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Oracle Insurance Policy Administration Release Notes

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 11.0.0.0, 2016.

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Features / Enhancements in OIPA

This section describes configuration, features and technology specific enhancements for GA release 11.0.0.0. OIPA is now able to support the below functionality:

New Features Added

Adoption of Oracle JET UI Framework and Redesign of User Interface

The UI technology stack has been updated from IceFaces to Oracle JET Framework for Rich UI components and REST service based application. The User Interface has been redesigned in v11 to enhance the User's experience. The screens have been redesigned with input from Oracle's User Experience team and Customer usability enhancement requests. The application has been reorganized to streamline processes and improve flow and readability of information.

Refer **V10 vs V11 Comparison** document to see the redesign of user interface.

Unified Search

The unified search feature combines all the different entity search mechanisms into single search mechanism providing the flexibility to navigate across all the screens from a central location. It provides 'quick search' capabilities for more frequently searched entity and attributes that the user typically searches as the default search criteria. User has the flexibility to go to advanced search by adding more search criteria to get more refined results.

Central Add Capability

This feature enhances the user ability to enter/create new entities into OIPA from a central location. The entities to be created will be listed in a drop-down as "Policy, Client, Customer, Case" etc., the user can set their order preference. Security will dictate, which entities a user is authorized to add. The user can access this grouping functionality from any context that OIPA may present.

Entity Summary Enhancement

As part of the OIPA UI JET upgrade, the application layout is redesigned where the 'Entity' screens consists of a 3-pane layout:

- » The Navigation List pane
- » Page / Form entry / Display pane
- » Entity Summary pane, which is visible from all entity screens and can be collapsed.

The "Policy, Client, Customer, Suspense, Group / List Bill" screens support the entity summary. Also, the 'Unified' Search Results (Quick Search or Advanced) will display the summary information for the selected Entity.

Session Timeout Warning

This feature allows the user to configure session management in OIPA with a grace period. It introduces a popup message notifying users about session timeout, the user can elect to continue the session or will be logged out. The configurator will have the flexibility to set the grace time (time between display of popup till expiry of session) by setting the Session.warningtimeout in pas.-properties.

User Preference Settings

This feature allows the individual users to set the OIPA dashboard with personalized preferences as per their requirements. The user can set:

- » Home page widgets and layout
- » Quick Search preferences (set default entity to search)
- » Central Add preferences (set default entity to add)
- » Show or Hide Entity and Search Summary pane.

Enhancements

Manual Case and Application Entry

This enhancement gives OIPA the flexibility to enter the case information via UI into OIPA. The user can create a new case and application using the "Case" option available under Central Add capability. The user shall be able to quickly search a case using the unified search feature along with an advanced search provision to get more refined results.

Separate Suspense Entry and Search functions

This feature separates the Suspense Search functionality from the Suspense Add functionality. It implements adding a suspense record from the Central 'Add/Create' section and searching an existing Suspense record from the Unified Search section.

Ability to Add/Remove users from External system

This enhancement provides the ability to Add, Maintain, and Remove (deactivate) OIPA users from an external system using SOAP Web services. It also allows Addition and Removal of these users from security groups and supports the addition/maintenance of Security Groups. The request can invoke the services with a single or multiple users request for Create User, Edit User, Delete User, AddRole, DeleteRole, and Search Users.

Ability to search user and security group

This enhancement provides the ability to search user and security group from an external system before recreating same user or user role through a web service call. The search can be performed based on user id, first name, last name, gender, security role name, etc.

User Management Audit

This enhancement provides the ability to maintain a log of changes to user data from web services. It creates a log of web service messages and create history of any user changes from the web services.

User account validity & expiry

This enhancement will add effective dates for the user account validity and expiry that allow controlling users access to specific roles in OIPA.

Ability to reconcile a bill in excess of the billed amount

This enhancement allows reconciliation of a bill payment in excess of the full amount. It enables the Bill Reconciliation business rule to add money when adjustment resulted in over reconciliation and flag over-reconciled records.

Ability to manage carriers that operate in multiple regions as a single company

OIPA is enhanced with an ability to manage carriers that operate in multiple regions as a single company. Users of the system can be granted access to multiple regions (not necessarily all) through a single logon ID. It accommodates the variations of different regions that may share many characteristics such as business rules, product definitions, accounting records etc.

Ability to apply a negative reconciliation amount to reduce the amount already reconciled to a bill

This enhancement allows a negative amount to be applied to handle over reconciliation of any bill such as a commission claw back scenario.

Provision to Shadow Client

This enhancement provides the ability to shadow the rejected clients and policies that were created while processing the incoming interface (such as AsFile) when the system encounters validation errors. A new business rule ShadowClient is introduced which shadows the rejected clients

A trigger in valuation to change anniversaries of the Leap Day

This enhancement identifies the leap years and non-leap years through anniversaries of a given date. It determines the correct changes to the fund's interest rate as time passes in valuation. The InterestRateCalculation rule is used to find the interest rate for a fixed fund and then calculate its interest from the last valuation to the next valuation.

Program change behavior when a program is deleted

This enhancement provides the ability to shadow any pending activity specific to the program instance left in the policy's list of activities. A program that added in error can be completely rolled back, negating all affects that occurred and is shadowed. It shadows the program change activities are being left as a pending activity when a Program is deleted from a policy.

Case sensitive fund name ordering in assignment processing

This enhancement provides the ability to fine tune the numeric precision to the interest calculations. It allows the scale of the "time" portion of the interest calculations to be configurable with a minimum of 0 and the maximum of 100 as limits.

Technology-Specific Enhancements

Please refer to the 11.0.0.0 version (part number E78460-01) information published in the Technology Stack section of the Oracle Technology Network (OTN).