**PBI#715 – Auto Processing the FAV, LOB changes**

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| Basic Info: | | | | |
| Application(s) | wmA | | User Story | As a death claims processor, for all partial death claims, I need to have the ADB or EDB Rider Terminated, the death benefit indicator changed to V-Account Value, the FAV code changed to the lowest FAV code available, and the LOB indicator changed to the LOB that signifies V-Account Value automatically when I process a partial death claim. |
| Use Case Description | This use case addresses auto processing the:  1) The FAV Code change  2) Rider Termination  3) Death Benefit Indicator  4) the LOB change | | | |
| Primary User(s) | Death Claim processors | | Secondary User(s) | Adjustment Processors |
| Relationships | **Refers to:** | LOB Indicator Update PBI779  Auto Process the Value adjustment PBI712 | | |
| **Referred from:** |  | | |

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| Conditions | | | [Top](#_top) |
| Client Stories  **And**  **User Actions** | 1. As a processor I need the following to automatically occur when processing a partial death claim: 2. Change FAV Code to the lowest value number available. 3. Terminate the rider on the Administration Transaction on the Admin Tab, update death benefit indicator and LOB to the option that equates to V-Account Value, and have other criteria, detailed in the ‘New Functionality’ section completed. | | |
| Pre-conditions | Contract has to exist in wmA  Contract must be in either A-Active or E – Death Pending status | | |
| Post-conditions | Success | Auto spawned transactions process as needed. | |
| Failure | Auto spawned transactions do not process as expected | |

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{In the case of one or two page flow charts you can copy and paste the chart directly (it can be edited by double clicking), for larger charts insert the file as an object}

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| Special Requirements | | [Top](#_top) |
| Requirement Number | Description | | |
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| Functional Changes | | [Top](#_top) |
| New Functionality | 1. wmA will change the FAV Code with the following criteria: 2. Update FAV code on the FAV Code Transaction on the Admin Tab 3. FAV is always changed to the lowest value available number 4. wmA will terminate the rider on the Administration Transaction on the Admin Tab, update death benefit indicator and LOB to the option that equates to V-Account Value and: 5. Change the Additional Death Benefit Indicator to T – ADB was terminated 6. If field says N – No ADB or T – ADB was terminated on the contract, no change is necessary 7. Change death benefit indicator field to V-Account Value 8. LOB codes start with Zero 9. The LOB change should leave the last character the same. (i.e. If the LOB code was 204, the new LOB code would be 004) 10. wmA shall not display the ‘Reverse’ or ‘Send to Rev Err’ checkboxes for any child transactions generated by this PBI’s process. | | |

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| Nice to Have\*\*Items in this section are not required for acceptance. If implemented they will be deleted from this section and integrated with the rest of the use case. At the end of the sprint items not implemented will be left in this section but also added to the backlog for possible future implementation. | | | [Top](#_top) |
| Item | Information | Owner | | |
|  |  | {Name} | | |

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|  | Auto processing the FAV and LOB changes happens regardless if a auto-processed VA was spawned. | Alicia & Alex | | |
|  | If the FAV and LOB are set to the lowest possible values, neither value will change. | Alicia & Alex | | |
|  | Living benefit riders, such as GMIB, are not in scope for this use case. | Alex Lange | | |
|  | The ADB and EDB will be terminated on the contract. (Added due to Ambiguity 6556 and 7334 discussions). Reference notes 7 & 8. | Alex Lange | | |
|  | Specific changes will not be required for products with automated FAV change transactions. | Alex Lange | | |
|  | Both the LOB’s starting with ‘0\*\*’ and DB Indicator ‘V’ will be added to for the NEF franchise. | Alex Lange | | |
|  | If DB Indicator is changed to any value apart from 'Y', 'W', 'X', 'C' and at same time DBR Version is not SDB the DBR Version field is made space by the system.  In that case one more change transaction is processed along with DB Indicator change transaction. In our example since we are changing DB Ind to 'V', the DBR Version will become space, if the current DBR version is not SDB. | Arnob Das | | |
|  | So, any current DB Ind (except V itself) will be changed to 'V'. So, death benefit amount will be calculated based on Account value not on ROP, Interval Step Up, ODB or others. | Arnob Das | | |
|  | Both the MSLS and FIA products will change to Death Benefit Indicator ‘I – Interim Value’ rather than ‘V – Account Value’. Additionally, the first byte of the MSLS/FIA LOB will be ‘I’ instead of 0. | Alex Lange | | |
|  | As of 7/19/16 wmA has alerted me that the VA and any other child transaction will not be displaying the reversal and send to revolving error checkboxes once they have deployed new code. Functional requirement 3 has been added. | Alex Lange | | |
|  | If a MSLS or FIA product (always true for FIA) has a DB Ind of ‘I’ then a LoB change won’t be necessary. | Alex Lange | | |
|  | FIA, being an indexed product, only has a FAV code of 000000, making a FAV change impossible. | Alex Lange | | |

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**Screen Layout:**