

May 20, 2013 VTXml Release Notes

This release has added additional functionality to the Distributor Configuration page and also the Tax Withholding page in support of AMP.

1) Distributor Configuration has added three new fields.

Under the Ownership Exclusions label two new fields have been added. Allow Exceptions To Min Premium and Allow Exceptions To Max Premium indicators will now allow a user to specify if a Distributor does or does not allow exceptions to premiums. These new fields exist at both the main level - which will apply to all Policy Products the Distributor sells - and at the Product specific level - for the exception products. The values specified will override the existing Policy Products values.

Ownership Exclusions	
Allow Exceptions To Min Premium Ind	No
Allow Exceptions To Max Premium Ind	No

Additionally, a new section has been added called Authorization Exclusions which will allow a user to specify if a Distributor does not allow certain Authorizations.

Authorization Exclusions

[Edit Authorization Exclusions](#) - There are no Authorization Exclusions

For example if a Distributor does not allow Electronic Authorization then the user would check Electronic within the Business Method Exclusions checklist. If this action leaves the Authorization Business Method aggregate without any values in the output then the entire Authorization will be stripped.

Authorization Exclusions

Business Method Exclusions

Transaction Exclusions

Field Definitions

Show Selected Select All+ Select None - (0)

- All methods permitted by the Company (13)
- AppLater (11)
- Document can be recovered from data present (5)
- Document is associated with but not part of the OLIFE data stream (7)
- Document is attached in an Attachment object (8)

Show Selected Select All+ Select None - (0)

- Any Authorized or Supported Transaction (9999)
- Appointment Request (Life use) (410)
- Arrangement Administration (107)
- Form Instance Update (e-sign) (510)
- Fund Transfer (107)

2) Adding WithholdSameStateAsFederalInd to TaxWithholdingProduct

Under Tax Withholding Product, Are State and Federal the Same Withholding Type? is being added to support AMP processing. This will be passed as an extension – **WithholdSameStateAsFederalInd** - for Ebix 2.22 only as this new property is not even in the ACORD standard yet. Ebix will be writing an MR to submit for ACORD version 2.30. Carrier Facing Description is also being added to help differentiate between the other withholding rules. This field will be defaulted to *Please Update Carrier Facing Description*. Carriers should update this field to be useful. This will be passed as a comment in the xml and is used only as human readable text – not for processing.

Annuity Tax Withholding Product *"12298 - Best Practices 8/16/2013, (Ellen Lester)"* (* - required field)

Home > Withholdings > Withholding Products > Search > Update Product (1) / Tax Withholding Product: "Please Update Carrier Facing Description"

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

Field Definitions

Carrier Facing Description: "Please Update Carrier Facing Description" *

Place Where Tax Withholding Is Collected: Federal or national tax (1) *

Is State Withholding Required When Federal Is Gathered?: No

Are State and Federal the Same Withholding Type?: Yes

Should Tax Withholding Be Collected?: Data collection optional (1) *

List of Jurisdiction Approvals

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

List of Amount Products

CFD (1)	Transfer Amount Type	Min Amt	Max Amt	Min Pct	Max Pct	Modified On
[Del] [Clone] Percent	Percentage					5/15/2013 9:03:36 AM
[Add]						