

# VTXml Enhancements January 2012

We will be introducing a couple of new enhancements to VTXml.

VTXml Reporting Services will be updated to include a couple of new reports: a report with a full List of Fund Managers with associated funds and also a report with All Distributors and their Product Associations. Here are the currently available Reports:

The screenshot displays the VTXml Annuity Suite interface. At the top, the logo for VTXML Annuity Suite is visible, along with the text "Training Region" and "VERTEX INCORPORATED". Below the logo, there are navigation icons for Administration Tools, Product Profiles, WIN, Line Of Business, and Logoff. A central banner reads "Annuity Report Selection". On the right side, there is a legend with colored circles and text: WIN Changes (purple), Milt WIN Changes (blue), Current WIN Added (green), Different WIN Added (yellow), Current WIN Deleted (red), Milt WIN Deleted (orange), Different WIN Deleted & Has Changes (pink), and Different WIN Deleted (grey).

The main content area is titled "Reports" and contains a dropdown menu labeled "Select a Report". The dropdown menu is open, showing the following options:

- PLEASE SELECT A REPORT
- PLEASE SELECT A REPORT
- ALL Feature and FeatureOption Conflicts and Requisites
- ALL Features and FeatureOptions
- ALL Fund Managers with Associated Funds
- PolicyProduct WIN Relation
- PolicyProduct(s) by ALL Distributors
- PolicyProduct(s) by Single Distributors

The interface also includes a left-hand navigation menu with various options such as "View Build History", "Output PPIA", "Output DPIA", "Change your information", "User Information", "Group Information", "Carriers / Writing Co.", "Import Rates", "Import Messages", "Intended Receiver Config", "Activity Log", "Admin Activity Log", "Transport / Report Config", "Support Tools", "Carriers / Writing Co.", "Distributor Config", "Reports", and "User Guide".

# Underwriting Guidelines:

The beginnings of Underwriting Guidelines (for Life only) which will allow Carriers to define Height/Weight Build Charts and also Age/Face Requirements Chart via XTbML.

Annuity will not use this functionality at all. For Life only, a new left navigation button called Underwriting Guidelines will be added to the bottom of the Left Nav.

**Carrier:** VERTEX - Test '9850 - test 12/31/2012, (Gary Parent)'

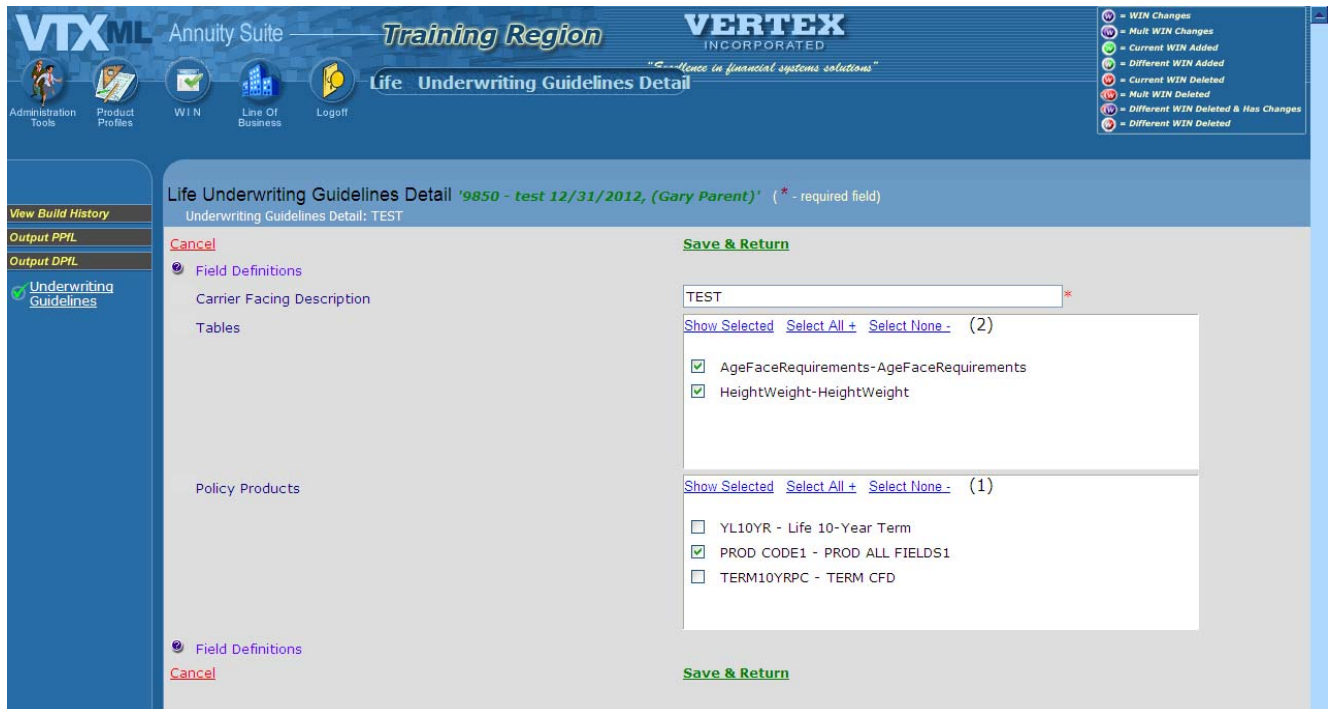
		Carrier Facing Description (3)	Product Code	Product Type	Modified On	Count	
[Del]	[Clone]	<a href="#">Life 10-Year Term</a>	YL10YR	Term	1/6/2012 9:08:01 AM	2	<a href="#">[View]</a>
[Del]	[Clone]	<a href="#">PROD_ALL_FIELDS1</a>	PROD CODE1	Term	2/2/2011 1:49:06 PM	2	<a href="#">[View]</a>
[Del]	[Clone]	<a href="#">TERM_CFD</a>	TERM10YRPC	Term	9/30/2010 10:57:23 AM	2	<a href="#">[View]</a>

Term

Within the Left Nav a popup will be added allowing guidelines to be defined.



Each Guideline can point to multiple Tables which can be used to define Age/Face Requirements and Height/Weight Build charts. Each Guideline can also point to multiple Products but a Product can only be associated to a single Guideline. VTXml will remove any products from the list if they are referenced by another Guideline.



To support the complex modeling needed to define the Guidelines, The Table Definition and Table Values screens have been updated. Complex Content Descriptor has been added to the Table Definition Screen. This new popup is used to allow a Table to have multiple Y values in XTbML. For example, in an Age Face Requirement chart, the ability to specify that by a certain Age and a certain Face Amount the following Underwriting requirements need to be satisfied (Attending Physicians Statement, Motor Vehicle Report, EKG, etc...). Content Complex Descriptor allows the definition of what the values could be.

Complex Content Descriptor

Content Code (4)	Sequence	Content Code Type	LookUp Value	Modified On
[Del] Blood		Requirement Code	498	1/5/2012 1:36:58 PM
[Del] HOS		Requirement Code	499	1/5/2012 1:45:56 PM
[Del] EKG		Requirement Code	13	1/5/2012 1:46:36 PM
[Del] APS	1	Requirement Code	11	1/5/2012 1:34:39 PM

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

The Table Values screen is where the requirements to the Key or Axis Definitions are associated. The requirements can be added or deleted as needed. The Values in the dropdown come directly from the Complex Content Descriptor.

Carrier: VERTEX - Test '9850 - test 12/31/2012, (Gary Parent)'

Submit  Cancel

AgeFaceRequirements - AgeFaceRequirements: Count(63)

Age	Face Amount	Requirement	[Add]	[Del]
16	0	Analyze Urine Specimen (HOS)	[Add]	[Del]
16	0	Attending Physician Statement (APS)	[Add]	[Del]
16	0	Analyze Blood Sample	[Add]	[Del]
16	0	Perform EKG / ECG - Resting	[Add]	[Del]
16	50000	Attending Physician Statement (APS)	[Add]	[Del]
16	50000	Analyze Blood Sample	[Add]	[Del]
16	100000	Analyze Urine Specimen (HOS)	[Add]	[Del]

Underwriting Guidelines are currently only available for ACORD Life versions 2.24 and up.