Oracle® Insurance Rules Palette

Release Notes

Oracle Insurance Policy Administration

Version 10.2.0.0

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Oracle Insurance Rules Palette Release Notes

The Oracle Insurance Rules Palette is a standalone application that can be used in conjunction with Oracle Insurance applications. The Rules Palette allows users to create and configure business rules that support their business process model. Plans hold related policies that share a set of business rules, plan rules, requirements, transactions, segments, plan data and plan values. Copybook functionality enables transactions and business rules to be used across multiple plans, leveraging existing information and reducing configuration time.

These release notes contain the enhancements that were made to the Oracle Insurance Rules Palette GA release 10.2.0.0, 2015.

Customer Support

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Enhancements in the Oracle Insurance Rules Palette

This section describes enhancements that were made to the Oracle Insurance Rules Palette GA release 10.2.0.0.

Claims

Basic Claims Functionality feature is introduced with the following new business rules:

- **CreateClaim**: Provides the ability to configure a client activity-based creation of a new claim.
- **CopyToClaimFields**: This business rule is attached to a transaction to allow one or more MathVariables to be copied from the activity to one or more Claim fields. If the fields are displayed on the Claim screen, the values will be viewable.
- **UpdateClaimStatus**: This business rule processes any status changes on a Claim. Processing the transaction to which this business rule is attached will change the status of the claim to the one specified in this rule.
- One database table has been added to store the claim data: **AsClaim**.

Commission

Basic Commission Functionality feature is introduced with the following new business rules:

- **GenerateCommissionDetails**: This rule can be used to add records to the AsCommissionDetail / AsCommissionDetailField table. When there is need to generate multiple commissions, an element to hold an "ObjectArray" is available.
- **CopyToCommissionDetailFields**: This is a standard CopyTo business rule, which can be used to update Fixed fields and Dynamic Fields (with the exception of StatusCode).
- **UpdateCommissionDetailStatus**: This rule allows the status of one or more Commission Detail records to be updated by an activity.
- **CommissionDetailScreen**: This rule can be used to define the dynamic fields for a Commission Detail record.
- Two database tables have been added in support of the Commission feature: **AsCommissionDetail** and **AsCommissionDetailField**.

Widgets

Customized View and Landing Page feature is introduced with the following business rules that can be configured.

- **ActivityWidget**: A new BR to define a list of top 20 activities saved by the user in OIPA.
- **ClientWidget**: A new BR to define a list of clients added or updated by the user.
- **CustomerWidget**: A new BR to define a list of Group Customers added or updated by the user.
- **PolicyWidget**: A new BR to define a list of Policies created or updated by the user.
- **SearchWidget**: A new BR to define a search on Policy, Client, Group Customer, and Case through links to the existing search pages.
- **TaggedCaseWidget**: A new BR to define a list of Case records the user is currently watching and adds the Watch/UnWatch button on the Case Screens.
- **TaggedClientWidget**: A new BR to define a list of Client records the user is currently watching and adds the Watch/UnWatch button on the Client Screens.
- **TaggedCustomerWidget**: A new BR to define a list of Customer records the user is currently watching and adds the Watch/UnWatch button on the Customer Screens.
- **TaggedPolicyWidget**: A new BR to define a list of Policy records the user is currently watching and adds the Watch/UnWatch button on the Policy Screens.
- **WidgetSettings**: A new BR to define the default landing page settings.
- Two database tables were added to support the **Widget feature**: **AsTag** and **AsUserPreference**.

Group Customer

- Group Customer Overview feature adds a new **GroupCustomerOverviewScreen** BR, which can be configured to display a summary of the Group Customer data.
- A new feature allows a Group Customer to be designated as a source of a **group copy function**. All Group Customers designated as such can be searched via a new search screen off the Customer menu.
- **GroupCustomerScreen** BR is also modified to add the new fixed field 'ALLOWEDFORCOPY'. The new field allows a user to designate the Group Customer's data as a potential source for the new **group copy function**.
- A data column has been added to AsGroupCustomer**:** **AllowedForCopy**. This new data column will contain a value that identifies the GroupCustomer as a potential source for the **group copy function**.
- Group Customer functionality introduces a new **AutomaticCustomerNumber** BR and a new element to the **GroupCustomerScreen** which allows the automatic creation of a Group Customer Number as the Group Customer is created. Various options allow automatic or conditional creation.
- **Multifield** support is now provided for the Group Customer, Agreements (AgreementDefinition), and Plan Segment (SegmentNames) screens. This will allow configuration for multiple sets of dynamic field values to fully support group processing.
- **Multifield** support is also extended to the **CopyToAgreementFields** BR.
- **Fixedfield** support is enhanced for the **GroupCustomerScreeen** and **PlanScreen** business rules. These rules will now allow for the configuration of their respective fixed fields and include the Display, Expanded, Query, Hidden, Disabled, and Required tags.
- The existing Comments feature is enhanced to accommodate comments for the Group Customer. The **CommentsScreen** and **CommentsSearchScreen** BRs will allow for the same configuration and definition of comment templates as other entities with the comment feature. Security will allow user access to create and maintain the comments.
- One database table has been added to accommodate Group Customer Comments: **AsGroupCustomerComments**.
- The copy Class feature is being enhanced so that all of the data and Plan Associations from the original class time value record are copied to the target time value record.
- Participant membership eligibility has been dependent on the Employment relationship. That has now been altered to be dependent on the Primary Enrollment Relationship defined by the Group Customer.
- The Plan History screen has been enhanced to list all Members enrolled in a plan. A new tab will present this data: **Members**.

Searching, creating and modifying Rates

- Searching, modifying and creating Rate Groups and Rates has been extensively enhanced. Part of that enhancement allows Rates to be imported and exported through an OIPA screen using a specifically designed Excel worksheet.

- **LinkRateGroupSearchScreen** BR is introduced to provide the ability to create relationships with entities such as Company, Group Customer, Product, Plan, Class, etc. It allows configuration of the **LinkRateGroupSearchScreen** to enable contextual search of the Rate Groups and display of their relationships.
- **RateScreen** BR is introduced to define an ability to spawn activities upon the modification to the expiration of the Rate Group or the rate's criteria.
- A data column has been added to the AsRateGroup database table: **ExpirationDate.**
- A new database table has been added to store Rate Group relationships to various entities: **AsRateGroupRelationship**.

ListBill Support

List Bill support screen feature introduces the below new business rules:

- **ListBillScreen**: This new BR defines the dynamic field data that will be captured for each policy in a client list bill. The rule also defines the columns to be displayed in the ListBill user interface.
- **AddToListBill**: This new BR specifies the Client record who's ListBill will receive the new billing record(s). The rule passes transaction values to the specified Client List Bill using standard From/To fieldsyntax.
- **RemoveFromListBill**: This new BR replaces the v8 rule RemoveFromClientGroup. It specifies the ListBill records to be removed from the list.
- **CopyToListBillFields**: This new BR replaces the v8 rule UpdateClientGroup. It specifies the active ListBill record whose values are to be changed. The rule passes transaction values to the specific List Bill record using standard From/To field syntax.
- Two database tables have been added to support the **List Bill** feature: **AsListBill** and **AsListBillField**.

Billing

- **FindBillDetail** activity function is enhanced to provide an array of entities to which the bill details are related. This will provide additional support for business validations and bill processing.
- **MaintainBillDetailReconciliation** BR definition has the <SuspenseNumber> and <SuspenseType> configuration elements removed.
- The **SuspenseNumber** and **SuspenseTypeCode** columns have been removed from the **AsBillDetailReconciliation** database table.
- A new tab **Billing** will be presented from Activity Results. This tab will display billing data created by the execution of the activity. For activities that do not create billing information, the message "No Billing Performed" will be displayed in the contents of the tab. Security will provide view access to the contents of the tab.

Access to Premium Tracking

- **Premium Tracking** of the past was re-named **Financial Tracking.** Prior implementation of the feature limited access of the Financial Tracking information to transaction Math. **InquiryScreens** and the **PolicyValues** BR are now enhanced so that their Math has the same Financial Tracking capabilities. The InquiryScreen definition and ValuesScreen BR both offer some control over the ability to execute the Financial Tracking logic that may be contained in the PolicyValues BR.

Programs

- A new policy level transaction BR, **MaintainProgram,** is introduced to support Program Activity Spawning from Non-Program Activities. It allows only one instance of each Program Action to be configured in each MaintainProgram rule.
- A new business rule **ProgramAllocationScreen** BR is introduced that enable program specific overrides to allocations.
- The **TransactionAllocationScreen** BR will support Program allocations as one of the default allocation presentations.
- The **WriteDefaultAllocation** BR will allow the update of the program's allocation.
- An activity's **Spawns** section will be able to pass a program's allocation to the spawned activity. The Activity object is similarly modified.
- A new database table was added to support this Program's allocation feature: **AsProgramAllocationSet**.
- In addition, a column was added to provide **ProgramDefinition** overrides to business rules.

Allocations

- The **ReassignAllocations** BR now supports a set of model fund allocations as its output. This output would then be used by Assignment processing.
- **TransactionAllocationScreen** BR and **PolicyAllocationScreen** BR are modified to provide Action/Events support that allows configuration to Enable/Disable specific Model, From Allocation and To Allocation sections.
- Logical "and" and "or" relationships have been added to the Model filtering capability.

Other Rules

- **MVAAmountFormula** rule is modified so that the MVAAmount for funds and deposits can be saved to dynamic fields during activity processing and to **ScheduledValuation** columns during scheduled valuation processing. This feature change also allows valuation object information to be available to the MVAAmountFormula. Columns were added to database tables to complete the feature:

DepositMVAAmount to **AsScheduledValuationDeposit** and **FundMVAAmount** to **AsScheduledValuationFund**.

- **PolicyOverviewScreen** rule is updated to allow configuration of the data presented in the Role grid, filter the Role data presented by the Role's status and RoleCode. These same capabilities are duplicated in the SegmentRole section.
- **InterestRateCalculation** rule is enhanced with an optional attribute added to the GuaranteedInterestRate element. This attribute will indicate which interest rate, current interest rate or guaranteed interest rate, will be used by the valuation routines when it calculates interest for the fund, At times the lower versus higher interest rate is desired.
- A new BR, **CopyToPhoneFields,** is introduced, which provides the ability to update phone information through an activity.
- The **Fields** and **Math Elements** are enhanced to store and display encrypted and decrypted data as required.
- The **AddressScreen** BR enhancement allows configuration to sort or order the list of country codes appearing under the Address screen.
- **EligibleSegmentNamesByPolicyStatus** BR enhancement introduces the <Tests> element to limit the available segments based on the defined/configured test conditions.
- If an activity is created and processed using **AsFile**, Math Variables of the processed activities are available to the response result. Various elements and attributes are available to specify the variables and activities that may be included in the response.
- OIPA can now administer basic services and benefits for supplemental group health and group dental. These will be managed at the segment level. The feature introduces a new **BenefitScreen** BR, which can be configured to define benefit attributes such as coinsurance, per day allowed amount etc at the segment level for each of the services under the service groups. Two database tables have been added: **AsService** and **AsServiceGroup**.
- Multiple **time value records** for any one entity could exist with the same effective date. This has been modified so that no two time value records for an entity may exist with the same effective date.
- Machine details have been added to **AsValuesRequest** table so that Scheduled Valuation errors can be more readily tracked. Machine details include machine name, member name, member id and thread number.
- Basic **Commission** record keeping has been implemented in this release. Single or multiple commission records are created by OIPA activity processing. Activity processing will also perform status and general maintenance updates.
- The **AddRoles** BR can now add multiple Clients to a specific Role with each receiving their own Role Percent. The sum of all Role Percentages being added cannot exceed 100%.

Release Management

- Release packages that have been deployed to a target environment can now be "rolled back," i.e., un-deployed from the target environment.
- 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.
- Release packages are now given a deployment order. Each package must be deployed in the proper sequence or an error will occur.

Security

- Rules Palette security is now environment-specific, rather than being shard across all environments and tracks in the same IVS database.

Palette

- A Product Copy utility has been added to the Palette. It is modeled on the Plan Copy utility and has the potential to copy all entities known by a specific ProductGUID.

Deprecated Items

N/A

Technology-Specific Enhancements

Type of Software	Software Product	Version
Database	SQL Server	2014 on Windows => Windows Server 2012 R2 x86_64
	Oracle	12c R1 12.1.0.1
	DB2	10.5 Fix Pack 5
J2EE Application Server	WebSphere	8.5.5.0
	WebLogic	WLS 12c(12.1.2)
Operating System	Oracle Enterprise Linux	Oracle Linux => 6 u5 x86_64
	Windows Operating System for SQL Server	Windows Server 2012 R2 x86_64
Java	JDK	1.7 Update 71 64-Bit
Internet Browser	Internet Explorer	10