
Allow Clients to control Product Type for UI filtering
(iConnect 223609)

FIRELIGHT BASE

FireLight[®]

Platform

**ALLOW CLIENTS TO CONTROL PRODUCT TYPE FOR UI FILTERING (ICONNECT
223609)**

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Insurance Technologies, LLC

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iConnect 223609 Design Approach - Allow Clients to control Product Type for UI filtering (iConnect 223609)

End users are having a hard time finding products in FireLight because of duplicate and out of date product type defined in FireLight. Distribution has asked that product types be consolidated to assist users in finding product.

Some of the subdivisions are necessary for number of different reasons:

- Back Office Processing
- Workflow Management
- Reporting
- Etc.

These are valid reasons for some of the different product types and the functionality supported by these types must be maintained. However, these reasons are not pertinent to the end user of the platform and it inhibits ease of use when it comes to finding the product that they are looking for.

The purpose of this enhancement is to provide a method of filtering product that makes life easier for the end user without interrupting existing back office processes.

1 Allow Carriers to Define Product Type where their products appear in UI filtering

End users are having a hard time finding products in FireLight because of duplicate and out of date product type defined in FireLight. Distribution has asked that product types be consolidated to assist users in finding product.

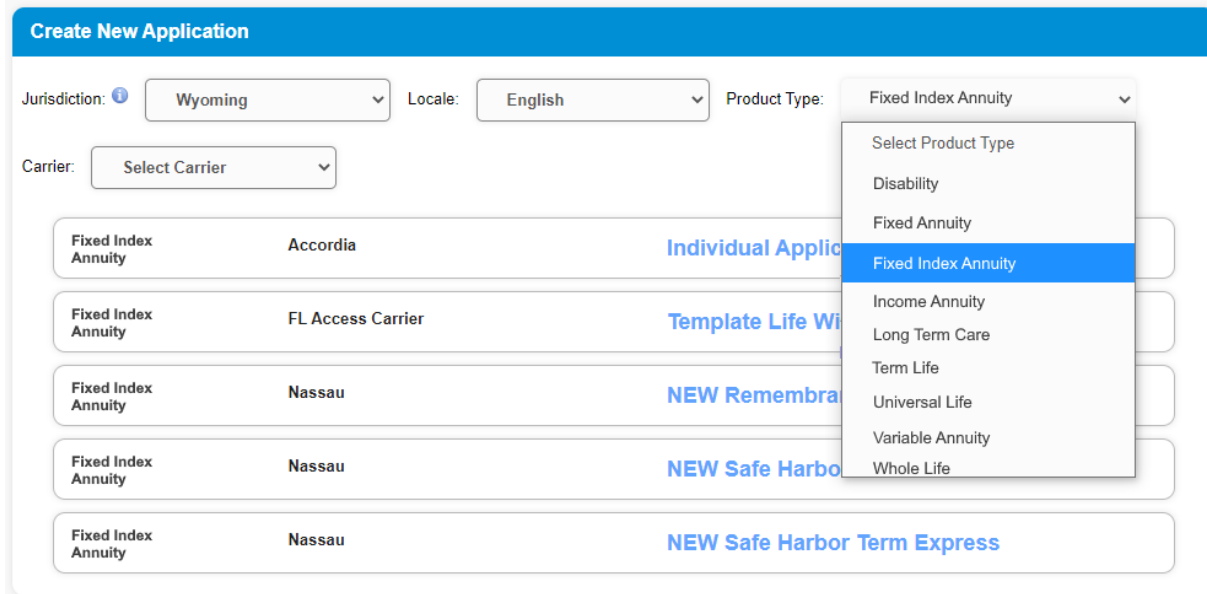
Some of the subdivisions are necessary for number of different reasons:

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- Reporting
- Etc.

These are valid reasons for some of the different product types and the functionality supported by these types must be maintained. However, these reasons are not pertinent to the end user of the platform and it inhibits ease of use when it comes to finding the product that they are looking for.

The purpose of this enhancement is to provide a method of filtering product that makes life easier for the end user without interrupting existing back office processes.

This enhancement will allow carriers to define the product type under which their product appears in the new activity dialog.



Create New Application

Jurisdiction: Wyoming Locale: English Product Type: Fixed Index Annuity

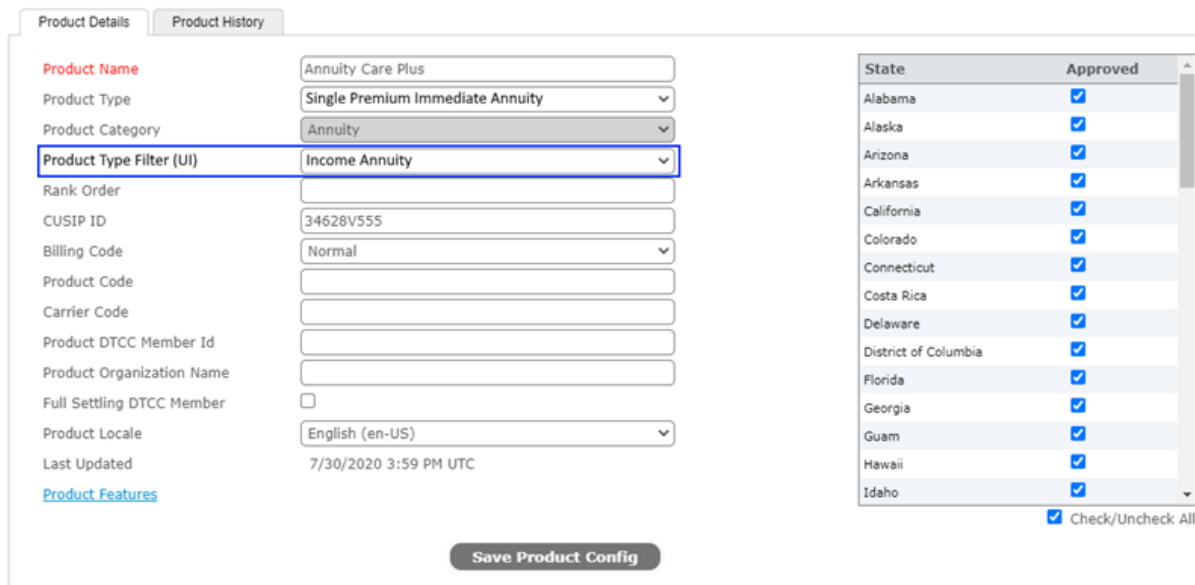
Carrier: Select Carrier

Fixed Index Annuity	Accordia	Individual Application
Fixed Index Annuity	FL Access Carrier	Template Life With
Fixed Index Annuity	Nassau	NEW Remembrance
Fixed Index Annuity	Nassau	NEW Safe Harbor
Fixed Index Annuity	Nassau	NEW Safe Harbor Term Express

Product Type dropdown options:

- Select Product Type
- Disability
- Fixed Annuity
- Fixed Index Annuity**
- Income Annuity
- Long Term Care
- Term Life
- Universal Life
- Variable Annuity
- Whole Life

The product type filters will be defined through a new dropdown selection on the Product Details tab.



Product Details | Product History

Product Name: Annuity Care Plus

Product Type: Single Premium Immediate Annuity

Product Category: Annuity

Product Type Filter (UI): Income Annuity

Rank Order:

CUSIP ID: 34628V555

Billing Code: Normal

Product Code:

Carrier Code:

Product DTCC Member Id:

Product Organization Name:

Full Settling DTCC Member: ☐

Product Locale: English (en-US)

Last Updated: 7/30/2020 3:59 PM UTC

[Product Features](#)

Save Product Config

State	Approved
Alabama	<input checked="" type="checkbox"/>
Alaska	<input checked="" type="checkbox"/>
Arizona	<input checked="" type="checkbox"/>
Arkansas	<input checked="" type="checkbox"/>
California	<input checked="" type="checkbox"/>
Colorado	<input checked="" type="checkbox"/>
Connecticut	<input checked="" type="checkbox"/>
Costa Rica	<input checked="" type="checkbox"/>
Delaware	<input checked="" type="checkbox"/>
District of Columbia	<input checked="" type="checkbox"/>
Florida	<input checked="" type="checkbox"/>
Georgia	<input checked="" type="checkbox"/>
Guam	<input checked="" type="checkbox"/>
Hawaii	<input checked="" type="checkbox"/>
Idaho	<input checked="" type="checkbox"/>

☒ Check/Uncheck All

The value in that field is set using an enumeration `ProductTypeGroup`. The string descriptions for each enum value can be set using the attribute. These descriptions can also be localized and even overridden per org.

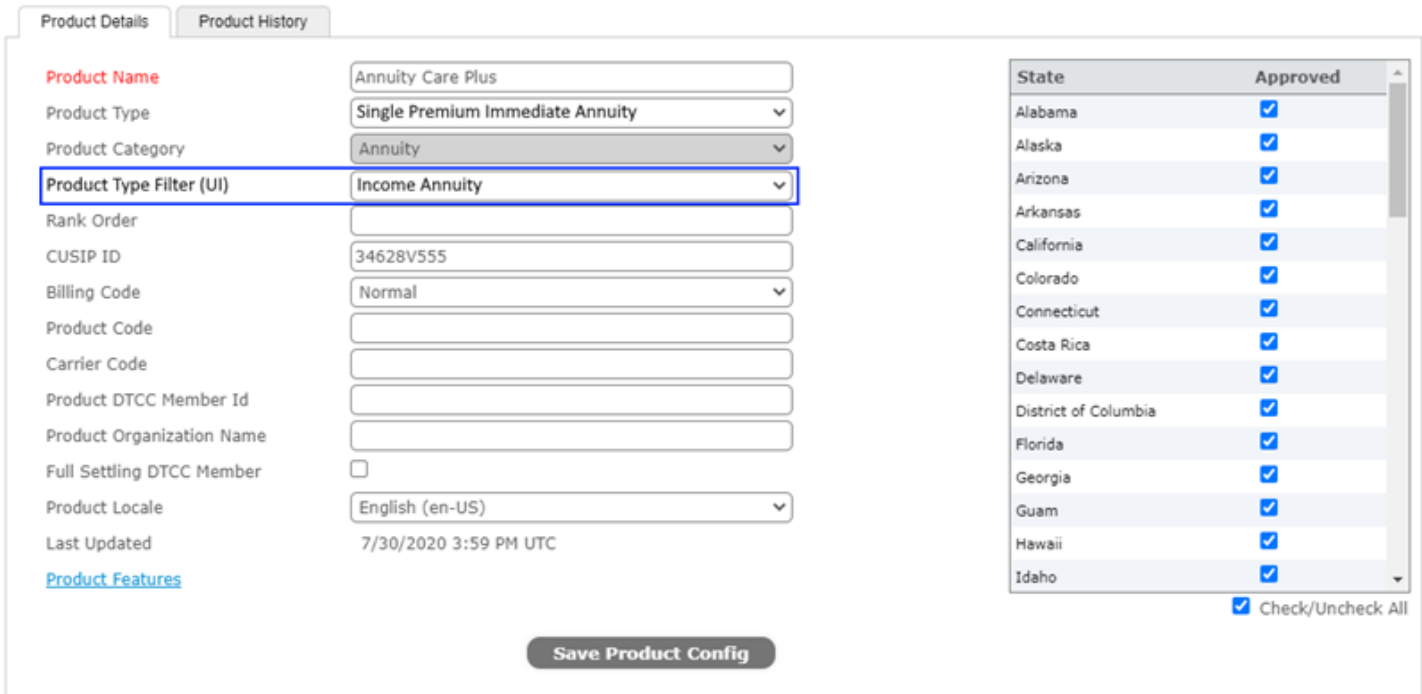
```
public enum ProductTypeGroup
{
    [Description("Fixed Annuity")]
    FixedAnnuity = 1,
    ...
}
```

Acceptance Criteria

- The new drop down selection list appears below "Product Category" and above "Rank Order"
- The label for the new drop down list is "Product Type Filter (UI)"

1.1 Admin: Add "Product Type Filter (UI)" Drop-down List

Under "Product Category" and prior to "Rank Order" on the Product Details tab, add a new drop-down in the FireLight admin tool labeled "Product Type Filter (UI)".



State	Approved
Alabama	<input checked="" type="checkbox"/>
Alaska	<input checked="" type="checkbox"/>
Arizona	<input checked="" type="checkbox"/>
Arkansas	<input checked="" type="checkbox"/>
California	<input checked="" type="checkbox"/>
Colorado	<input checked="" type="checkbox"/>
Connecticut	<input checked="" type="checkbox"/>
Costa Rica	<input checked="" type="checkbox"/>
Delaware	<input checked="" type="checkbox"/>
District of Columbia	<input checked="" type="checkbox"/>
Florida	<input checked="" type="checkbox"/>
Georgia	<input checked="" type="checkbox"/>
Guam	<input checked="" type="checkbox"/>
Hawaii	<input checked="" type="checkbox"/>
Idaho	<input checked="" type="checkbox"/>

☒ Check/Uncheck All

The functionality of the dropdown will be as follows:

- For the initial release, the dropdown will contain all of the same product types as presented in the Product Type dropdown above.
 - Again, for the initial release, the "Product Type Filter (UI)" selection will be set to the same option selected in the Product Type dropdown. This is being done to keep the same behavior as is currently presented to users and to avoid changes not intended by the organization admin.
 - In subsequent releases, options may be removed from the dropdown as part of the cleanup process
- When setting up a product, the selection for "Product Type Filter (UI)" will determine under which filter selection the product will appear.
- Add a new product type filter of "Income Annuity"
 - This option is intended for use with "Deferred Income Annuity", "Immediate Annuity", and "Single Premium Immediate Annuity".
- The selection of Product Type Filter will define visibility when filtering product types in the new activity dialog and will have no other effect. Selections will be saved. All current functionality

associated with "Product Type" will remain unchanged with the exception of product filtering on the new activity page.

Selections and changes must be tracked in Product History

Product Details		Product History		
Action	Old Value	New Value	Action Date	Login
Accumulation Product Saved and Updated			8/5/2020 10:58:05 AM	Katherine_FLADEMO
Accumulation Product Saved and Updated			8/5/2020 10:57:59 AM	Katherine_FLADEMO

Create New Application

Jurisdiction: Wyoming Locale: English Product Type: Fixed Index Annuity

Carrier: Select Carrier

Fixed Index Annuity	Accordia	Individual Application
Fixed Index Annuity	FL Access Carrier	Template Life With
Fixed Index Annuity	Nassau	NEW Remembrance
Fixed Index Annuity	Nassau	NEW Safe Harbor
Fixed Index Annuity	Nassau	NEW Safe Harbor Term Express

Select Product Type

Disability

Fixed Annuity

Fixed Index Annuity

Income Annuity

Long Term Care

Term Life

Universal Life

Variable Annuity

Whole Life

The objective of this implementation is to allow for consolidation of products under a subset of product types in an effort to make products easier to find. The proposed consolidation is shown below. This consolidation is not mandatory. If a carrier chooses not to adopt the preferred Product Type Filter, their products will continue to be seen as they are currently.

Preferred	Current
Fixed Annuity	Fixed Annuity Multi-Year Guaranteed Annuity Traditional Fixed Annuity
Fixed Index Annuity	Equity Indexed Annuity Fixed Index Annuity Fixed Indexed Annuity
Income Annuity (<i>New Product Type to FL</i>)	Deferred Income Annuity Immediate Annuity Single Premium Immediate Annuity
Variable Annuity	Registered Index Linked Annuity Variable Annuity

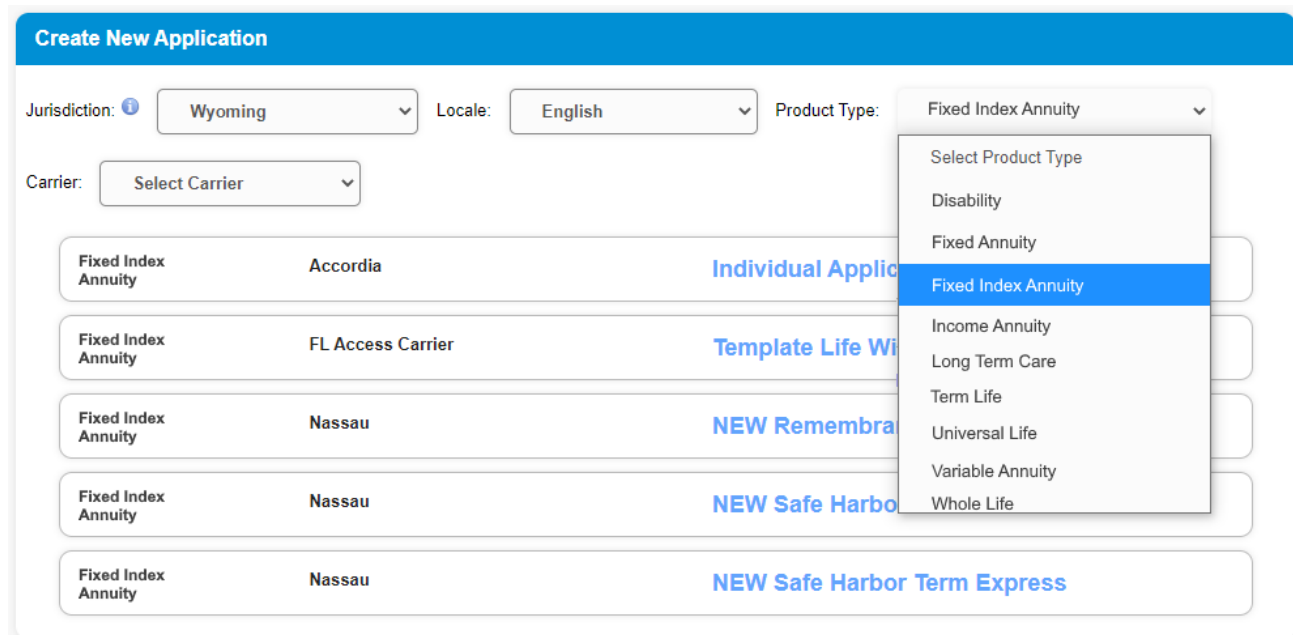
*Discontinue use of generic product type of "Annuity"

Acceptance Criteria

- The new drop down selection list appears below "Product Category" and above "Rank Order"
- The label for the new drop down list is "Product Type Filter (UI)"
- The drop down list is identical to the "Product Type" list with one exception. a new option of "Income Annuity" is added.
- For existing products, when this functionality is added to the platform the "Product Type Filter (UI)" field will automatically be set to match "Product Type"
- Selection is Saved
- Selection/Changes are saved/tracked in Product History

1.2 Application: Present Selection of Product Type Filter selection in User Interface

The contents of the "Product Type" drop down on the Create New Application dialog will be driven by the "Product Type Filter (UI)" selection made on the Product Details tab in the admin. This is a change from the current functionality of driving the "Product Type " drop down in the application based on the "Product Type" selection in the admin.



The screenshot shows the 'Create New Application' dialog. At the top, there are fields for 'Jurisdiction' (Wyoming), 'Locale' (English), and 'Product Type' (Fixed Index Annuity). Below these is a 'Carrier' dropdown (Select Carrier). The main area displays a list of application templates, each with a 'Fixed Index Annuity' product type and a carrier name (Accordia, FL Access Carrier, Nassau). A dropdown menu is open for the 'Product Type' field, showing a list of options: Select Product Type, Disability, Fixed Annuity, Fixed Index Annuity (highlighted), Income Annuity, Long Term Care, Term Life, Universal Life, Variable Annuity, and Whole Life.

Acceptance Criteria

- If a product is available to a user, then that product will appear in the Create New Application page based on the "Product Type Filter (UI)" selection for that product in the Admin tool rather than being based on the "Product Type" in the admin.
- There is no other change to the functionality of this page.