ORACLE
Insurance

Oracle Insurance

Data Exchange for Life and Annuity Engine QuickView User Guide

Release 11.0.2

December 2019

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CONTENTS

PREFACE

Welcome to the Oracle Insurance Data Exchange (OIDX) for Life and Annuity (LA) QuickView User Guide.

This guide discusses the following topics:

- Logging in to OIDX
- Search and view policies
- Search and view commissions, if permitted

Audience

This guide is intended for OIDX for Life and Annuity QuickView Users.

Related Documents

For more information, refer to the following Oracle resources:

- The Oracle Insurance Data Exchange Administrators Guide. The documentation for OIDX is hosted online at: https://docs.oracle.com/en/industries/insurance/insurance-data-exchange/index.html

Browsers

OIDX for LA works with Google Chrome and Microsoft IE. Please note that Mozilla Firefox, MacOS Safari and Microsoft Edge may not function as intended.

NOTE	If you have a popup blocker installed, you may need to disable it for OIDX to work properly. You also can enable popups for this site.

Clearing Temporary Files

Because QuickView is web-based, you may need to clear out your browsers temporary file periodically.

Keeping the temporary file clear may improve performance by clearing off space from your hard drive.

Inactivity / Timeout

OIDX for Life and Annuity, a web-based application, logs you out if you are inactive for a length of time. The default setting is **30 minutes**. If timeout does occur, log back onto the system to continue working.

Basic Safety Precautions

It is recommended that you secure your computer when you need to step away to protect the integrity of your work.

Notational Conventions

The following text conventions are in this document:

Convention	Description
bold	**Boldface type indicates graphical user interface elements associated with an action**.
Italic	*Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.*
`Monospace`	`Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.`

Additional Information

For more information, please go to the Oracle Insurance web site at or contact OIDX for LA support at: oidxsupport_grp@oracle.com.

Manual History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1st Edition		V 11.0	January 2018	Initial Creation
2nd Edition		V 11.0.1	April 2018	New enhancements and fixes
3rd Edition		V 11.0.2	December 2019	New enhancements and fixes

Chapter – 1

GETTING STARTED

OIDX for LA gives you access to comprehensive policy and commission data from multiple participating carriers. Policy data can be searched, filtered and viewed as a summary or as an individual policy. If allowed, commission data also can be searched and viewed.

Prior to accessing QuickView you should have received:

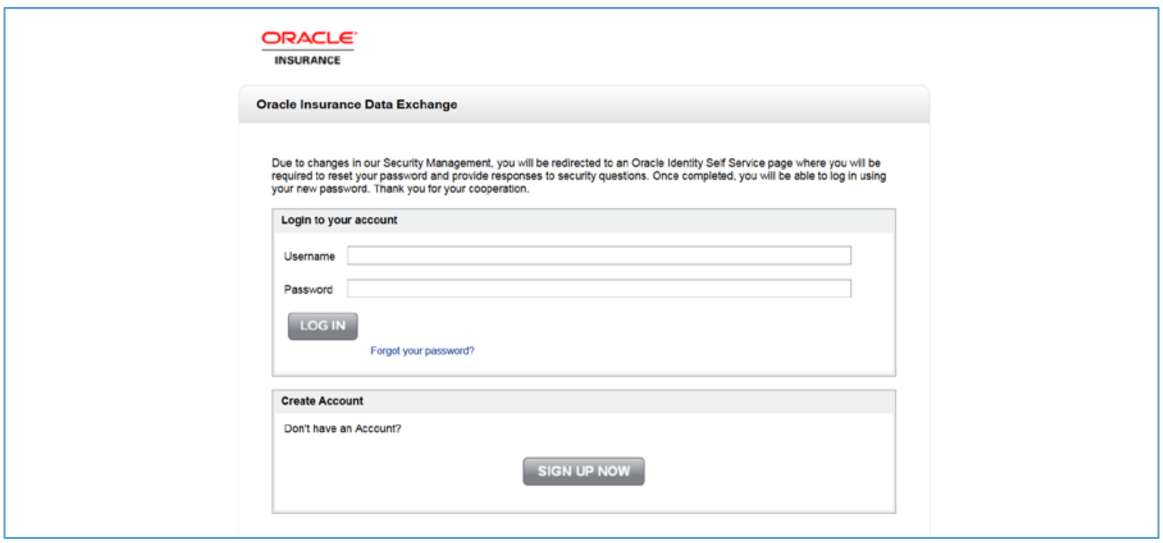
- **QuickView:** For Example, http://example.us.oracle.com:7777/QuickView/faces/Home.jsf
- **Username:** usernames are required.
- **Password:** passwords are required.

Registering for a QuickView Account

Access to QuickView requires a user account. The QuickView user account is an OIDX managed Oracle Identity Manager (OIM) account. The OIM account is unique to OIDX and cannot be used in other Oracle applications or web sites.

If you do not have a QuickView account, you may need to register for one. If you are part of an agency that has a QuickView agency account, please contact your agency administrator to have a user account created for you.

User accounts for QuickView are unique by email address. If the email address used in the registration request is in the system, a new account cannot be created.

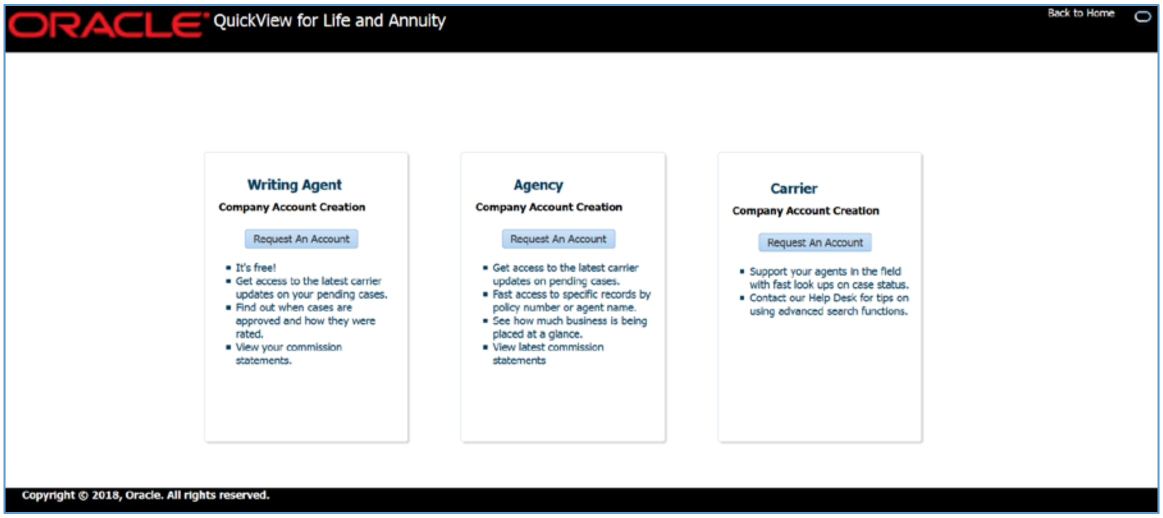


Registering for a QuickView Account

1. To register for a new account, click **SIGN UP NOW**.

2. Select the type of account you need.

3. Click **Request an Account** to open the account setup.



Selecting an OIDX Account Type

In QuickView you can register for one of the following three kinds of accounts:

- **Writing Agent**

  Generally, the writing agent account is for an individual insurance agent licensed to sell life insurance policies and/or annuities. This account type is also for an agency with more than one employee that does not require a principal contact and an administrator. A writing agent user may have contracts with one or more insurance carrier clients. Writing agents can:

  - Search and view polices
  - Search and view commissions
  - View account information
  - Set up carrier relationships

- **Agency**

  Most often, the agency account is for a general agency with one or more users that requires a principal contact and an agency system administrator. A general agency is an organization/company that serves as a marketing and support organization for individual life insurance agents. The principal contact is an individual employed by the general agency that serves as the point of contact for OIDX. The agency system administrator is also an individual employed by the general agency who is responsible for the management of users. Agency users can:

  - Search and view polices
  - Search and view commissions
  - View account information
  - Set up carrier relationships

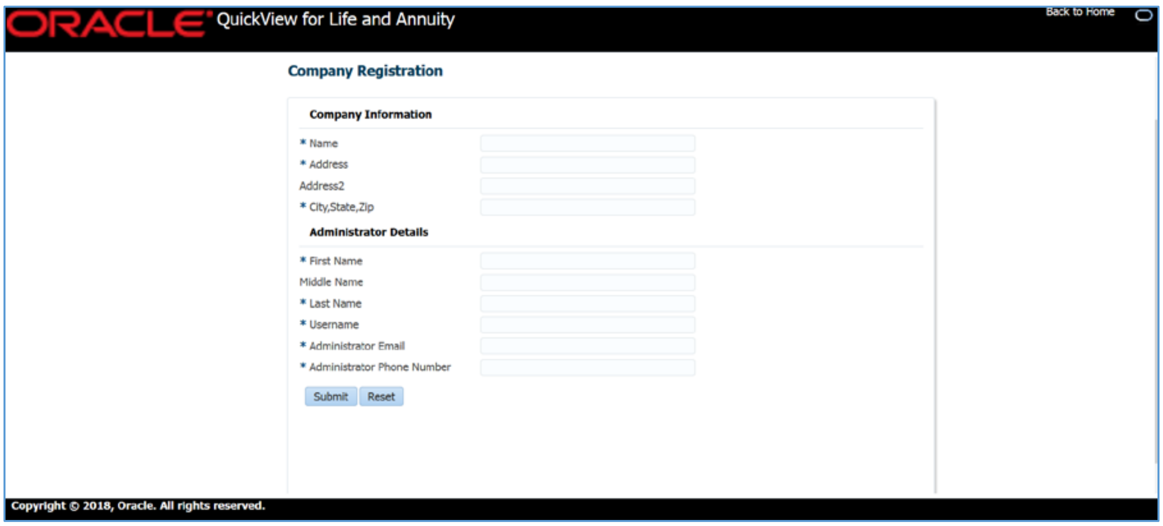
- **Carrier**

  Generally, the carrier user is an individual employed by an insurance carrier that serves as the administrator for the carrier. This is not a common role. Carriers can:

- Search and view polices
- View account information

Creating a Writing Agent Account

A writing agent account can be used by one or more people within the agency. An administrator manages the users but there is no separate principal contact. If QuickView administrators need to contact the agency, the agency system administrator will be contacted.



Writing Agent Registration

* A blue asterisk indicates a required field.

The upper portion of the screen is for company information; the lower portion is for agency administrator details.

Field Name	Description
Name	Company name
Address	Company address
Address 2	Second line for the company address
City, State, ZIP	The city, state, and ZIP code for the company
First Name	First name of the agency administrator
Middle Name	Middle name of the agency administrator
Last Name	Last name of the agency administrator

Username	Username for the agency administrator
Administrator Email	Email address for the system administrator. You must enter a valid email address. QuickView will only be able to process your request or send you notification of activation if you provide a current valid email address.
Administrator Phone Number	Phone number for the agency administrator

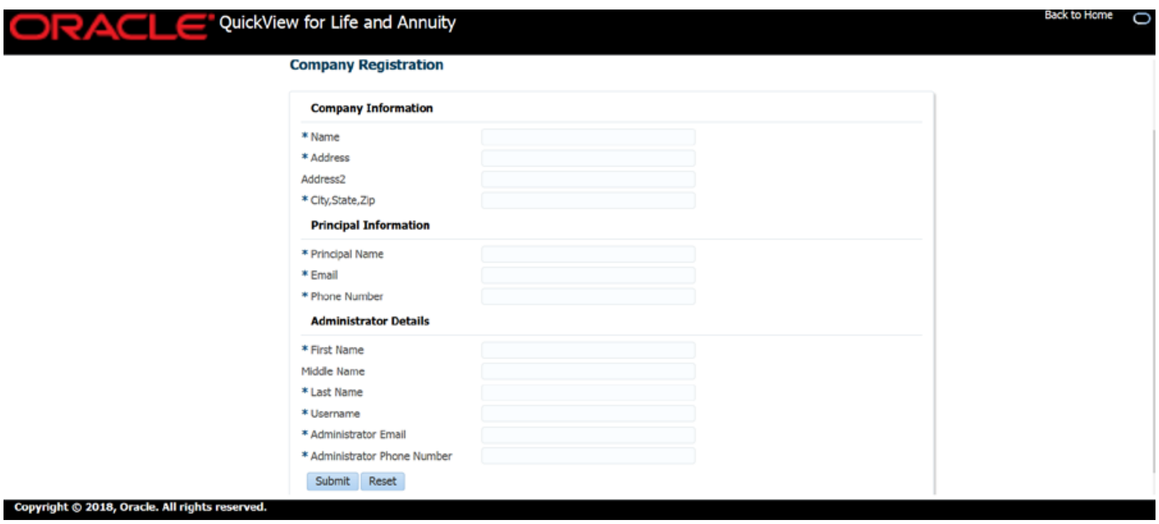
Click **Submit** to submit your registration. The OIDX administrators verify the registration. If approved, the account will be setup and the notification of activation is sent.

If there are errors in the registration form, an error message is presented. Correct the errors and re-submit.

If you want to clear all the fields on the page, click **Reset**.

Creating an Agency Account

An agency account is for a general agency with one or more users that requires a principal contact and an agency system administrator. A general agency is an organization/company that serves as a marketing and support organization for individual life insurance agents. The principal contact is an individual employed by the general agency that serves as the point of contact for OIDX. The agency system administrator is also an individual employed by the general agency that is responsible for the management of users.



Agency Registration

* A blue asterisk indicates a required field.

The upper portion of the screen is for company information; the middle portion is for the principal contact and the lower portion is for agency administrator details.

Field Name	Description

Name	Company Name
Address	Company address
Address 2	Second line for the company address
City, State, ZIP	The city, state, and ZIP code for the company
Principal Name	Principal contact name
Email	Email address for the principal contact. You must enter a valid email address. QuickView will only be able to process your request or send you notification of activation if you provide a current valid email address.
Phone Number	Phone number for the principal contact
First Name	First name of the agency administrator
Middle Name	Middle name of the agency administrator
Last Name	Last name of the agency administrator
Username	Username for the agency administrator
Administrator Email	Email address for the system administrator. You must enter a valid email address. QuickView will only be able to process your request or send you notification of activation if you provide a current valid email address.
Administrator Phone Number	Phone number for the agency administrator

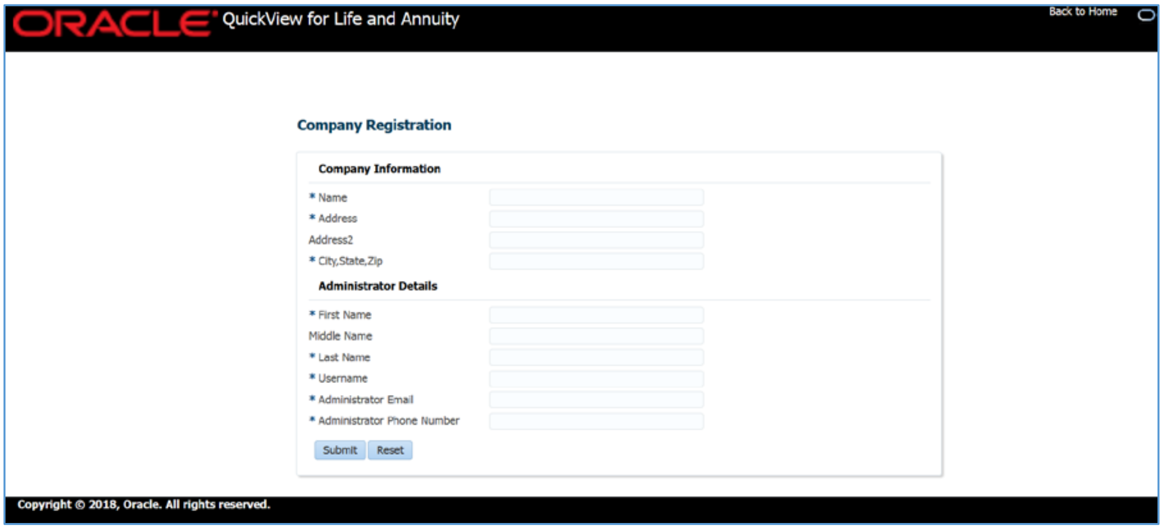
Click **Submit** to submit your registration. The OIDX administrators verify the registration. If approved, the account will be setup and the notification of activation is sent.

If there are errors in the registration form, an error message is presented. Correct the errors and re-submit.

If you want to clear all the fields on the page, click **Reset**.

Creating a Carrier Account

Generally, the carrier user is an individual employed by an insurance carrier that serves as the administrator for the carrier. This is not a common role.



Carrier Registration

* A blue asterisk indicates a required field.

The upper portion of the screen is for company information; the lower portion is for agency administrator details.

Field Name	Description
Name	Company Name
Address	Company address
Address 2	Second line for the company address
City, State, ZIP	The city, state, and ZIP code for the company
First Name	First name of the carrier administrator
Middle Name	Middle name of the carrier administrator
Last Name	Last name of the carrier administrator
Username	Username for the carrier administrator
Administrator Email	Email address for the system administrator. You must enter a valid email address. QuickView will only be able to process your request or send you notification of activation if you provide a current valid email address.

Administrator Phone Number	Phone number for the carrier administrator

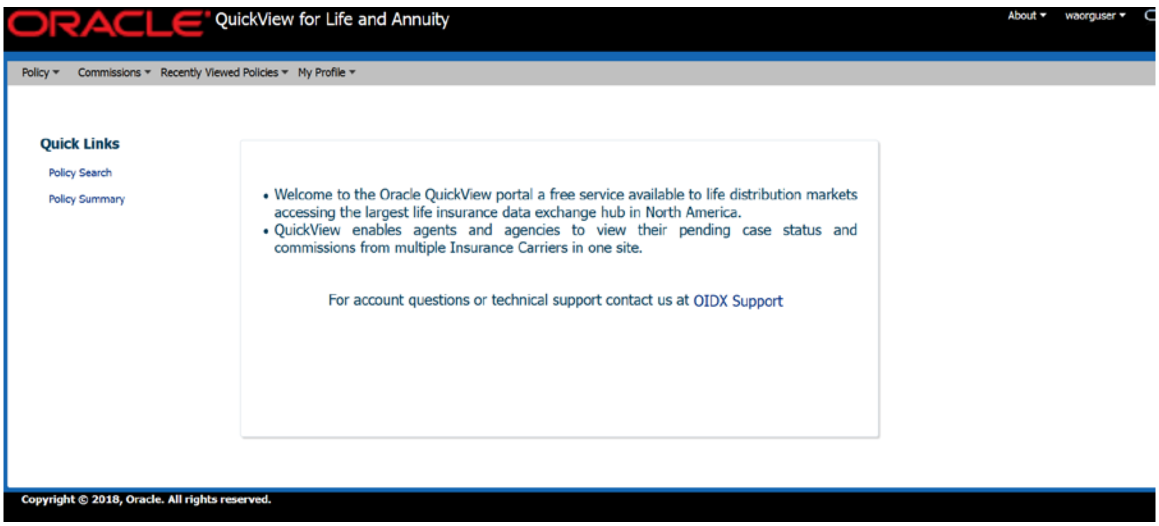
Click **Submit** to submit your registration. The OIDX administrators verify the registration. If approved, the account will be setup and the notification of activation is sent.

If there are errors in the registration form, an error message is presented. Correct the errors and re-submit.

If you want to clear all the fields on the page, click **Reset**.

Home Page

Logging in to QuickView places you on the home page. This page contains links to the available functions and a link for emailing OIDX support. The options displayed in the top menu depend on your role and permissions.



QuickView Landing Page

The options you have depend on the type of user and permissions.

	Writing Agent	Agency User	Carrier User
Policy Search	X	X	X
Policy Summary	X	X	X
Recently Viewed Policies	X	X	X
My Profile	X	X	X

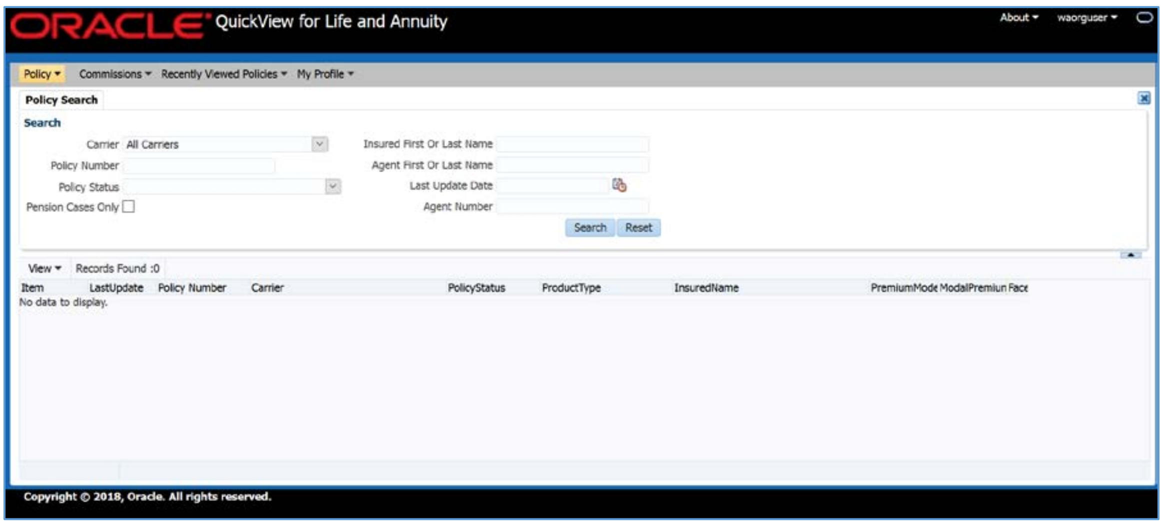
All logins have an About option and User option in the upper right of the top menu.

Logout Option in Top Bar Menu

About contains information regarding the version of QuickView. The User option contains the logout option.

Navigation

Navigation in QuickView functions in following way.



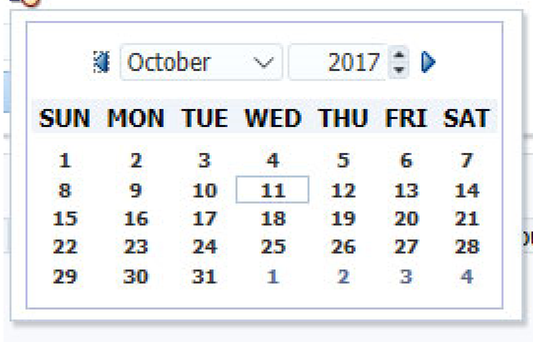
Navigation in OIDX

Icon	Description
	Calendar icon opens the calendar.
	Close tab. Displayed in the upper right of the page. Closes the highlighted tab. When you have multiple tabs open, use the tab key on your keyboard to tab through the open tabs.
	Expands the closed area.
	Collapses the
	Expandable element. Expanding the element displays additional details.
	Expanded element. The element has been expanded to reveal additional details.

	Sort icons for search tabs. Select the column that you want to sort by. Select the up arrow to sort ascending – from newest to oldest, A-Z. Select the down arrow to sort descending – from oldest to newest, Z-A.

Calendar Icon

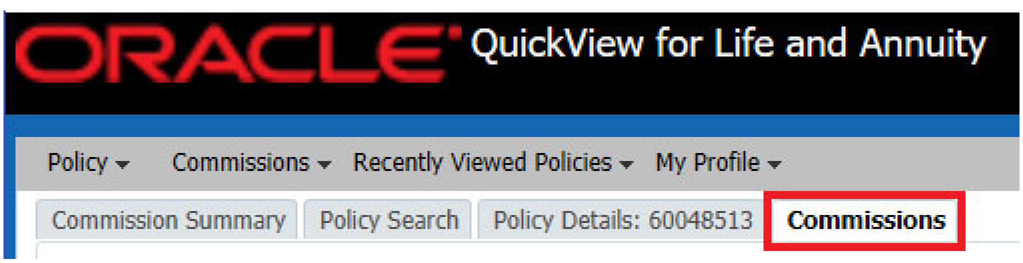
Clicking the calendar icon opens a calendar where the date can be selected. All date/times are GMT.



Calendar Option

Navigating Between Tabs

Options and individual policies open in separate tabs. Multiple tabs can be opened. Use the tab key on your keyboard to tab through tabs left to right. Only one tab is active. The active tab is white and the inactive tabs are gray.



Navigating Between Tabs

Closing Tabs

Active tabs can be closed by clicking the close icon on the far right.

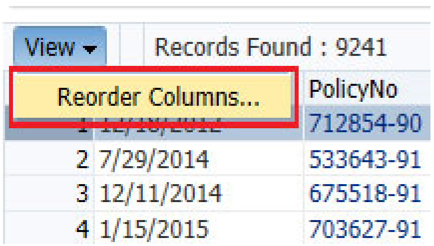
Sorting Columns

Search results columns can be sorted in ascending/descending order or alphabetically A-Z or Z-A order. Select the column where you want to sort and click the column header. Result data is then sorted by this column in either ascending/descending or A-Z/Z-A order. All results are sorted. .

Sorting holds for the current instance only. When you log out, sort values return to default. For policy and commission searches, the default sort order is by carrier. Reordering columns also returns the sort order to carrier.

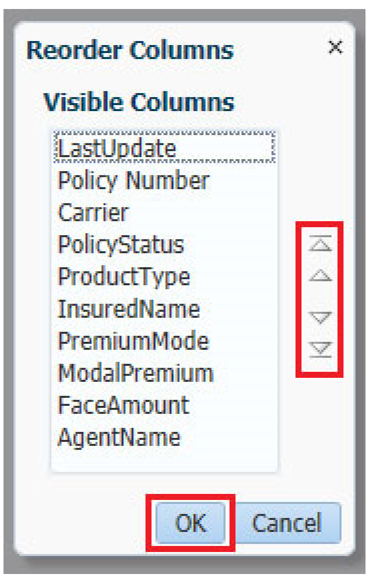
Reordering Columns

Search screens allow you to reorder the information presented. You can select to reorder columns from the view option.



View Option to Reorder

A separate screen contains the columns available and the current order. Use the arrows to move columns up or down the list. Click **OK** to save your selection.



Selecting to Reorder Columns

Reorder selections are only for the current session. When the session ends, the column order reverts to the default.

Chapter – 3

WORKING IN QUICKVIEW

Oracle Insurance QuickView for Life and Annuity (QuickView) gives you access to comprehensive policy and commission data from multiple participating carriers. Policy data can be searched, filtered, and viewed as a summary or as an individual policy. If allowed, commission data also can be searched and viewed.

With QuickView, you can:

- **Search Policies** – Search for one or more policies using one or more filters. Results are displayed in the lower portion of the screen. Results can be refined by adding or removing filters. Results contain links to view individual polices.

- **View Policy Data** – View totals for cases, face amount, and total premium. Totals are grouped by carrier. Expand carrier data to view subtotals by line of business and policy status. Within the subtotals, you can further drill down to view individual polices.

- **Search and View Commissions** – If permissions are set, you can search and view commissions in the same manner as policies.

- **Access Your User Profile** – Your user profile on the **My Profile** link contains the information entered when the account was setup. This is a read only screen. For agency users and writing agents, the option to add new carriers and to view the status of the requests is also presented.

Logging in to QuickView

Access to OIDX requires a user account. Prior to accessing QuickView you should have received:

- **QuickView URl:** for example, http://example.us.oracle.com:7777/QuickView/faces/Home.jsf

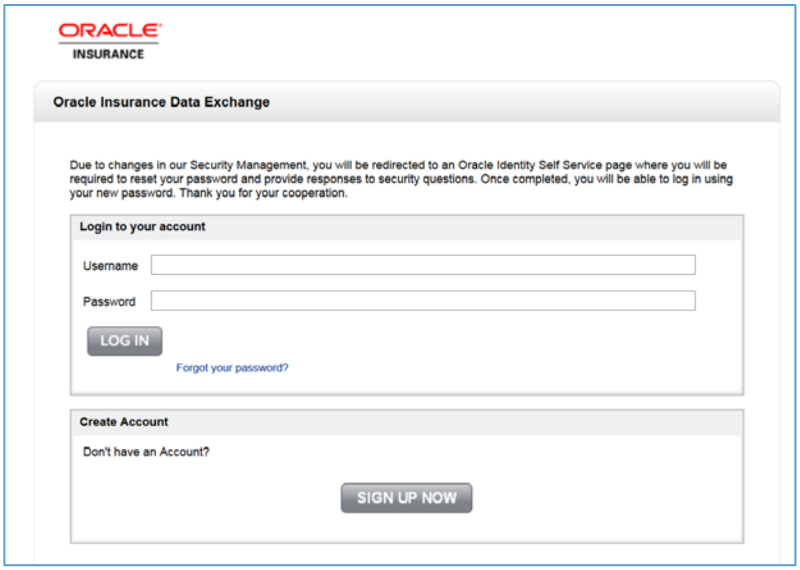
- **Username:** usernames are required.
- **Password:** passwords are required.

If you do not have this information, please contact your Organization's Oracle Insurance QuickView (OIQV) administrator.

Access QuickView through a login screen. To *login*, enter your username and password and click **LOG IN**.

A successful login places you on your Home tab.

A failed login shows an error message. Please correct any errors and try again. If you cannot log in, please contact your Organization's Oracle Insurance QuickView (OIQV) administrator.



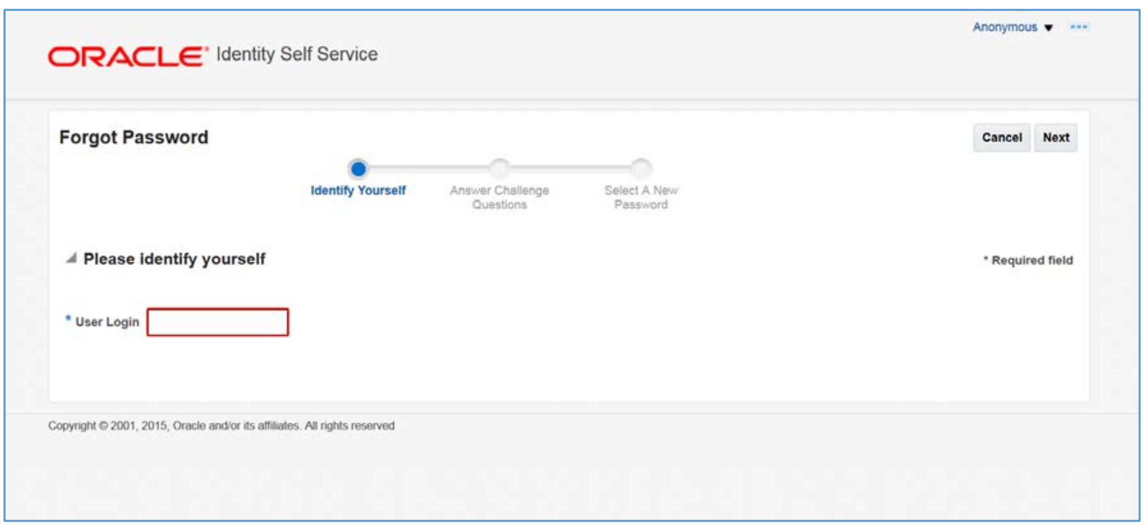
OIDX Login Screen

Password Help

Password help is a part of the Oracle Identity Self Service and not a part of OIDX. Changing your password is done in the Oracle Identity Self Service application.

If you have forgotten your password you have the option of resetting your password.

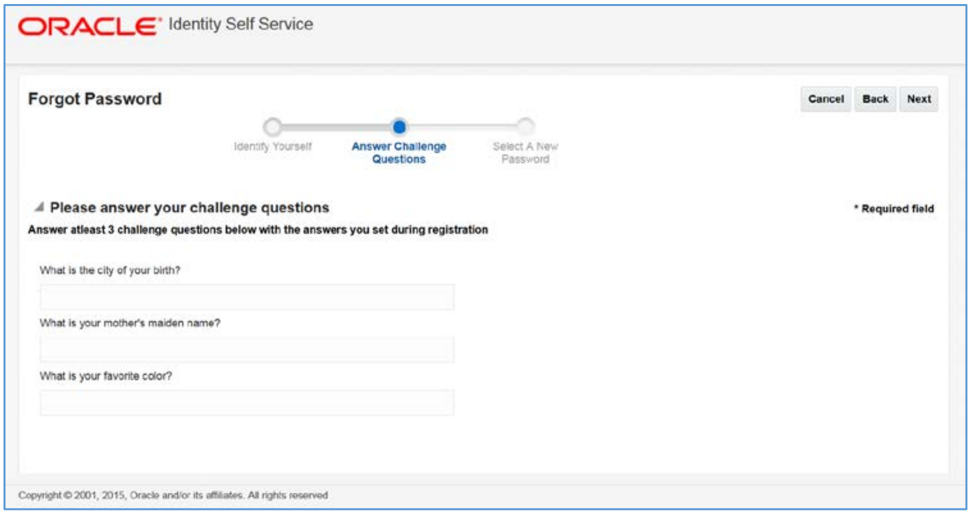
1. Click the **Forgot your password?** link.



Changing Password

2. On the Oracle Identity Self Service page, enter your user login name and click **Next.**

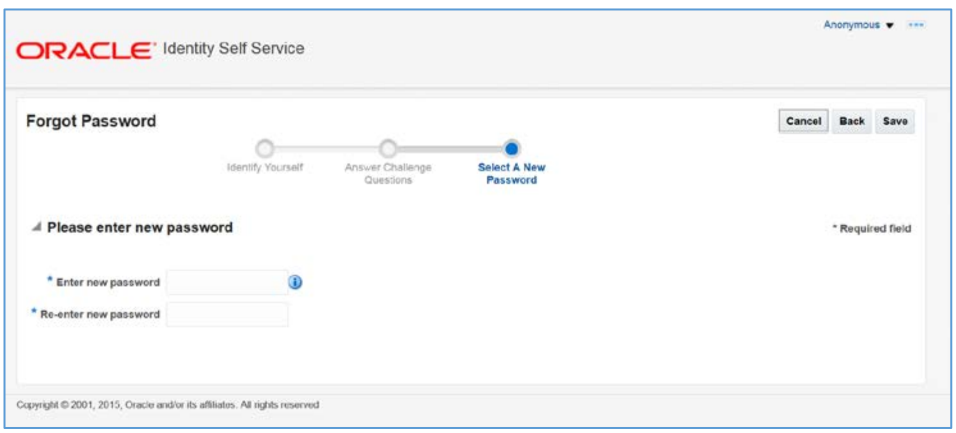
3. Answer all of the challenge questions selected when the account was set up.



Challenge Questions Screen

A successful response allows you to reset your password. If you do not know the answer to the challenge questions, please contact your Organization's Oracle Insurance QuickView (OIQV) administrator for assistance.

4. Enter and re-type your new password in password management screen. Click **Submit** to reset the password.



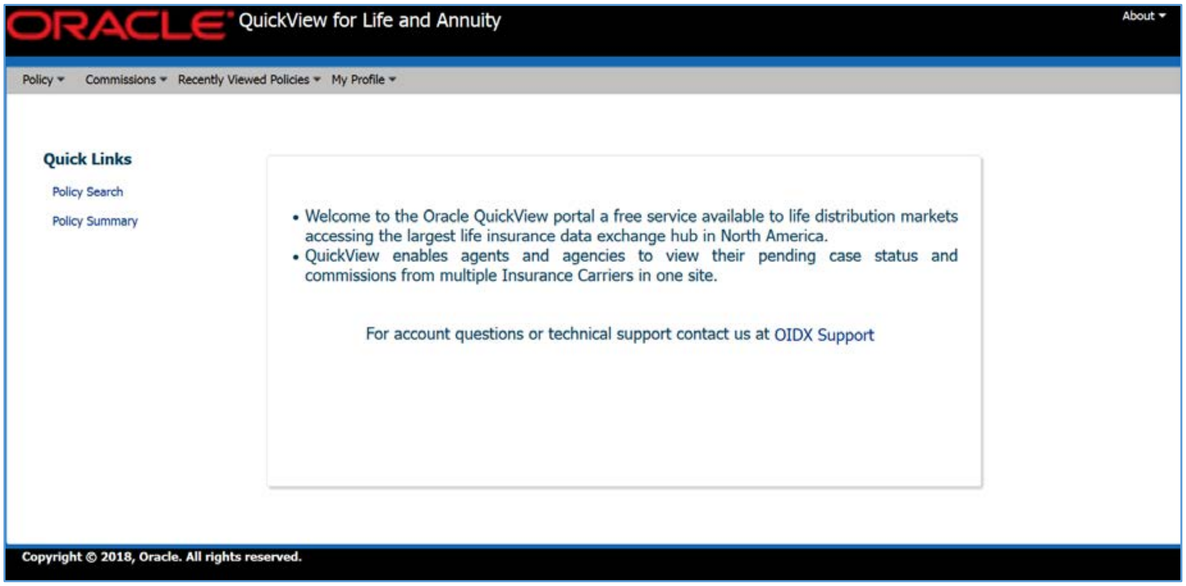
NOTE	If you attempt to log in with the wrong password four times in a row, your account will be locked. A message is displayed: *"Your account has been locked. Please contact the Oracle Insurance QV Help Desk at* oidxsupport_grp@oracle.com *to un-lock your account!"*

Accessing Your QuickView Account

Your QuickView account requires approval from your administrator. The administrator can set your account status to one of the followings:

Approved Status

Once your account is validated by administrator, you can access the QuickView. You are successfully placed on the QuickView home page after log in.

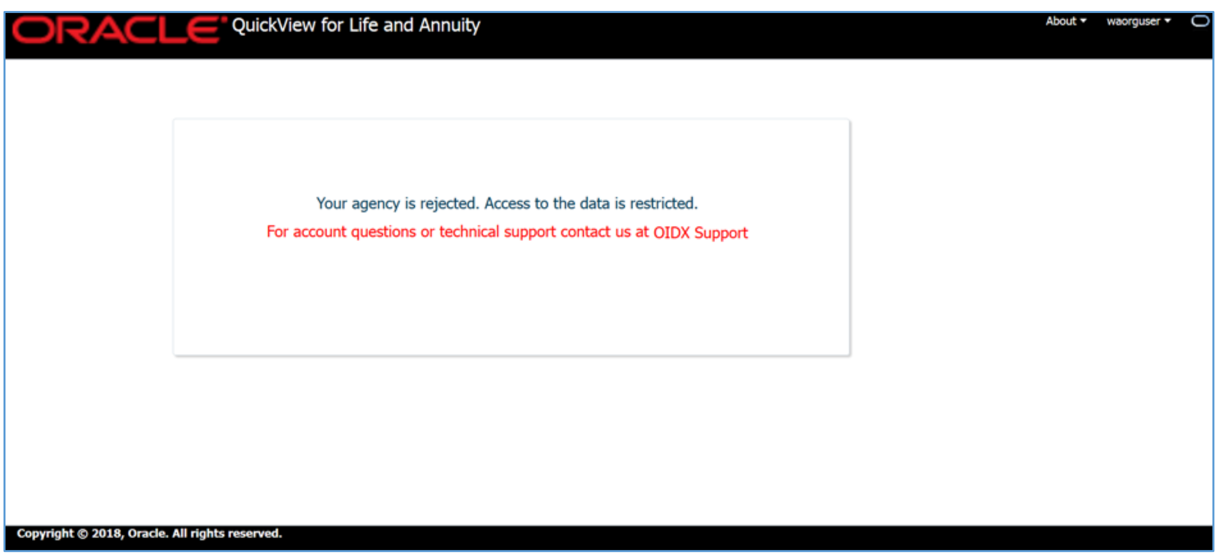


Approved Account Status

Rejected Status

Your QuickView account is rejected if the account details are not validated by administrator. Please update your account details or contact your administrator to activate your account.

In case your account status is 'Rejected', you will see the following message after log in: "Your agency is rejected. Access to the data is restricted"



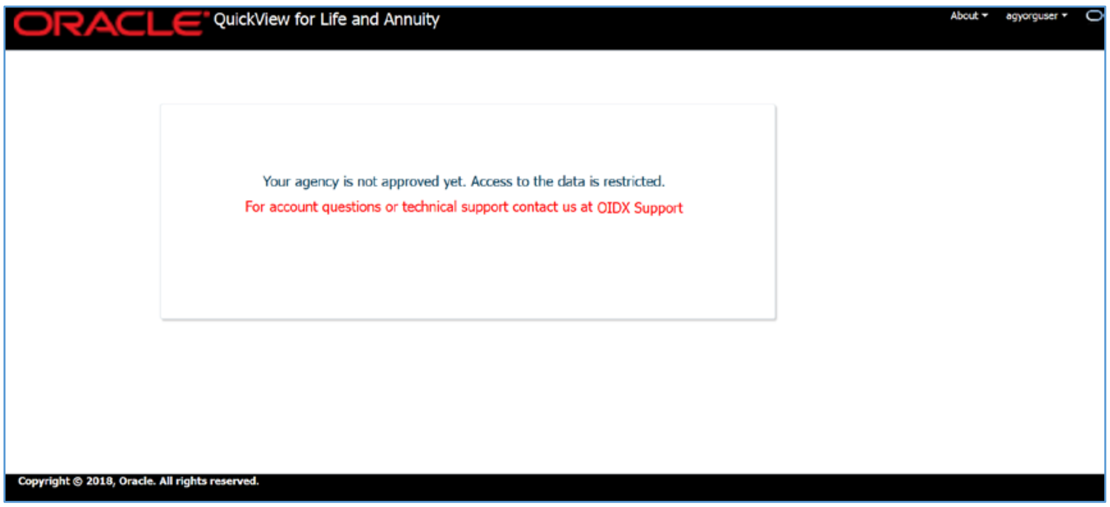
Rejected Account Status

Pending Status

If you have updated your account details within past six months from the date of rejection and administrator is yet to validate, you will see ‘Pending’ status after log in.

Please update your account details again if needed, or contact your administrator for approval. If you fail to update your details within six months from the date of rejection, your account will be set to ‘Not Set’ status by administrator.

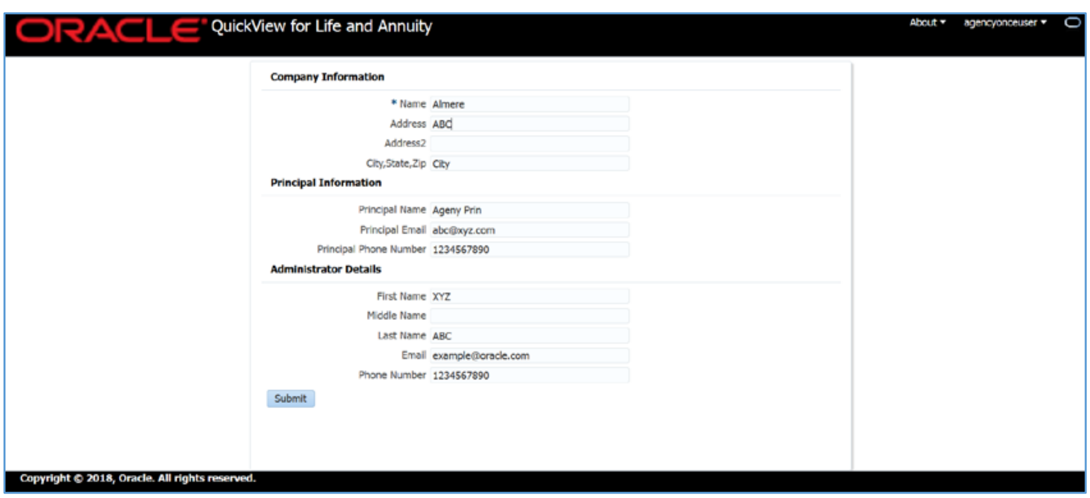
In case your account status is ‘Pending’, you will see the following message after log in:
“Your agency is not approved yet. Access to the data is restricted”



Pending Account Status

Not Set Status

If your account is in pending status and you have not updated your account details in past six or more than six months from the date of rejection, your account is set to ‘Not Set’ status. In this scenario, you will be redirected to re-registration page when you try to access the QuickView.



Agency Re-registration Page

To know more about registration process, see Registering for a QuickView Account.

Section – 1

Carriers

A carrier user is an individual employed by an insurance carrier that serves as the administrator for the carrier.

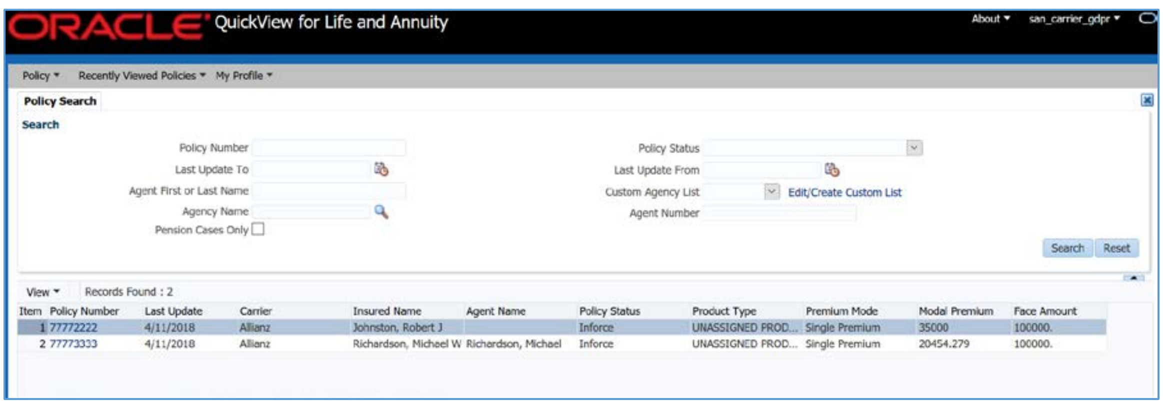
Carrier users have three menu options:

- Policy
- Recently Viewed Policies
- My Profile

Policy

Policy Search

The minimum criteria required to do a search is Carrier selection with the All Carriers option as default. Select others options to filter the information and reduce the amount of entries returned.



Policy search for carrier users

1. To search for a single policy or a group of policies, select **Policy** > **Policy Search** from the top bar menu.

2. In the **Search** area, enter data into one or more fields and click **Search**. The more search fields that are completed, the narrower the search. The available fields include:

Field	Description
Policy Number	Allows you to search for a specific policy. Results returned will match the criteria entered. For example, if you enter three digits, the policies returned will start with those three digits.
Policy Status	To search for policies in a select status, (i.e., All Forms In Approved, Delivered). Multiple statuses can be selected by clicking the status you want and pressing the **CTRL** key.

Last Update Date	Searches for policies updated since this entered date. Policies that were updated on the last update date are also included.
Agent First or Last Name	Enter agent’s first or last name to do a search.
Custom Agency List	A list of specifically selected agencies. You can create multiple lists. Custom agency lists are unique to the current user. For more information see Creating custom agency list.
Insured Name	Search by the first or last name of the insured.
Agent Name	Search by the first or last name of the Agent.
Agent Number	Search by agent number.
Pension Cases Only	Select this option to search for pension cases only.

3. When finished selecting search criteria, click **Search**.

4. Results are returned in the lower portion of the tab.

NOTE	If you are searching policies by several criteria, the search engine looks for all the policies that contains all the criteria selected.

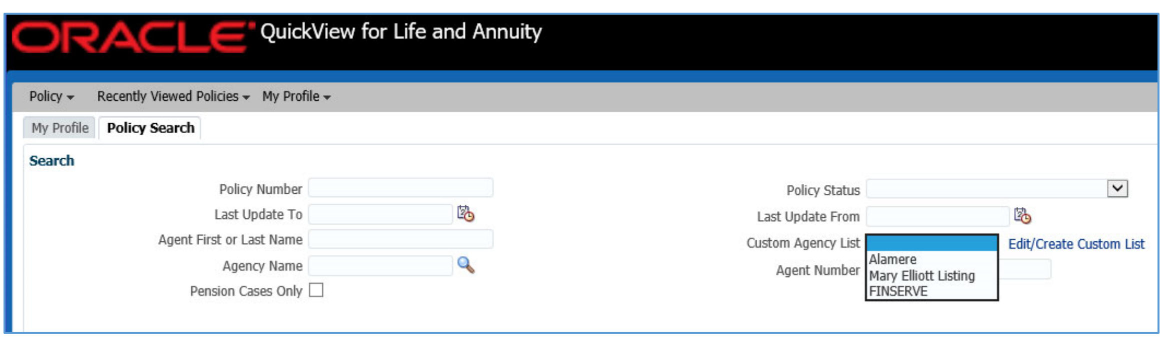
A carrier user is also entitled to search policies based on following filters

- Custom Agency Lists
- Searching for Agencies by Name

Custom Agency Lists

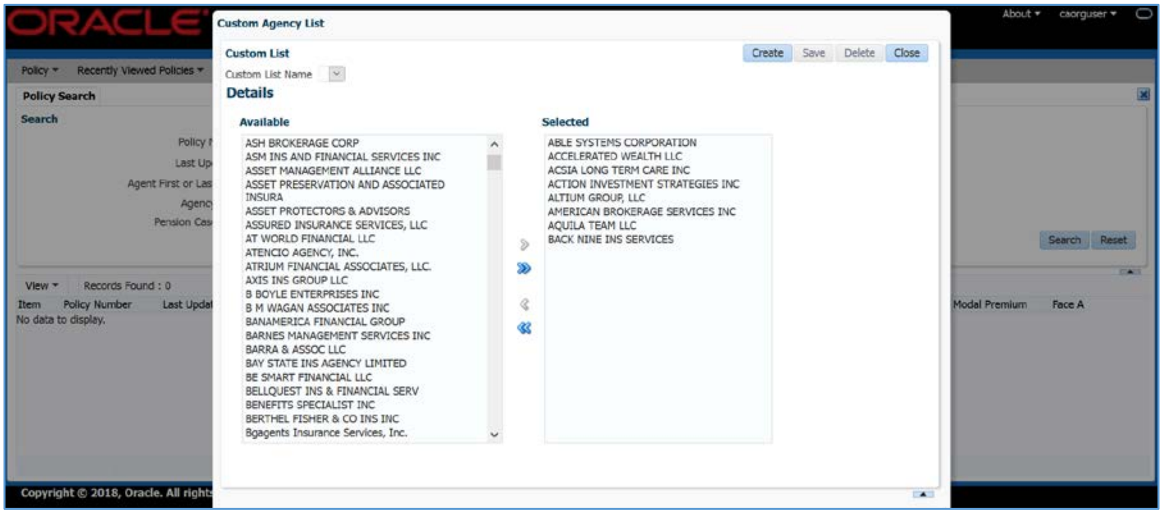
Creating a Custom Agency List

If there are no agency list populating the custom agency drop down, you must create one. Click the Edit/Create Custom List link next to the drop down



Selecting a Custom Agency List

This opens the Custom Agency List.



Creating a Custom Agency List

1. Enter a name for list. Click **Create** to create the list.

2. Select the agencies you want to include on this list from the Available field and move them over to the selected field. Entries can be selected one at a time or in bulk. To select various agencies, select the agency you want and hold the **CTRL** key to continue selecting agencies. To select a range of agencies, select the first agency and hold the **SHIFT** key down. Then, select the last agency in the range.

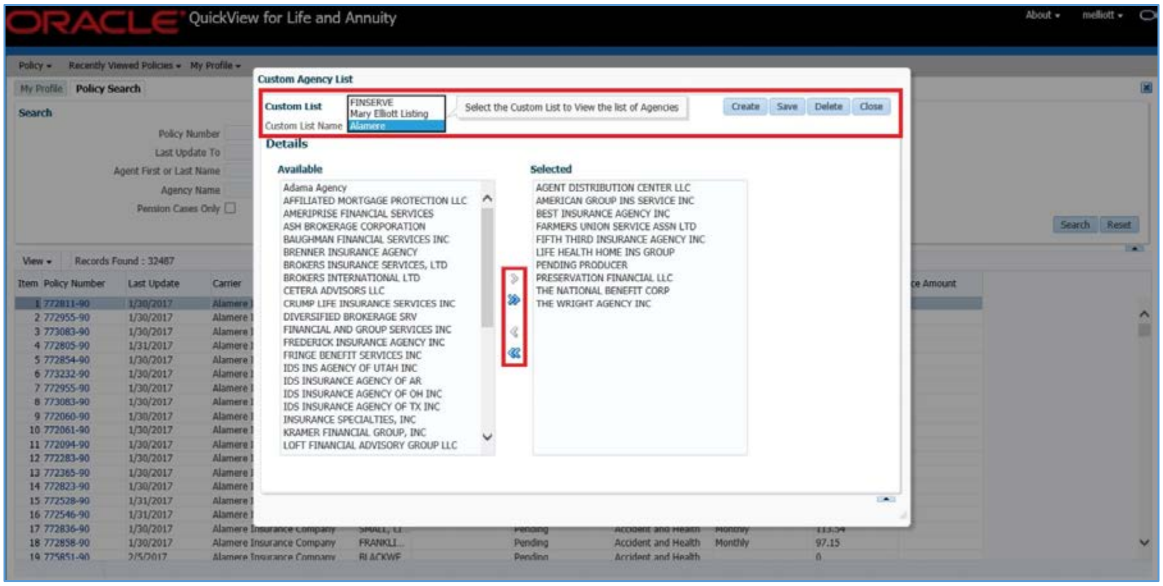
3. When your list is complete, click **Save** to save your entry and close the screen.

If this is not the screen you want, click **Cancel** to close the Custom Agency List screen.

Editing a Custom Agency List

To edit an agency list, click the Edit/Create Custom List link next to the drop down.

This opens the Custom Agency List.



Editing a Custom Agency List

1. Select the list you want to edit from the **Custom List** field.
2. Make your changes.
3. When you are finished, click **Save** to save your entry and close the screen.

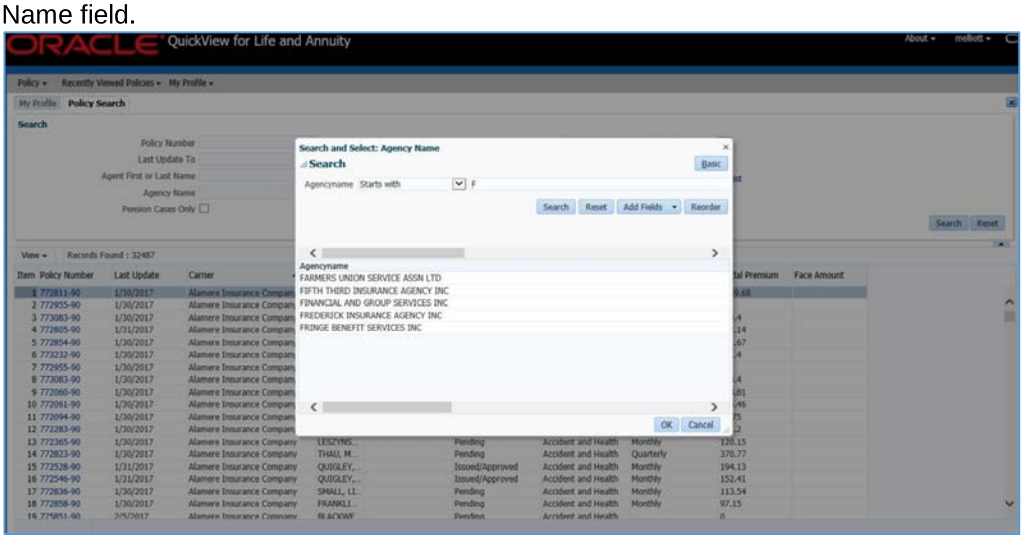
If this is not the screen you want click **Cancel** to close the Custom Agency List screen.

Deleting a Custom Agency List

Use the Edit screen to delete a list. Lists are deleted immediately.

Searching for Agency by Name

Carrier users can search for agencies by clicking the magnifying glass icon next to the Agency Name field.



Searching for Agency by Name

1. To search for an agency, click the magnifying glass icon next to the Agency Name field. A separate screen opens.

2. Select the parameter that you want to search by from the drop down menu. Only one parameter can be selected.

3. Enter the criteria in the field next to the selection. For example, if you wanted to search for an agency that starts with the letter F, you would select “Starts with” as the search parameter and enter the letter “F” in the search criteria field.

4. Results are displayed below the search. Select the agency you want and click OK. Only one agency can be selected at a time.

Policy Search Results

Search results are displayed in the lower portion of the tab. Not all search fields are represented in the results. Not all result fields are search criteria.

- Last Update
- Policy Number
- Carrier
- Policy Status
- Insured
- Modal Premium
- Face Amount

Total record found are listed at the top of the results section along with the View option to reorder the result columns.

Policy Search Results

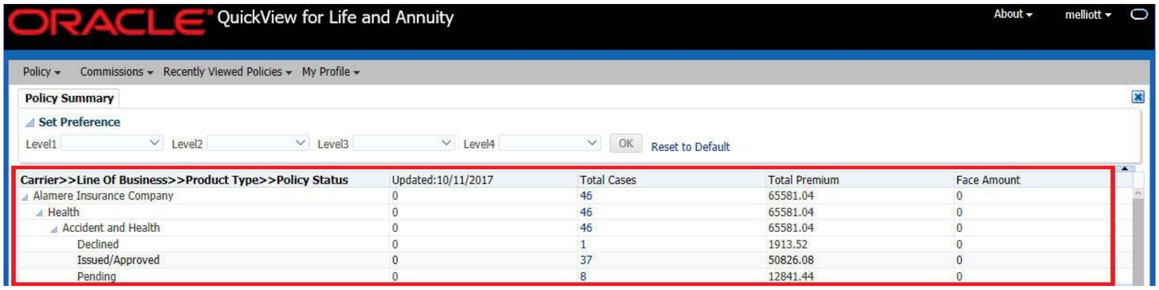
The policy number is a clickable link on the policy search results tab. Click the policy number to open the policy details. For more on policy details please see Policy Details.

Reset Search

Clicking the Reset button to clear the fields and reset the search options.

Policy Summary

The Policy Summary tab displays a summary of all the pending cases from the carriers that you have successfully requested receiving data from grouped by several fields. The default preferences for policy data listing are Carrier>Line of Business>Product Type>Policy Status.



Drill Down Options in Policy Summary Tab

Information in Policies Summary

The Policy Summary tab has five columns:

Column	Description
Preference Selection	The Preference selection column provides drill-down functionality for sorting summary data. Summary data is grouped by default in four categories: **carrier, line of business, product type and policy status**. The preferences listing can be updated to list in a different order.
Total Cases	The total number of cases for the corresponding categories. Click on the total figure to access a list of those cases. You can drill down to the individual policies from the total policy listing.
Updated Since (Date)	Identifies how many cases have been updated in this category since the date indicated in the column heading.
Total Premium	A total premium figure for the corresponding category.
Face Amount	A total face amount for the corresponding category.

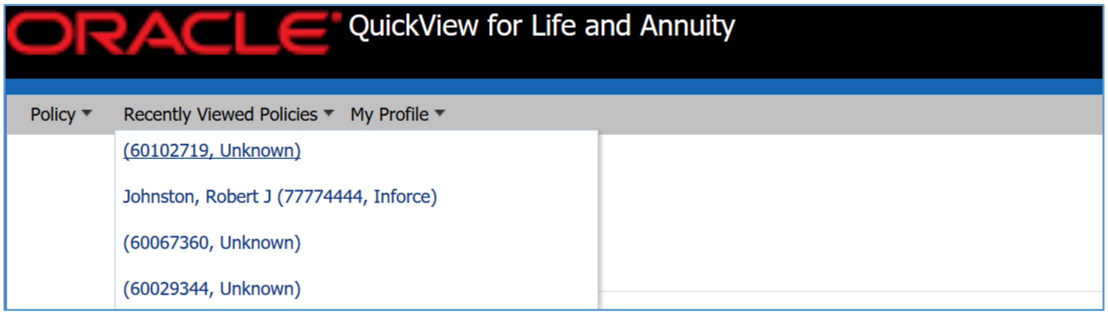
To know more about viewing summary see Summary Tab.

Recently Viewed Policies

Recently Viewed Policies contains a list of the policies that you viewed recently. These are individual policies and not summaries or policy lists.

To view, click the expand arrow and the policies are presented in a list starting with the last policy you viewed. You can return to a policy by clicking it from the list. If the policy is not already open, it will open in a new tab.

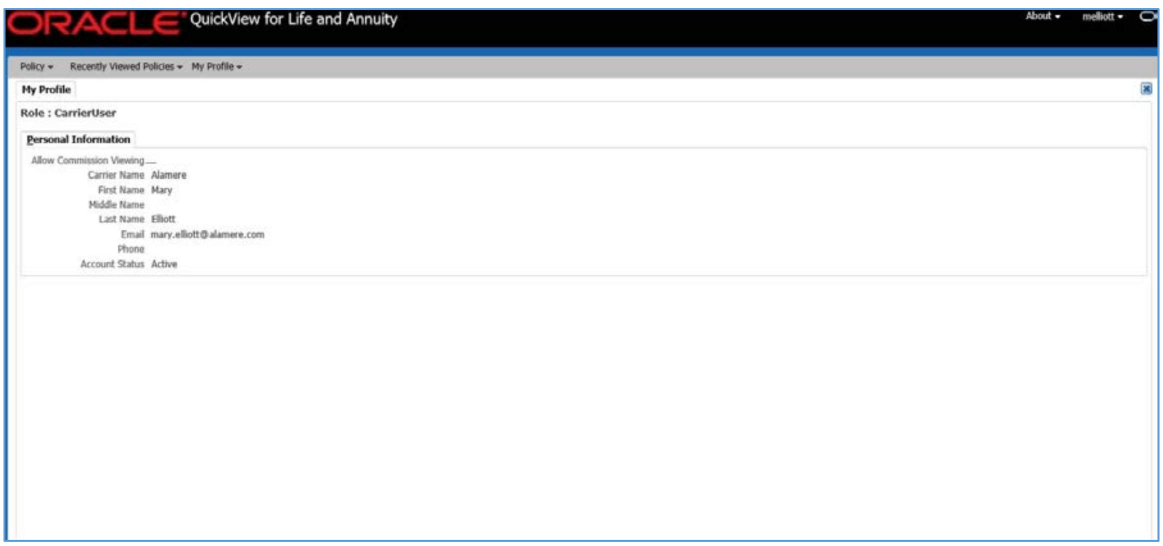
Recently Viewed Policies are for the current instance. When you log out, the list is cleared.



Recently Viewed Policies for carrier users

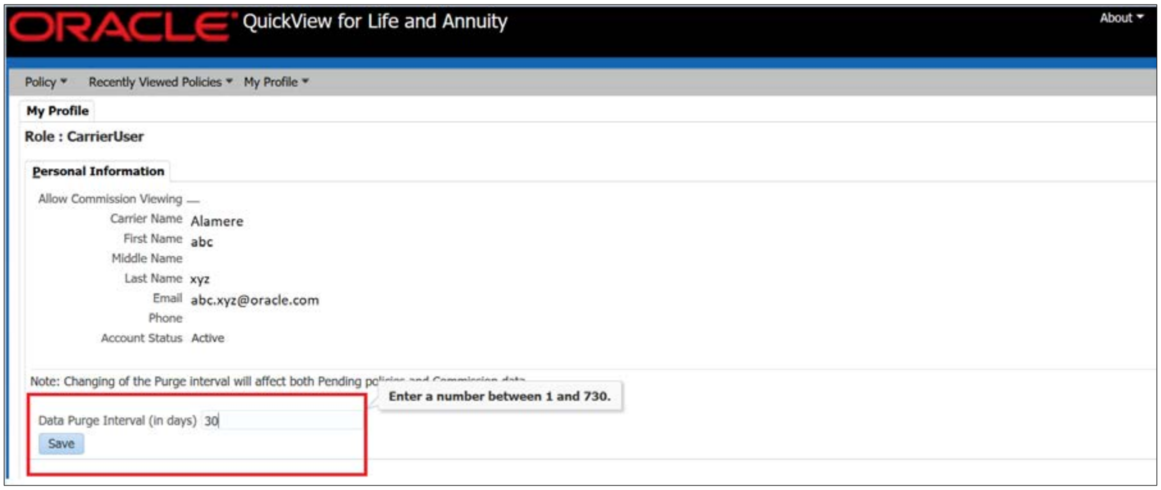
My Profile

A carrier user cannot setup relationships with carriers. Only the personal information for the carrier user is available. Updates to the My Profile information are done in the Oracle Identity Self Service. Please contact your QuickView administrator for this information.



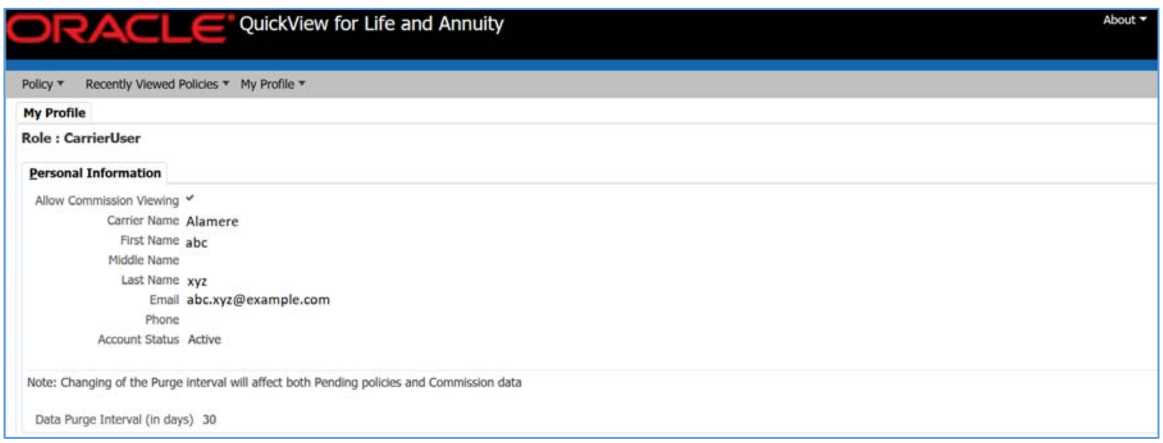
Setting Data Purge Interval

Carrier users with OIDX organization administrator roles are entitled to set data purge interval (in days) using My Profile tab. Enter desired number between 1 and 730 in the **Data Purge Interval** field and click **Save**. The default value is set to 30 days.



Personal information for carrier users with OIDX organization admin role

Carrier users without OIDX organization administrator roles are not entitled to set data purge interval. These types of users can only view data purge interval (in days) as shown below:



Personal information for carrier users without OIDX organization admin role

Section – 2

Agencies and Writing Agents

A general agency is an organization/company that serves as a marketing and support organization for individual life insurance agents.

A writing agent is an individual insurance agent licensed to sell life insurance policies and/or annuities. This account type is also for an agency with more than one employee that does not require a principal contact and an administrator. A writing agent user may have contracts with one or more insurance carrier clients.

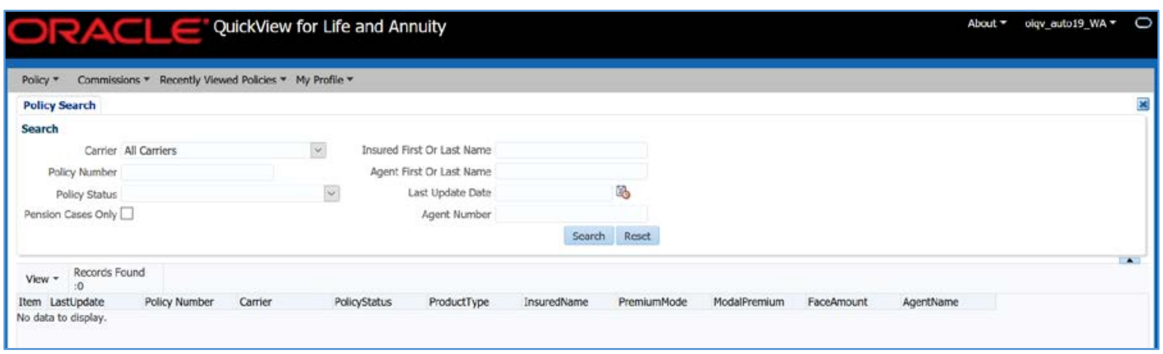
Agency and writing agent users have four menu options:

- Policy
- Commissions (contact your administrator if this option is not active for your account)
- Recently Viewed Policies
- My Profile

Policy

Policy Search

The minimum criteria required to do a search is Carrier selection with the All Carriers option as default. Select others options to filter the information and reduce the amount of entries returned.



Policy search for writing agents and agency users

1. To search for a single policy or a group of policies, select **Policy** > **Policy Search** from the top bar menu.

2. In the **Search** area, enter data into one or more fields and click Search. The more search fields that are completed, the narrower the search. The available fields include:

Field	Description
Carrier	Select a carrier from the drop-down list. This creates a policy list based on the selected carrier. Only one carrier can be selected at a time. The list displays all carriers in the system.

Insured First Or Last Name	Search by the first or last name of the insured.
Policy Number	Allows you to search for a specific policy. Results returned will match the criteria entered. For example, if you enter three digits, the policies returned will start with those three digits.
Agent First or Last Name	Enter agent's first or last name to do a search.
Policy Status	To search for policies in a select status, (i.e., All Forms In Approved, Delivered). Multiple statuses can be selected by clicking the status you want and pressing the CTRL key.
Last Update Date	Searches for policies updated since this entered date. Policies that were updated on the last update date are also included.
Pension Cases Only	Select this option to search for pension cases only.
Agent Number	Search by agent number.

3. When finished selecting search criteria, click **Search**.

4. Results are returned in the lower portion of the tab.

NOTE	If you are searching policies by several criteria, the search engine looks for all the policies that contains all the criteria selected.

Policy Search Results

Search results are displayed in the lower portion of the tab. Not all search fields are represented in the results. Not all result fields are search criteria.

- Last Update
- Policy Number
- Carrier
- Policy Status
- Insured
- Modal Premium
- Face Amount

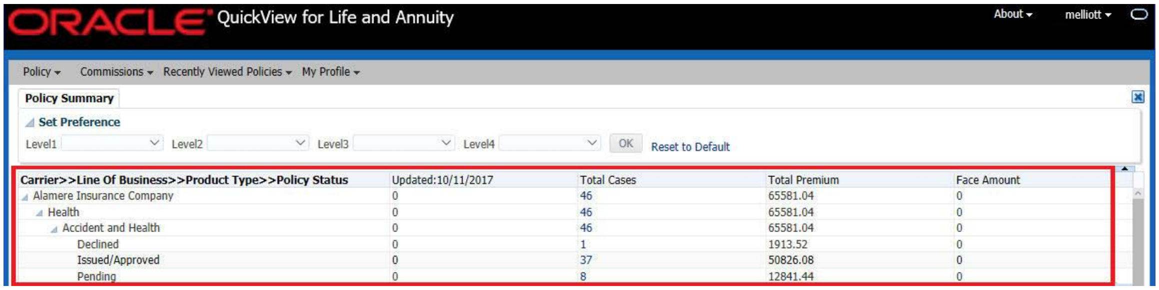
Total record found are listed at the top of the results section along with the View option to reorder the result columns.

Policy Details

The policy number is a clickable link on the policy search results tab. Click the policy number to open the policy details. For more information on policy details, please see Policy Details.

Policy Summary

The Policy Summary tab displays a summary of all the pending cases from the carriers that you have successfully requested receiving data from grouped by several fields. The default preferences for policy data listing are Carrier > Line of Business > Product Type > Policy Status.



Drill Down Options in Policy Summary Tab

Information in Policies Summary

The Policy Summary tab has five columns:

Column	Description
Preference Selection	The Preference selection column provides drill-down functionality for sorting summary data. Summary data is grouped by default in four categories: **carrier, line of business, product type and policy status**. The preferences listing can be updated to list in a different order.
Total Cases	The total number of cases for the corresponding categories. Click on the total figure to access a list of those cases. You can drill down to the individual policies from the total policy listing.
Updated Since (Date)	Identifies how many cases have been updated in this category since the date indicated in the column heading.
Total Premium	A total premium figure for the corresponding category.
Face Amount	A total face amount for the corresponding category.

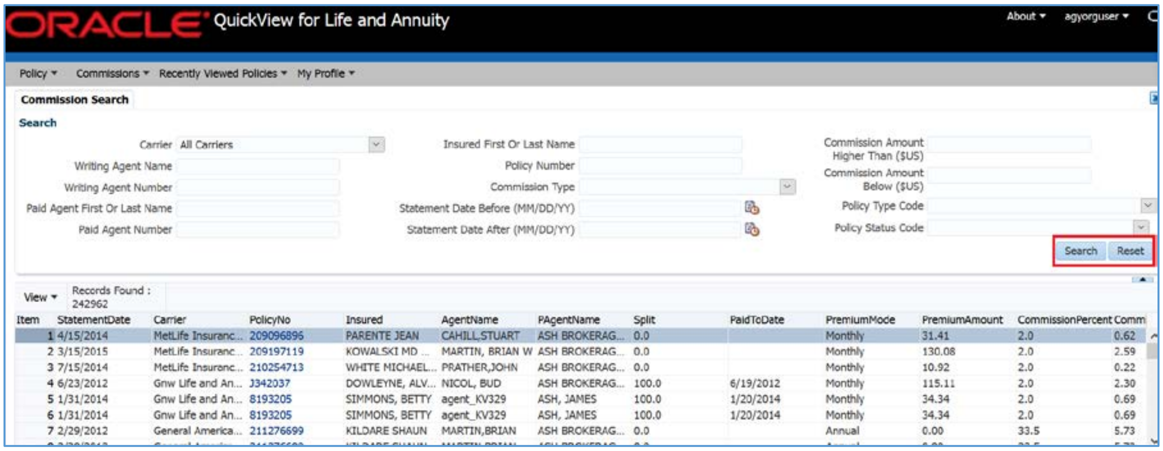
To know more about viewing summary see Summary Tab.

Commission

Commission Search

The minimum criteria required to do a search is Carrier selection with the All Carriers option as default. Select others options to filter the information and reduce the amount of entries returned.

ORACLE
Insurance



Commission Search Tab

1. To search for a single policy or a group of policies, select **Policy** > **Policy Search** from the top bar menu

2. In the **Search** area, enter data into one or more fields and click Search. The more search fields that are completed, the narrower the search. The available fields include:

Field	Description
Carriers	Select a carrier from the drop-down list. This creates a policy list based on the selected carrier. Only one carrier can be selected at a time. The list displays all carriers in the system.
Writing Agent Name	Search by the name of the writing agent.
Writing Agent Number	Search by the writing agent number.
Insured Name	Search by the first or last name of the insured.
Policy Number	Allows you to search for a specific policy. Results returned will match the criteria entered. For example, if you enter three digits, the policies returned will start with those three digits.
Statement Date After	Searches for statements after the entered date. Statements that were created on this date are also included. Use this field and the Statement Date Before to set a "Statement Date" range for finding commissions. For example, if today is 1/4/18 and you would like to see a list of all commissions within the last month, you would enter 12/4/17 in the **After** field and 1/4/18 in the **Before** field.

Statement Date Before	Searches for statements before the entered date. Statements that were created on this date are also included. Use this field and the Statement Date After to set a "Statement Date" range for finding commissions. For example, if today is 1/4/18 and you would like to see a list of all commissions within the last month, you would enter 12/4/17 in the **After** field and 1/4/18 in the **Before** field.
Commission Type	Search for statements with a specific commission type. Multiple types can be selected by clicking the type you want and pressing the **CTRL** key.
Commission Amount **Higher Than (US$)**	Search for statement where the commission amount is higher than the value entered. Use this field and the Commission Amount Below to set a "Commission" range.
Commission Amount **Below (US$)**	Search for statement where the commission amount is below the value entered. Use this field and the Commission Amount Higher Than to set a "Commission" range.
Policy Type Code	Search by specific policy type codes. Multiple types can be selected by clicking the type you want and pressing the **CTRL** key.
Policy Status Code	To search for policies in a select status, (i.e., All Forms In Approved, Delivered). Multiple statuses can be selected by clicking the status you want and pressing the **CTRL** key.

3. When finished selecting search criteria, click **Search**.

4. Results are returned in the lower portion of the tab.

NOTE	If you are searching commissions by several criteria, the search engine will look for all the commissions that contain all the criteria you selected.

Commission Search Result Details

Search results are displayed in the lower portion of the tab. Not all search fields are represented in the results. Not all result fields are search criteria.

- Statement Date
- Carrier
- Policy Number
- Insured
- Writing Agent

- Paid Agent
- Split
- Paid To Date
- Premium Mode
- Premium Amount
- Commission Percent
- Commission Amount

Total record found are listed at the top of the results section along with the View option to reorder the result columns.

Commission Search Results Policy Details

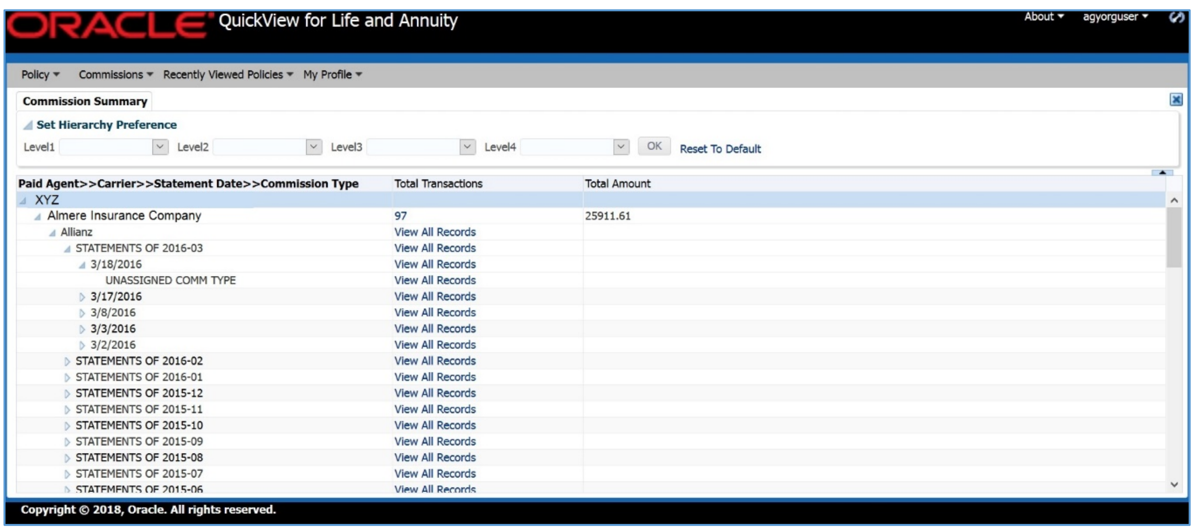
The policy number is a clickable link on the commission search results tab. Click the policy number to open the policy details. For more information on commission details, please see Policy Details.

Reset Search

Click **Reset** to clear the fields and reset the search options.

Commission Summary

The Commission Summary tab displays commission records of all the pending cases from the carriers that you have successfully requested receiving data from grouped by several fields. The default preferences are Paid Agent > Carrier > Statement Date > Commission Type.



Commission Summary Tab

Information in Commissions Summary

The Commissions Summary tab has three columns:

Column	Description
Preferences Selection	The Preferences Selection provides drill down functionality for sorting commission. Commission summary data is grouped by default in four categories: **Paid Agent, Carrier, Statement Date and Commission**

	Type.
Total Transactions	Either a numeric entry or a View All Records link. Clicking the link opens a Policy listing where individual policies can be viewed.
Total Amount	A total commission amount.

Recently Viewed Policies

Recently Viewed Policies contains a list of the policies that you viewed recently. These are individual policies and not summaries or policy lists.

To view, click the expand arrow and the policies are presented in a list starting with the last policy you viewed. You can return to a policy by clicking it from the list. If the policy is not already open, it will open in a new tab.

Recently Viewed Policies are for the current instance. When you log out, the list is cleared.

Recently Viewed Policies for writing agents users

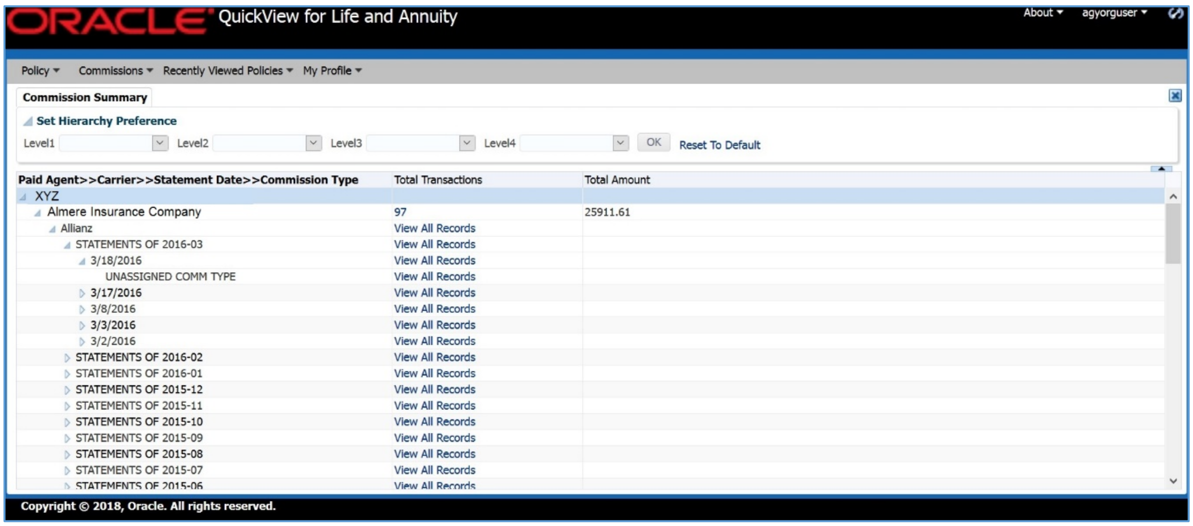
My Profile

Writing agents and Agency users can set up relationship with carriers and view their personal information under the ‘My Profile’ menu. For more information on setting up carrier see [Carrier Setup].

Section – 3

Summary Tabs

There are two summary tabs: Policy and Commissions. The summary tab provides a summary view of policy or commissions data as broken down by category. Summary tabs also contain totals. Click on totals links to access a listing of the policies included or view an individual policy.



Commission Summary Tab

NOTE	Commissions are displayed for those users with permissions.

Updating Preference

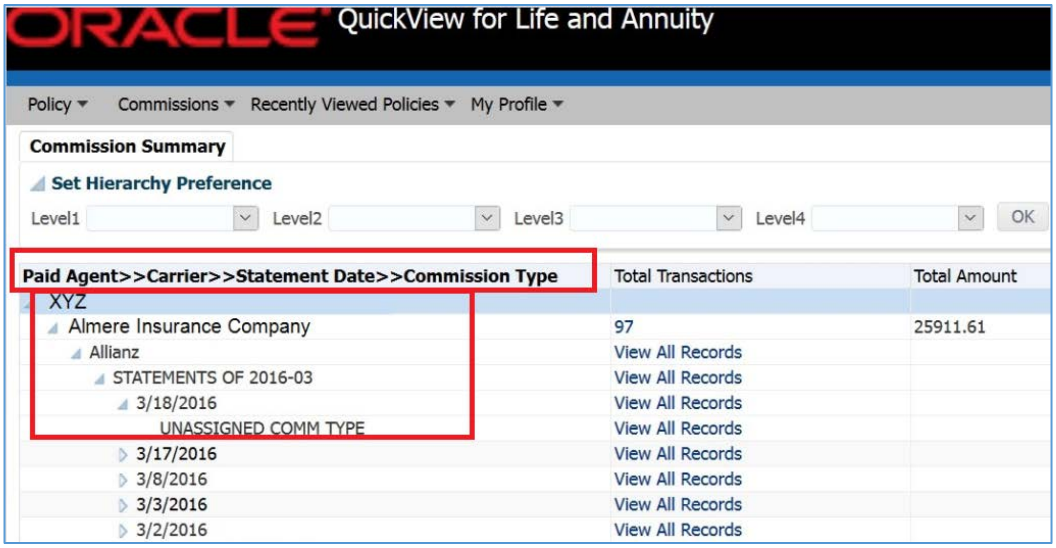
The Select Preferences area sets the category filtering for the summary information. If no changes are made, the default category filtering is used. For example, the default category filtering for a Commission Summary is: Paid Agent > Carrier > Statement Date > Commission Type. Updates can be made to change the way category filtering is done.

To update the category filtering, selecting the category you want as Level 1, Level 2, Level 3, and Level 4 and click OK. All levels must be selected. When the levels are updated, the summary information is re-listed in the order of the updated selections.

To return to the default listing, click **Reset to Default**.

Updated preferences are for the current instance only. Logging out returns the settings to the default.

The current summary preferences are shown in the top bar of the summary area. Preferences can be updated at any time.



Updating Select Preferences for Commissions

Expanding Data in Summary

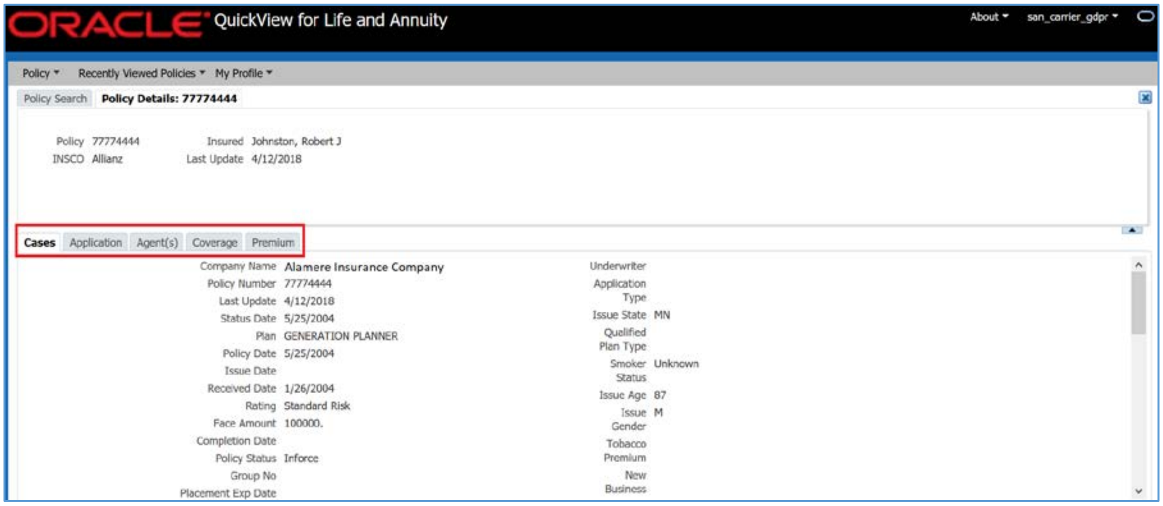
Entries in the summary report can be expanded. The first level of entries contains policy information for all categories. The next level, filters by the level 2 category, the next level by the third category and the final level by the level 4 category. The categories are set in the select preferences area. If you have not selected anything, the default filter list is used.

If there is drill down information available on an entry, an expandable icon will be at the beginning of the entry. Click the icon to see the information below. No icon at the front indicates the last level of category filtering.

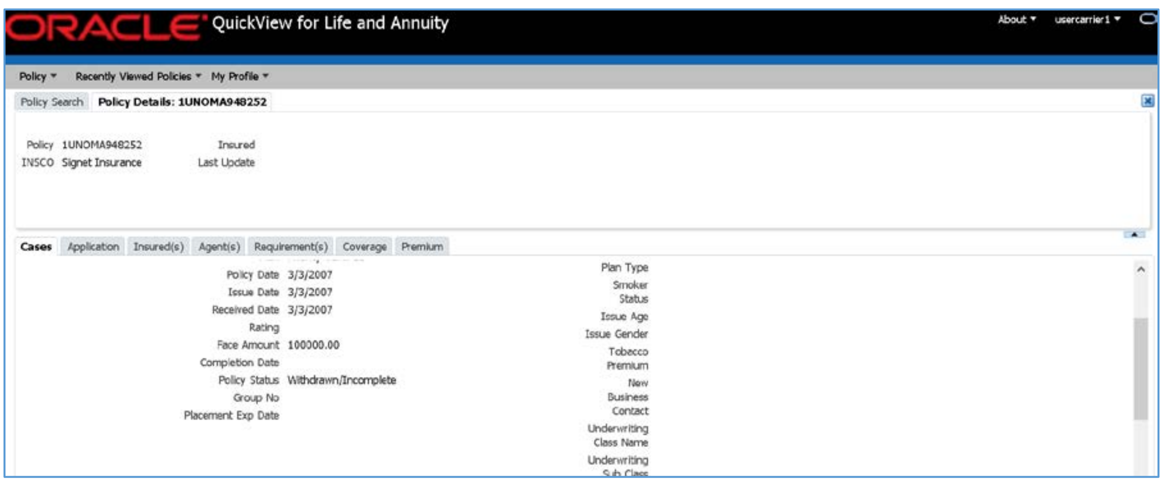
Totals are updated as levels are expanded. To see the policies included in the entry, click the record total number or the View All Records link at the end of the entry. This opens a separate tab with a policy listing for the policies in the entry.

Policy Details

Individual case data is found on the Policy Details tab. The top of the Policy Details tab contains the insurance company, policy number, insured name and last updated date for the case.



Policy Details Tab



Policy Details Tab for users with 'OIDXSensitiveDataViewer' role

The lower portion contains a series of subtabs with additional policy information. Click the tab you want to view the information.

Case Tab

Contains general case data.

- Company
- Policy Number
- Last Update

- Status Date
- Plan
- Policy Date
- Issue Date
- Received Date
- Rating
- Face Amount
- Completion Date
- Policy Status
- Group No
- Placement Exp. Date
- Underwriter
- Application Type
- Issue State
- Qualified Plan Type
- Smoker Status
- Issue Age
- Issue Gender
- Tobacco Premium
- New Business Contact
- Underwriting Class Name
- Underwriting Sub-class
- Target Premium Amount
- Formal Application
- Messages

Application Tab

Contains details about the application, such as submission type and dates.

- Tracking ID
- Application Signed Date
- Submission Type
- Submission Date
- Applied for Jurisdiction
- CWA Amount
- Agent CWA Date
- HO CWA Date
- HO Receipt Date
- Carrier Input Date
- HO Policy Mailed Date
- Policy Delivery Receipt Date

Insured(s) Tab

Contains information regarding the insured attached to the case. This tab is accessible for only users with 'OIDXSensitiveDataViewer ' role.

- Name
- Life
- SSN
- DOB
- Age

- Gender
- Tobacco Premium

Agent(s) Tab

Lists the agents attached to the case.

- Name
- Num
- Agent No
- Split

Requirements(s) Tab

Identifies option types. This tab is accessible for only users with 'OIDXSensitiveDataViewer ' role.

- Requirement
- Standard Requirement
- Insured Name
- Requested Date
- Status Date
- Received Date
- Status
- Short Name
- Comments

Coverage Tab

Contains coverage information.

- Plan
- Effective Date
- Face Amount
- Application Type
- Qualified Plan Type
- Perm Table Rating
- Perm Flat Extra Amount
- Temp Table Rating
- Temp Rating End Date
- Temp Flat Extra Amount
- Temp Flat End Date
- Death Benefit Amount
- Term Date

Premium Tab

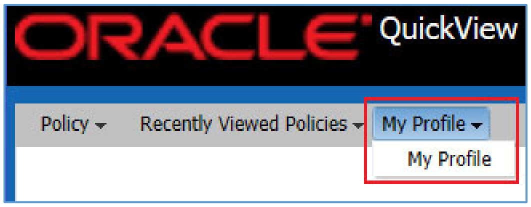
Specific details about the premium.

- Modal Premium
- Annualized Premium
- Premium Balance Due
- Premium Balance Due Sign
- Payment Mode

- Payment Method
- Billed To Date
- Paid To Date
- Policy Fee
- Gross Payments
- Loan Balance
- Loan Interest Rate
- Loan Repay Mode
- Loan Repay Amount
- Value Effective Date
- Cash Value
- Surrender Value
- Dividend Type
- Dividend Option
- Last Dividend
- Next Dividend
- Dividends One Year Termination Date

My Profile

The My Profile link in the top bar menu contains a link to the My Profile Tab.



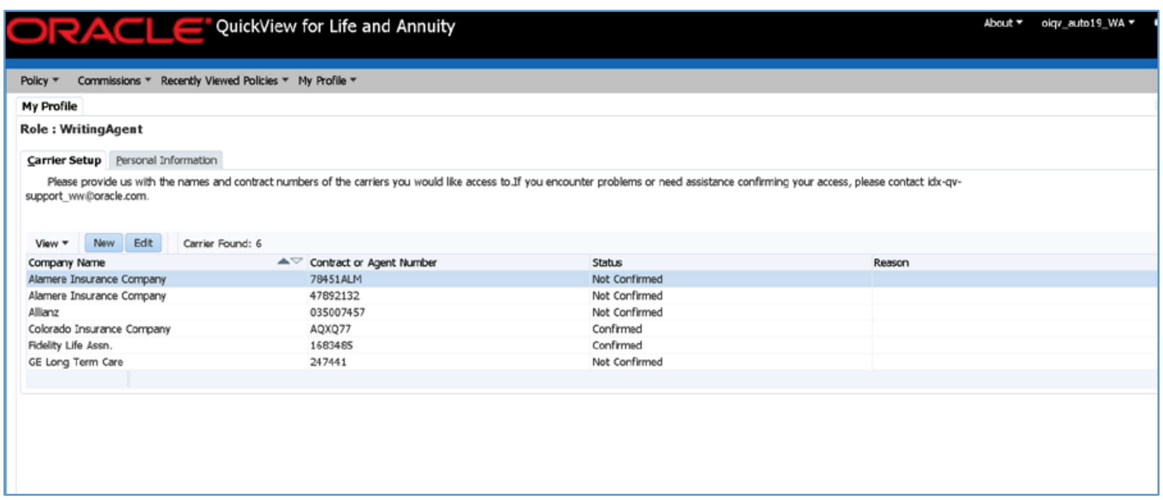
My Profile Drop Down Menu

On the My Profile tab, there are following subtabs:

- **Carrier Setup – accessible to writing agents and agency users**
- **Personal Information – accessible to all types of users**

Carrier Setup

Carrier Setup is where you enter the details of the contracts you have with specific carriers. Once a contract relationship has been created, edits to selected fields can be done.



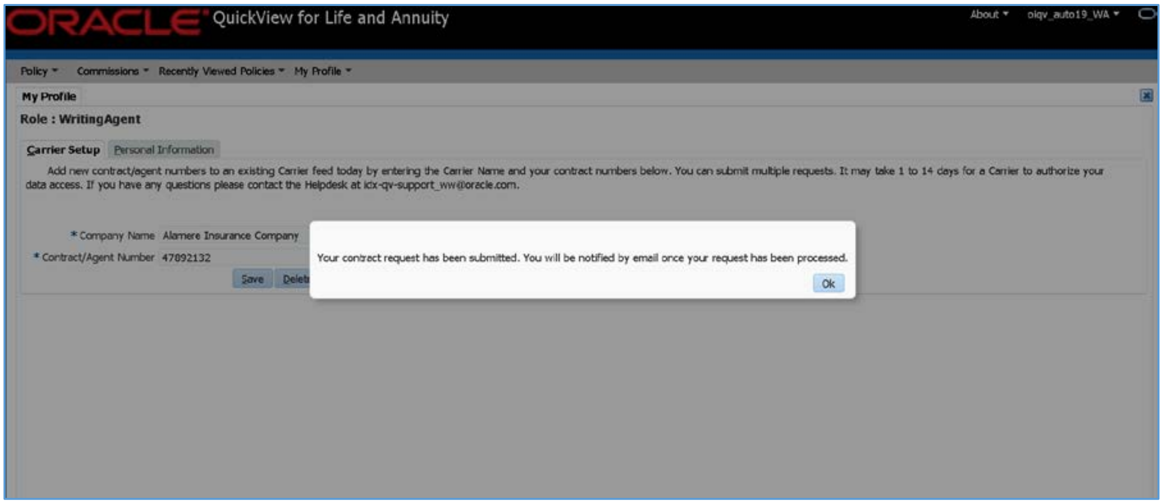
Carrier Setup

Adding a Contract

1. On the Carrier Setup subtab, click New.
2. Select the carrier where you want to create a contract request from the drop down menu.
3. Enter the Contract/Agent Number. Multiple contracts can be entered by listing all Contracts or Agent Numbers separated by commas.

4. Click Save. A message is displayed stating that your contract request has been submitted. You will be notified by email once your request has been processed.

5. Click **OK** to close the message.



Success Message for Creating Carrier Contract Request

You must enter contracts for each carrier. You can enter as many requests as you need.

Contract Validation Process

The contract validation process is a multiple step process. The process begins when the agent or the agency submits a contract request. Contracts are validated against data that is supplied by the carrier. Requests are compared to make sure the agent has the correct carrier and contract information. The request is granted if the request matches with the carrier data.

If there are discrepancies, the point of contact or administrator for the agency/agent will be contacted.

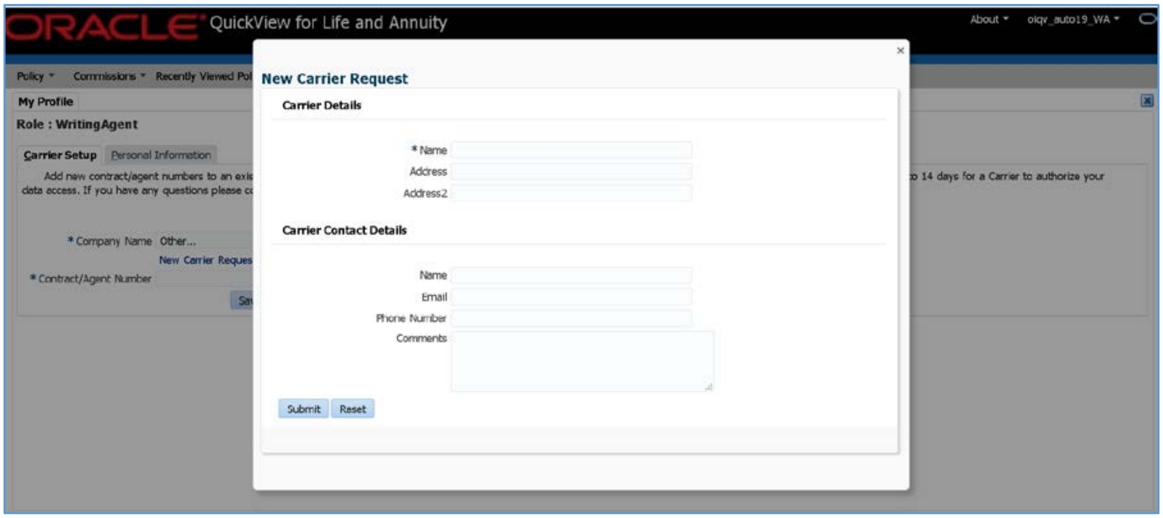
Please allow 24 business hours for a reply.

IMPORTANT: *Your request will be send to QuickView for processing with the carrier. Once you are activated to receive this carrier's data, you will receive an email from QuickView confirming your "active" status. You only will be able to see pending cases from your Confirmed contracts.*

New Carrier Request

In the event that the carrier you want is not listed, you can enter a request to add a carrier.

1. From the Carrier Setup subtab, select Other for Company Name.
2. Click **New Carrier Request**.



New Carrier Request

3. Enter Carrier details, Name, and Address.
4. Enter Carrier contact details. Name, email, phone number.
5. Enter any comments to assist with your request.
6. Click **Submit**. Your request is sent to QuickView for processing.

A message is displayed stating that your carrier request has been submitted. You will be notified by email once your request has been processed.

Deleting a Carrier

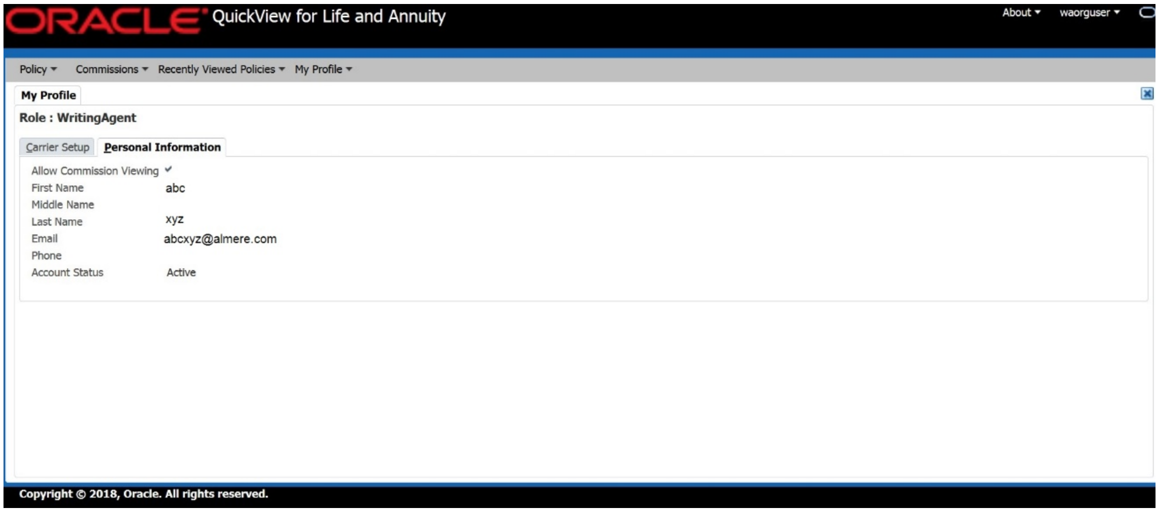
Carriers where you no longer have a relationship use can be deleted. .

NOTE	Removing a confirmed contract removes the ability to see any pending cases related to that contract.

1. On the Carrier Setup subtab, click **Edit**. This opens the carrier request screen.
2. Select the carrier that you want to remove.
3. Enter the Contract/Agent Number.
4. Click **Delete**. This removes the relationship.

Personal Information

Your profile information is the information used to create your account in to QuickView. You can access your user profile from the top bar menu. The personal information cannot be changed.



Personal Information View Only

SUPPORT

If you receive an error or need a question answered, please contact Oracle Insurance Data Exchange Support by sending an e-mail to oidxsupport_grp@oracle.com.

Address any additional inquiries to:

Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Worldwide Inquiries:
Phone: +1.650.506.7000
Fax: +1.650.506.7200
oracle.com

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