selected Select All+ Select None - (0)

Active (inforce) (1)

Active - Preliminary Term (48)

Active Rider Terminated - Policy Converted to NFO (non forfeiture options) (90)

Annuitized (36)

List of Jurisdiction Approvals

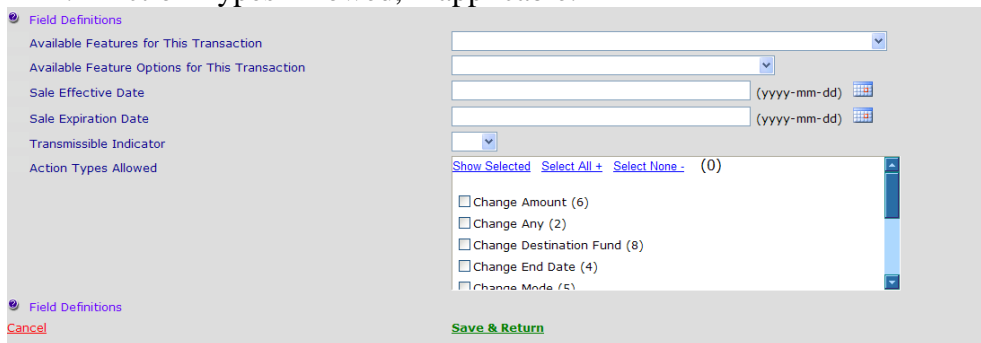
Name	Sale Eff	Sale Exp	Infrc Excl Cal	Infrc Excl Con	No New Money	Modified On
[Add]						

Field Definitions

7a. Click [Add] in ‘Available Feature Information’ section:

Steps on how to associate a feature(s) that is available to a ‘Feature Transaction’.

- a. In ‘Available Features for This Transaction’, select the appropriate feature from the drop down list provided
- b. Available Feature Options for This Transaction
- c. Sale Effective Date, if applicable.
- d. Sale Expiration Date, if applicable.
- e. Transmissible Indicator, if applicable.
- f. Action Types Allowed, if applicable.

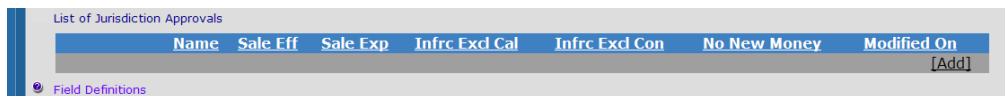


g. Click Save & Return

8. Policy Status – click on appropriate box, if applicable.

9. Associate the Jurisdiction(s) available to the Feature Transaction:

9a. Click [Add] in the ‘List of Jurisdiction Approvals’ section:



Steps on how to associate a jurisdiction(s) on a ‘Feature Transaction’.

- a. Select the state in the ‘Jurisdiction’ drop down list.
- b. New Business Calendar Effective Date, if applicable.
- c. New Business Calendar Expiration Date, if applicable.
- d. In-Force Calendar Expiration Date, if applicable.
- e. In-Force Contract Expiration Date, if applicable.
- f. No New Money Date, if applicable.
- g. Contract Issue State can be Different? - if applicable.
- h. Click Save & Return

Jurisdiction Approval

Jurisdiction	<input type="text"/>
New Business Calendar Effective Date	<input type="text"/> (yyyy-mm-dd)
New Business Calendar Expiration Date	<input type="text"/> (yyyy-mm-dd)
In-Force Calendar Expiration Date	<input type="text"/> (yyyy-mm-dd)
In-Force Contract Expiration Date	<input type="text"/> (yyyy-mm-dd)
No New Money Date	<input type="text"/> (yyyy-mm-dd)
Filed Form Number	<input type="text"/>
Contract Issue State can be Different?	<input type="text"/>

Field Definitions

[Cancel](#) [Save & Return](#)