

Oracle Insurance General Agent Release Notes

Release # 8.1

April 2009

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The purpose of this document is to describe the new features and resolved issues offered in the Oracle Insurance General Agent (OIGA) Release 8.1.

NEW FEATURES

New Features introduced for this release:

New Features	Description
Bonus Reconciliation	This feature will allow users create bonus schedules, display the expected bonuses on cases and reconcile bonuses on modal premiums. Reports\Batch Summary\BatchSum.rpt ver 8.1.0.0.1, Reports\Commission Production Reports\CommProd.rpt ver 8.1.0.0.1 and Reports\Production Detail Analysis Reports\ProdE.rpt ver. 8.1.0.0.1 have been updated to support Bonus Commissions.
WebGA Installer	WebGA has an installer available. Please see the OIGA Installation & Upgrade Guide for instructions.

ISSUE RESOLUTION

Issues resolved in this release:

CR Number	Description
16512 / 16521	The Help files are now located in the OIGA installer. The help links in OIGA now point to local help html files.
16513	A blank database is now included in the OIGA installer. This will help new customers with installation and setup.
14330	A customer reported that when they added a new client to the insured screen in coverages, it did not appear to work for cases with a Group Client. Now when you add a new client, it will appear in the drop-down list for insureds.
16415	Customer reported a problem with a duplicate policy showing up when they used the "Find" feature in adding a transaction to a batch. This issue has been resolved.
16324	Issue reported by customer, the "Modify Assignment of Commissions" activity has a display problem. It only shows the end date in the drop-down instead of the Insko name. This issue has been resolved.
16249	Customer reported that the agent payable is not matching the amount showing in the GA payer. This issue has been corrected.
13639	"Available for Application Upload" now triggers the dialog of minimum required elements.
16424	26 payments per year for By-Weekly Payment Mode is now available.
16422	Activity Notes data is being displayed correctly for clients.
14948	The OIGA Ordering History screen under Description correctly displays text related to a service provider's reported status change even when the service provider has given their status change information in a field other than their Provider Event Code.
14873	In the GA General Activity wizard, the bug that occurred when the SUBJECT line was left blank, more than 255 characters were entered into the notes section of the form and the user clicked "Finish" has been fixed.
16458	An app upload will fail if an inactive contract has no agent number. Inactive contracts will be ignored.
14589	If Premium Components Sorting is not selected, the Prod report will go ahead and run.
13446	If an App Upload fails, the next submission will now allow an upload case.
16312	The check box has been removed from the Update Plan Mapping screen.
16462	On the Agency (Corporation) / Agreement tab - the Other Compensations the grid displays the Com Sched now.
16481	The Window 'Agent Hierarchy' on Agent/Agreements/Hierarchies tab correctly displays the data when the Hierarchy tree is less than 3 levels.
16510	Copy Insko functionality with New PA Grid now can create a new company.

CR Number	Description
16223	On the Plan level in the Application Definition tab, the Data Element, Name Field Type and Form are no longer blank for some controls. Users can navigate from the Application Definition tab.
16520	The What to Copy button on copy plans is working as expected.
15907 / 14666	The penny rounding issue in Commission Accounting has been corrected.
16527	An issue with posted payables in the case where the policy number was changed has been fixed.
14619	Users are now able to email a letter to a second business address.
14511	Adding New Agents in Formal Application in the Agents screen was causing OIGA to crash if the SA the agent entity was set up to have minimum code(s) and in the Auditing Setup dialog, the "Force Entity Updates audit activity" was unchecked. This issue is corrected.
14189	In SA, "Attachments" Entity to the Group Permissions has been added.
13531	PDUS no longer fails if INSCO doesn't have any plan information.
16308	The Pending and Commission has been split into tabs on the OIDX Data screen.
16416	Security has been added to the OIDX Data screen. The ability to disable the Pending or Commission view is now in available.
16497	The Finish button is no longer available on the SO attachment screen.
16494	The correct insured in the Service Order screen in OIGA for cases with multiple insureds is now displayed.
16469	A service order will fail if the case has bad premium information.
16400	A failed Service Order will not stop the rest of the orders from being sent to OIDX.
16505	The Service Order Web service now sends the correct case id on cases with multiple insureds where the SO has been requested on the secondary insured.
16087	Web GA no longer crashes on Agency when selecting record in Paid Production grid.

Documentation Updates

The following is an addendum to any user guide materials. The new feature and functionality is explained for:

Bonus Reconciliation

For Installation updates and WebGA Installation, please see the OIGA Installation & Upgrade Guide.

Bonus Reconciliation

A Bonus Reconciliation feature has been added to Oracle Insurance GA (OIGA). This feature allows users to complete revenue projections (commissions, overrides and bonuses) and reconcile bonuses to expected amounts. Bonus Reconciliation contains an “Other Comp Schedule” component that can be used as a building block for other types of expected bonus calculations. New bonus transactions can be mapped for bonus reconciliation on a carrier data feed.

Plan Administration

- Carrier Generic Contract
- Plan Flat Rate in Commission Schedule

Agency “Other Compensation” Schedule

Case Commissions

- Case Commission Hierarchy – Display Bonus Schedule
- Case Commission Distribution – Display Expected Bonus

Commission Transactions

- Commission/Override TRX – Show Expected Bonus
- New MGA Bonus TRX – Reconcile Bonus
- New Override/bonus TRX – Reconcile Override & Bonus
- Batch – Transaction Balance

A wizard will walk users through set up.

Plan Admin – Commission Schedules

1. Add generic contract “MGA” bonus to database.
2. Add bonus to schedule to row 2.

Plan Admin – Commission Rates

3. Add flat bonus Rate
4. Calculated from the premium assigned to a premium component.

Agency Entity – Other Compensation Schedule

5. Run “Other Compensation Schedule” activity on the agency linked to the corporation.
6. Select Insurance carrier.

Other Compensation Schedule

7. Select lines of business.
8. Select bonus schedule.
9. Select “Start Date” for the effective date on the bonus schedule.
10. Select “End Date” to terminate the bonus schedule.

Agency Agreement – Other Compensation Summary

11. Summary of the bonus schedule.

Case Commission Hierarchy – Case – Bonus Schedule

12. Rename “Over Sched” to “bonus Sched”.

13. On BGA line display bonus schedule.

Case Commission Distribution – Expected Bonus

14. Add type of commissions – bonus.

15. Display BGA expected bonus.

16. Display annualized or modal bonus based on “Premium Component”.

17. Show bonus details such as “Rate”.

Transaction – Displaying Expected Bonus

18. Commission override TRX functionality remains the same.

19. Display in row #2 the BGA expected bonus.

20. This applies to the “Commission Adjustment”, “Charge Back of Commissions”, New “MGA Bonus”, New “Commission and Bonus” transactions.

“MGA Bonus” Transaction – New Transaction Type

MGA Bonus TRX Rules

- New Transaction Type “MGA Bonus”.
- Case Transaction Finds Case like Commission / Override TRX.
- Paid-to-Date does not change.
- Agent Payable remains “0” amount.
- Bonus Net represents the same calculation amount as in the Bonus Amt in the Case Commission Distribution.

MGA Bonus TRX - Rules

- Recalc Premium will recalculate the Bonus Net only.
- Agent Commissions are displayed but not added to Database for Commission Earnings. If that can't be accomplished, then do not display in the MGA Bonus Transaction.
- Bonus Net Recalc Button Affects Status Only.

“Commission & Bonus” Transaction – New Transaction Type

Commission & Bonus TRX Rules

- New Transaction Type “Commission & Bonus”.
- Transaction functions exactly like the “Commission / Override” Transaction.
- Add Field “Bonus Net”.

Commission Accounting – Transaction Log

21. Add column Bonus Net.
22. If no space for Bonus Net column, then put Bonus Net amount in the GA Net column from MGA Bonus TRX.
23. If no space for Bonus Net column, then put sum of GA Net + Bonus Net amount in the GA Net column for Comm. & Bonus TRX.

Commission Accounting – Batch – Transaction Balance

24. When a “GA Net” amount in a transaction is recorded in the database, it is added to the transaction balance on the Batch summary screen.
25. The same needs to apply to the “Bonus Net” amount. The “Bonus Net” amount needs to be also automatically added to the transaction balance.
26. If the “Commission and Bonus” transaction type is selected, then both the “GA Net” and the “Bonus Net” are to be added to the transaction balance.

Pre-Bonus Reconciliation

- The new “Commission & Bonus” transaction can also be used to pre-reconcile the bonus prior to receiving the bonus check.
- Use the “Commission & Bonus” transaction to record your overrides and leave the expected bonus net amount in the transaction.
- Run the Commission Summary Report on the Batch log to get the total bonus amount.
- Run the “Bonus Comp” transaction to back out the total bonus amount because the check was not yet received.
- When the bonus check does arrives, then run the total expected bonus based on earnings by using the Commission Production Report. Compare the report to the bonus statement.
- Run a “Bonus comp” transaction to record the bonus. This process eliminates the step of having to manually run each bonus transaction if the carrier was not electronically sending the bonus detail.

Batch Summary Report

- Add Bonus Net totals to the Batch Summary Report

Commission Production Report

- Add Bonus Net to the Subtotals.
- Add to the Required Parameter for Displaying Columns “Bonus Earning”. This will replace the column “Agent Earning” if selected.

Production Detail Report

- Add in Required Parameters “Bonus and GA Expected Earnings”.
- The columns displayed would be “Bonus Earnings and GA Earnings”.



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