

# **Oracle® Insurance Policy Administration**

## **Release Notes**

Version 10.0.0.0

Document Part Number: E40981\_01

October, 2013

Copyright © 2009, 2013, Oracle and/or its affiliates. All rights reserved.

#### Trademark Notice

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

#### License Restrictions

##### Warranty/Consequential Damages Disclaimer

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

##### Warranty Disclaimer

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

##### Restricted Rights Notice

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are “commercial computer software” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

##### Hazardous Applications Notice

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate failsafe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

##### Third Party Content, Products, and Services Disclaimer

This software or hardware and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

## Table of Contents

<b>ORACLE INSURANCE POLICY ADMINISTRATION</b> .....	<b>4</b>
CUSTOMER SUPPORT.....	4
ORACLE INSURANCE POLICY ADMINISTRATION.....	4
<i>Group Insurance Support</i> .....	5
<i>Other Enhancements</i> .....	7
SUPPORTED TECHNOLOGY.....	9
<i>Application Servers</i> .....	9
<i>Databases</i> .....	9
<i>Operating Systems</i> .....	9
<i>Java</i> .....	9
<i>Browser</i> .....	9

## Oracle Insurance Policy Administration

Oracle Insurance Policy Administration (OIPA) is a next-generation, flexible, rules-based insurance solution for life and annuities that supports policy processing across multiple lines of business. OIPA greatly enhances ease of use and speed for business analysts, actuaries and others involved in the product configuration process. Robust navigation also makes it easy for users, including CSRs, to locate policy information and drill down into a granular level of customer detail. This allows insurers to respond more rapidly to customer inquiries, reduce call times and improve customer service.

These release notes contain the enhancements that were made to Oracle Insurance Policy Administration GA release 10.0.0.0, 2013.

## Customer Support

If you have any questions about the installation or use of our products, please visit the My Oracle Support website: <https://support.oracle.com>, or call (800) 223-1711.

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Oracle Insurance Policy Administration

This section describes configuration, features and technology specific enhancements for GA release 10.0.0.0.

## Group Insurance Support

OIPA is now able to support both group and individual insurance products under a single framework. The major areas of the new group functionality are highlighted below.

### General Customer Information

- A new Group Customer screen has been added to support the creation of group customers, as well as to support the viewing and editing of existing group customers.
- A new Group Customer Search screen has been added to allow the user to search for group customer records.
- Multiple addresses can now be added for a single customer, with support for international addresses. When a new address is being added, the types of addresses available are dependent on the type of client to which the address is being added.
- Multiple phone types can now be added for a single customer, with support for international phone numbers.
- An Alternate Name screen was added for entering and editing alternate names for clients and group customers.
- Each individual policy has a Primary Member (i.e. sponsor) role linking it to the Group Customer providing the benefit plan. The sponsor and/or each eligible dependent who elects to participate will have an additional, separate Participant Role on the policy (certificate) attached to the appropriate plan coverage (sub-plan/segment). These Participant Roles may all link to the same plan coverage, or may link to multiple plan coverages.

### Activities

- A new Group Customer Activity screen has been added.

### Agreements

- New agreement functionality can be used to capture information for a contract/group policy, as well as any other defined arrangements between a carrier and group customer. Agreements provide links to products required to support a group customer's plans, as well as links required to associate classes and their members to available plans and applicable financial reporting.
- Group Customer-specific plans and plan segments can be created under a group customer agreement. Each plan must be based on an existing product available to that group customer via the applicable product agreement.
- Agreements can be created via the new Agreement screen. This screen also allows the user to view agreement categories and the details of each agreement within a category. Dependencies/relationships between agreements will display as a hierarchical "tree."
- The new Agreement Role screen allows user to:
  - View existing agreement roles
  - Add a new client of a specific role type
  - Find and add clients as agreement roles
  - Edit the details of an agreement role
  - Delete an agreement role

- Agreement roles can be added via activities.

### **Classes and Class Groups**

- Classes and Class Groups provide an organizational tool that allows a group customer to classify its associates/employees based on specific criteria, such as for eligibility, billing or reporting purposes.
- Classes can be created and edited on the new Class screen. The fields displayed on the Class screen are dependent on the class' type.
- Class groups can be created and edited on the new Class Group screen. The fields displayed on the Class Group screen are dependent on the class group's type.
- Class Rule Variables can be configured to dictate the exact criteria required for an individual to become a member of a class.
- The exact coverage available to members of a class is controlled by sub-plans attached to the class. Sub-plans are added to classes on the new Plan Coverage screen.
- The new Class-Sub-Plans screen allows the user to view all of the Class-Sub-Plan associations for a selected class. Class-Sub-Plan associations can also be deleted from this screen.
- The new Class-Sub-Plan Participants tab of the Class-Sub-Plan screen displays data related to participants enrolled in a particular Sub-Plan.
- Changes to classes and class groups can be keyed in on the Class Group screen, with the history of changes made to classes/class groups also displaying on the screen.
- Global class definitions and class groups can be copied. Global class definitions are copied by first adding a child class to an existing class, then selecting **Copy** on the Class Detail screen. Class groups are copied by using the **Add Class Group** button on the Class Group screen.

### **Clients**

- The new CreateClient attached business rule allows for the creation of new clients via activity processing.
- The ClientSearchScreen now displays client relationships in the results of a client search.

### **Client Relationships**

- Client/customer relationships can be used to link two clients together.
- Changes to client/customer relationships can be keyed in on the Class Group screen, with the history of changes made to classes/class groups also displaying on the screen.
- The new Client Relationship screen allows the user to view, edit or create relationships between a group customer and another group customer or an individual client.

### **Data Intake**

- Data Intake is integrated functionality implemented to support the receiving and processing of group customer-supplied data for importing into OIPA.

---

## Products

- OIPA now provides support for products, which are carrier-level "plan templates" that allow for the sharing of plan definitions and rules, segments and transactions. Group customer-level plans represent unique instances of a product.
- Segments and the PlanScreen business rule will automatically inherit data configured at the product level.

## Other Enhancements

### Clients

- The LegalResidenceCountryCode field on the Client screen can now be configured to display only the customer's defined country values.
- The method by which results from a client search are sorted is now configurable.
- Agreement and Class Member roles for a client can now be viewed on the Client screen.

### Disbursement

- Disbursement approvals can now be restricted with regard to the disbursement amount.
- Disbursements are now unable to be approved or disapproved by the same user that processed a given disbursement's disbursement activity.

### Fields

- The following business rules can now be attached to transactions to copy data from activity fields to the corresponding entity fields:
  - CopyToAgreementFields
  - CopyToAgreementRoleFields
  - CopyToClassFields
  - CopyToClassGroupFields
  - CopyToClientAltIdFields
  - CopyToClientRelationshipFields
  - CopyToIntakeFileFields
  - CopyToIntakeProfileFields
  - CopyToIntakeRecordFields
  - CopyToGroupCustomerFields

### Illustrations

- OIPA now supports in-force illustration processing. OIPA will receive illustration request data sent by an external system via an inbound web service. The received request will contain AsXML formatted data that will contain all of the information required to create a policy, as well as the roles and segments that will be utilized during the illustration transaction processing. To support this process, a new Illustration AsFile request type has been added to the system. OIPA will extract the submitted policy and illustration data and insert them into the database. An activity will then be created based off of this data and processed in Quote mode and output XML will be returned to the caller.

### **Navigation**

- Policy-, application-, case- and client-related screens in OIPA can now be accessed directly from external systems.

### **New Business Underwriting**

- Comments can now be added to impairments and requirements.
- Requirements can now be color-coded according to their status. This color-coding is configurable in the CompanyCosmetics business rule.
- OIPA now captures errors that occur during requirement processing and displays them on the new Requirement Error screen.
- Requirement results not matched to a requirement record can be searched for and matched to requirements on the new Unmatched Result Search screen.
- Impairments can now be shadowed via the Assessment screen. Previously-shadowed impairments can also be viewed.

### **Policies**

- The CreatePolicy business rule has been enhanced to allow for the creation of programs and pending activities on newly-created policies.

### **Programs**

- The EndDate column in the AsProgram database table is now nullable.
- Activities can now be used to initiate changes to programs on a specified date.

### **Transactions**

- The existing Client-Financial transaction type has been renamed, and a new transaction type also called Client-Financial has been added to support undo/redo activities.
- Transactions can now be overridden at the product level.

### **Release Management**

- Rules Palette environments can now be given an "IVS Sequence" value in the Web Application Utility. This value assigns the environment a place in the release management sequence. When release packages are being deployed to multiple target environments, they must be deployed in the order specified by each environment's IVS Sequence value.



## Technology-Specific Enhancements

Java was upgraded to JDK 1.7.x.

## Supported Technology

The OIPA 10.0.0.0 application supports the following technology components:

### Application Servers

- WebSphere 8.5.5.0
- WebLogic 10.3.6.0

### Databases

- Oracle 11g (11.2.0.3)
- Microsoft SQL Server 2008 R2 SP2
- DB2 10.1 Fix Pack 2

### Operating Systems

- 64-bit Oracle Enterprise Linux 5.8 for all application servers and databases
- 64-bit Windows Server 2008 R2 SP1 for Microsoft SQL Server 2008 R2 SP1
- 64-bit IBM AIX 7.1 for WebSphere and DB2

### Java

- JDK: 1.7.x

### Browser

- Internet Explorer 8