



Distributor to Carrier Mapping Guide

firelight

DISTRIBUTOR TO CARRIER MAPPING GUIDE

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Hexure

Two South Cascade Avenue
Colorado Springs, CO 80903

Phone: 719.442.6400

Internet E-Mail: info@hexure.com

Website: hexure.com

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1 Distributor to Carrier Mappings

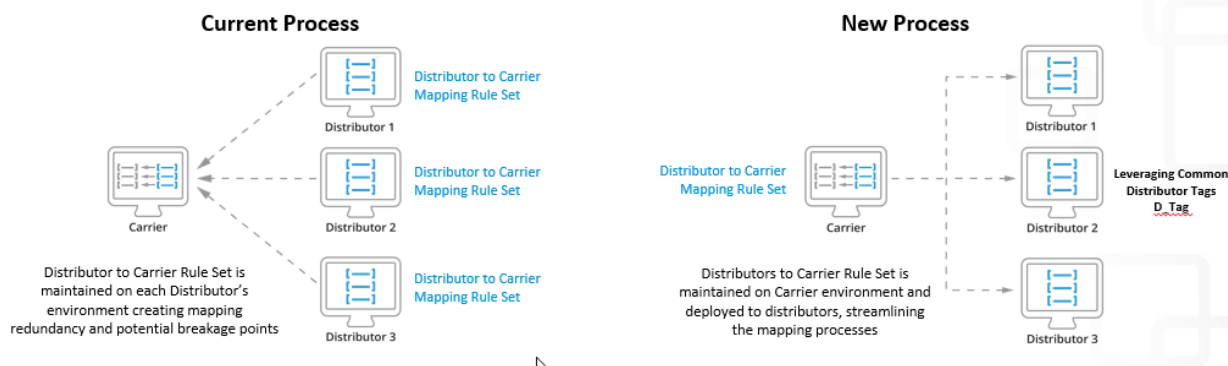
Insurance Technologies is improving the way we implement Distributor to Carrier Mapping for speed and elimination of redundant mapping. The master Distributor to Carrier Rule Set and a Master Mapping Form will now live and be maintained in the carrier environment and deployed to distributor environments. Insurance Technologies team is creating and testing the initial Master Mapping RuleSet with the Master Mapping Form for each carrier at no cost to the carriers. All new distributor implementations will be using this same process with custom distributor values in a distributor RuleSet.

The benefits to adding the Distributor to Carrier ruleset are:

- One RuleSet to set up and maintain
- Reuse of RuleSet via deployment for all new distributors
- Eliminates redundant mapping per distributor
- One spot for breakage, increasing speed for corrections
- Eliminates the need for a distributor implementation to map to carrier forms
- Quicker distributor implementations
- Maintenance of mapping is greatly reduced
- Carriers can deploy updates to distributors on their own
- No cost to the carrier to implement the initial Distributor to Carrier Mapping

New and Improved Process

Distributor to Carrier Mapping will now reside in the carrier package and deployed to distributors.



2 Common Tags

All new clients should be using the common tags and list values that are loaded into the Admin Help. This allows for more efficiency during the development timeframe.

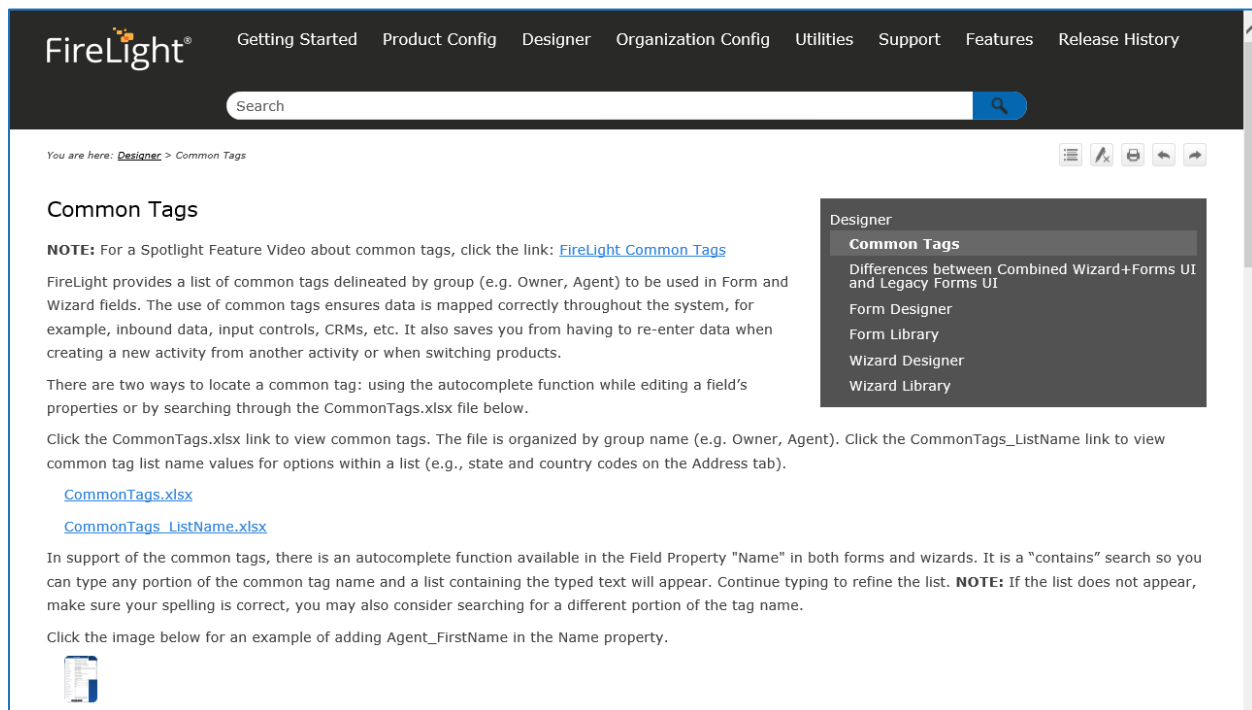
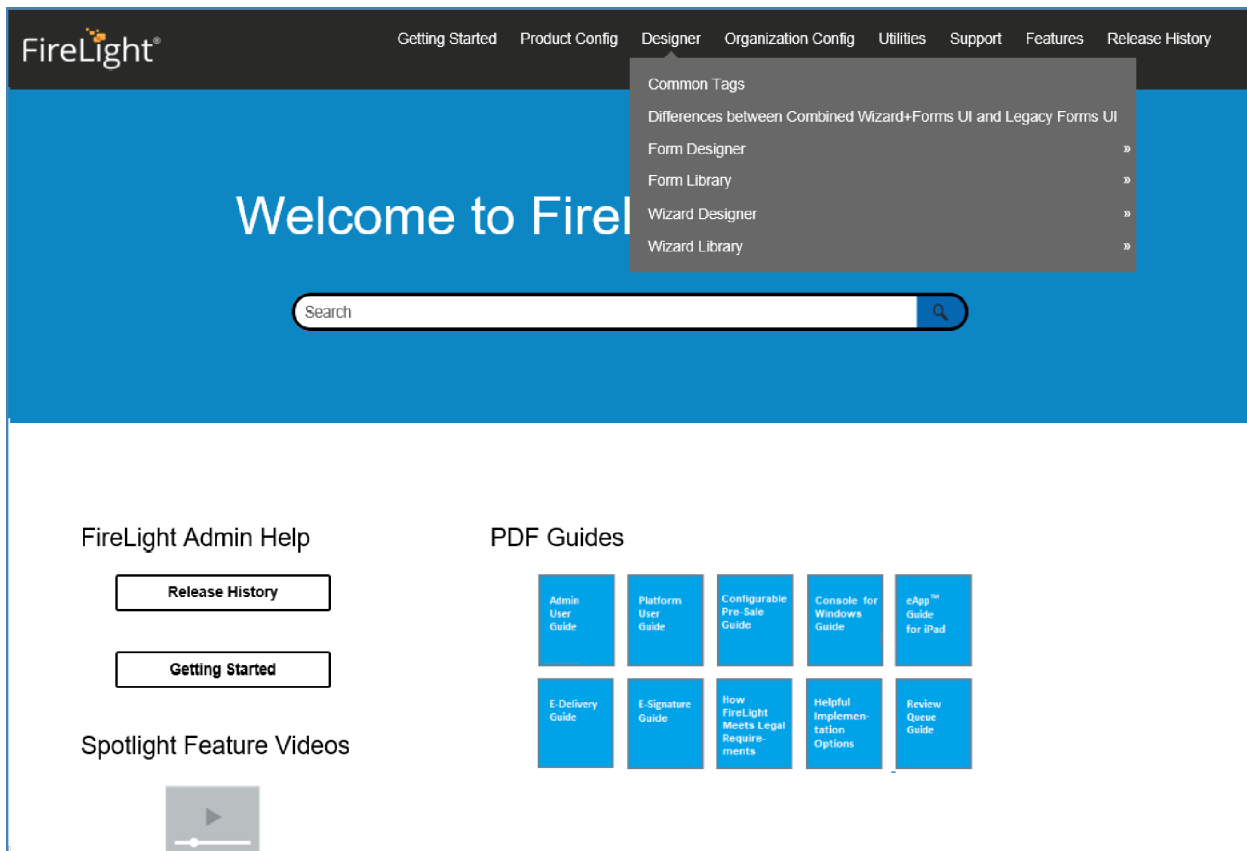
See also the following Spotlight videos about Common Tags, which is also available from the Admin Help.

- Common Tags: <https://vimeo.com/333372962/a2b1765093>
- Common Tag Conversion Process:
<https://vimeo.com/353873388/cce4001558>

NOTE: To find the common tag spreadsheets, refer to the “Common Tags” topic within the FireLight Admin Help. This can be found under the Help button.

The screenshot shows the FireLight Admin Help Designer interface. The top navigation bar includes 'Home', 'Product Config', 'Designer', 'Organization Config', 'Utilities', 'Support', 'Help', and 'Log'. The 'Help' button is highlighted with a yellow box and a mouse cursor. The main workspace displays the 'New York Index Annuity Insurance Authorization Form' for Chase Insurance Agency, Inc. The form is divided into two sections: '1. Primary Contract Owner (or annuitant if trust)' and '2. Joint Contract Owner'. Each section contains fields for citizenship status, name, social security number, date of birth, gender, marital status, primary identification type, identification number, issue date, expiration date, state/country, and legal/residential address. The left sidebar shows 'View in Library', 'Save', 'Form Properties', 'Form History', 'Input Control', and 'Add Control to Form'.

On the Admin Help dashboard, click the **Designer** tab, then select **Common Tags**.



On the Common Tags page, two hyperlink options are available which show all of the allowed common tags and list profiles that are associated with the common tags.

- CommonTags.xlsx hyperlink opens a Microsoft Excel spreadsheet with all common tags that FireLight uses throughout the system. The spreadsheet contains all common tags and is broken out by FireLight Base, Illustration, Annuity, Life, and roles in the tabs at the bottom of the spreadsheet.

CommonTagGroup	CommonTag	ACORDMapping	ListName	Description
Owner	Owner_TaxRate			Primary owner tax bracket
Owner	Owner_TaxRate_DurationType		List_DurationType	Tax bracket duration type which can
Owner	Owner_TaxRate_StartDuration			Tax bracket starting duration which
Owner	Owner_TaxRate_NumberOfYears			Tax bracket number of years which
Owner	Owner_Type		List_OwnerType	Primary owner type used in an activi
Owner	Owner_NonNaturalName	/TXLife/TXLifeRequest/OLife/Party/FullName		Primary owner entity name (e.g. Cor
Owner	Owner_FirstName	/TXLife/TXLifeRequest/OLife/Party/Person/FirstName		Primary owner first name
Owner	Owner_MiddleName	/TXLife/TXLifeRequest/OLife/Party/Person/MiddleName		Primary owner middle name
Owner	Owner_LastName	/TXLife/TXLifeRequest/OLife/Party/Person/LastName		Primary owner last name
Owner	Owner_FullName	/TXLife/TXLifeRequest/OLife/Party/Person/FullName		Primary owner full name (e.g. Mr Jo
Owner	Owner_Prefix	/TXLife/TXLifeRequest/OLife/Party/Person/Prefix		Primary owner prefix (e.g. Mr, Ms)
Owner	Owner_Suffix	/TXLife/TXLifeRequest/OLife/Party/Person/Suffix		Primary owner suffix
Owner	Owner_Alias	/TXLife/TXLifeRequest/OLife/Party/Person/Nickname		primary owner nick name
Owner	Owner_DOB	/TXLife/TXLifeRequest/OLife/Party/Person/BirthDate		Primary owner date of birth
Owner	Owner_Age	/TXLife/TXLifeRequest/OLife/Party/Person/Age		Primary owner actual age
Owner	Owner_IssueAge	/TXLife/TXLifeRequest/OLife/Party/Participant/IssueAge		Primary owner age at issue. Used in
Owner	Owner_AgeNearest	/TXLife/TXLifeRequest/OLife/Party/Participant/IssueAge		Primary owner age nearest birthday
Owner	Owner_Gender	/TXLife/TXLifeRequest/OLife/Party/Person/Gender	List_Gender	Primary owner gender
Owner	Owner_SSN	/TXLife/TXLifeRequest/OLife/Party/GovtID and /TXLife/TXLifeRequest/OLife/Party/GovtIDTC /TXLife/TXLifeRequest/OLife/Party/GovtID and		Primary owner social security numb

- CommonTags_ListName.xlsx hyperlink opens an Excel spreadsheet with all common list values that are available for the associated common tags. The spreadsheet contains the common list values by Party, Address, Product, Annuity and Life.

ListName	ACORDListName	ListValue	CodeValue	Caption	Abbreviation	Description
List_USState	OLI_LU_STATE	1	OLI_USA_AL	Alabama	AL	
List_USState	OLI_LU_STATE	2	OLI_USA_AK	Alaska	AK	
List_USState	OLI_LU_STATE	4	OLI_USA_AZ	Arizona	AZ	
List_USState	OLI_LU_STATE	5	OLI_USA_AR	Arkansas	AR	
List_USState	OLI_LU_STATE	6	OLI_USA_CA	California	CA	
List_USState	OLI_LU_STATE	7	OLI_USA_CO	Colorado	CO	
List_USState	OLI_LU_STATE	8	OLI_USA_CT	Connecticut	CT	
List_USState	OLI_LU_STATE	9	OLI_USA_DE	Delaware	DE	
List_USState	OLI_LU_STATE	10	OLI_USA_DC	District of Columbia	DC	
List_USState	OLI_LU_STATE	12	OLI_USA_FL	Florida	FL	
List_USState	OLI_LU_STATE	13	OLI_USA_GA	Georgia	GA	
List_USState	OLI_LU_STATE	14	OLI_USA_GU	Guam	GU	
List_USState	OLI_LU_STATE	15	OLI_USA_HI	Hawaii	HI	
List_USState	OLI_LU_STATE	16	OLI_USA_ID	Idaho	ID	
List_USState	OLI_LU_STATE	17	OLI_USA_IL	Illinois	IL	
List_USState	OLI_LU_STATE	18	OLI_USA_IN	Indiana	IN	
List_USState	OLI_LU_STATE	19	OLI_USA_IA	Iowa	IA	
List_USState	OLI_LU_STATE	20	OLI_USA_KS	Kansas	KS	
List_USState	OLI_LU_STATE	21	OLI_USA_KY	Kentucky	KY	
List_USState	OLI_LU_STATE	22	OLI_USA_LA	Louisiana	LA	
List_USState	OLI_LU_STATE	23	OLI_USA_ME	Maine	ME	
List_USState	OLI_LU_STATE	25	OLI_USA_MD	Maryland	MD	
List_USState	OLI_LU_STATE	26	OLI_USA_MA	Massachusetts	MA	
List_USState	OLI_LU_STATE	27	OLI_USA_MI	Michigan	MI	
List_USState	OLI_LU_STATE	28	OLI_USA_MN	Minnesota	MN	

3 Download Tag List

Below is the process for generating a Download Tag List, followed by the Generate Mapping Ruleset process, which are used for Common Tag mappings. These processes can be found in the FireLight Admin Help on the “Utilities” tab.

NOTE: Be sure to enable the Download Tag List utility. Go to the **Organization Configuration/Groups/Admin** tab and select the **Enable View Utilities** check box. This enables all utilities for your organization.

Download Tag List is the first of four utilities for converting existing data item tags in forms, wizards, rule sets, packages and the provider to new tags (provider conversion is done only by the Insurance Technologies FireLight team). This utility is especially useful in converting existing tags to common tags.

Additional Information about Common Tag Conversion

See the “Common Tag Conversion Workflow” topic in the Admin Help for details about common tag conversion workflow including initial QE/UAT development and testing, Staging and Production deployment and testing, and after-deployment scenarios for create new activity, existing active activity, and existing locked activity.

3.1 Step 1. Download Tag List

1. On the **Home** page or navigation bar, click **Utilities/Download Tag List** to go to the Download Tag List page.
2. In **Package**, select a package option from the list. (This is a list of Packages that are on the Product Configuration/Packages page.)

TIP: You could add all forms, wizards and rule sets to a "tag conversion" package to convert all your forms, wizards and rule sets in one run. Then move the new converted forms, wizards and rule sets to the applicable packages after verifying the converted tags. This would produce a very large spreadsheet for mapping data items, but would ensure that all form, wizard and rule set tags were converted at the same time.

3. (Optional) Select the **Generate Non-Matching Common Tags** check box to generate a list to include only the data items and export values that are not common tags in FireLight. You are still able to pull all values simply by not selecting the check box.

NOTE: If you have common tag names with export values that you want to change, do not select this check box so the existing common tag name and export values will be included in the spreadsheet.

4. Click the **GENERATE PACKAGE TAG LIST** button.

FireLight searches through all forms, wizards, and rule sets within the selected package and generates a spreadsheet in .csv format with all found data items and export values.

5. On the information bar at the bottom of the screen, choose an option to **Open** or select a **Save** option. Be sure to save the mapping .csv spreadsheet. You will need it for the next step in the tag conversion process.

3.2 Step 2. Create the Mapping Spreadsheet

1. Open the mapping spreadsheet created in step 1.

Rows 1 – 4 contain general information about the product (e.g., Carrier, Package, Product Type, Product). **NOTE:** Product Type and Product fields are currently not supported for tag conversion.

Row 5 contains the column titles.

2. Add new tags and List Values to the mapping spreadsheet using the following as a guide and save the mapping spreadsheet.

Group – the Group column is used to separate the Rule Mapping xml into multiple sections. It is not necessary to separate tags into different groups, but it can make things cleaner.

From Dataitem – current data item tag name. This column is filled in when the .csv spreadsheet is created.

From Value – current name and export value (List Value) in the field properties for the list option if the data item has options (dropdown list, radio buttons, etc.).

NOTE: To assign multiple dropdown value mappings, add a duplicate row for each dropdown item, using the same From Dataitem and To Dataitem for each row, then populate the From Value and To Dataitem Value columns with the corresponding dropdown values. The To Dataitem Value contains the option name followed by a pipe character (|) List Value (export value). See the CommonTags_ListNames.xlsx in the Admin Help, “Common Tags” topic.

To Dataitem – new data item tag name. See the CommonTags.xlsx in Common Tags.

To Dataitem Value – new name and export value for the list option if the data item has options (dropdown list, radio buttons, etc.).

info – additional information

4 Generate Mapping Ruleset

Below are the steps to generate the mapping ruleset.

1. On the navigation bar, click **Utilities/Generate Mapping Rule Set**.
2. Under **Upload Mapping Spreadsheet**, drop the mapping spreadsheet or click in the box and select the mapping spreadsheet.
3. The mapping spreadsheet opens below the box. Click the **PREVIOUS** and **NEXT** buttons to move through the pages of the spreadsheet to verify the mappings from old to new tags.
4. Below the mapping spreadsheet under **Rule Mapping Options**, select the applicable check boxes.

Use getcontrolstate check – Checks if a data item is enabled or disabled.

Use isnullorwhitespace check – Checks if a data item is null or contains just whitespace characters.

Set the rule scope to "Property Change" (instead of "All")

5. Click **BUILD MAPPING**.
6. The rule mappings open below. Scroll down the rules to view and verify the mapping rules.
7. In **Enter Rule Set Name** enter a mapping rule set name for the rule set and click **SAVE RULE SET**.
8. Click **OK** on the confirmation Message dialog box.

FireLight adds the mapping rule set to the grid on the Product Configuration > Rule Sets page.

9. On the navigation bar, click **Product Config > Rule Sets**. Select the approved states in the **State Approved** grid.
10. Add the mapping rule set to the corresponding product package on the **Product Configuration > Packages** page.

5 Common Tags for Distributors

The new distributors will all be built on the common tags with “D_” value added in front of each data item. This D_ is put in place on all Distributor common tags in the event both distributor and carrier have like rules. All distributor implementations will be tagged with the D_ in front of the existing common tag to prevent any rule issues. Example: D_Owner_FirstName.

5.1 List Values Grouping

All list values found in the CommonTags_ListName.xlsx in the FireLight Admin Help are required to be used when mapping from Distributor to Carrier. To locate the proper list value, access the **CommonTags.xlsx** spreadsheet found in the FireLight Admin Help.

The groups for the List values can be found in column D as highlighted below.

CommonTagGroup					
	A	B	C	D	
1	CommonTagGroup	CommonTag	ACORDMapping	ListName	Description
2	Owner	Owner_TaxRate			Primary owner tax bracket
3	Owner	Owner_TaxRate_DurationType		List_DurationType	Tax bracket duration type which can
4	Owner	Owner_TaxRate_StartDuration			Tax bracket starting duration which
5	Owner	Owner_TaxRate_NumberOfYears			Tax bracket number of years which
6	Owner	Owner_Type		List_OwnerType	Primary owner type used in an activ
7	Owner	Owner_NonNaturalName	/TXLife/TXLifeRequest/OLife/Party/FullName		Primary owner entity name (e.g. Cor
8	Owner	Owner_FirstName	/TXLife/TXLifeRequest/OLife/Party/Person/FirstName		Primary owner first name
9	Owner	Owner_MiddleName	/TXLife/TXLifeRequest/OLife/Party/Person/MiddleName		Primary owner middle name
10	Owner	Owner_LastName	/TXLife/TXLifeRequest/OLife/Party/Person/LastName		Primary owner last name
11	Owner	Owner_FullName	/TXLife/TXLifeRequest/OLife/Party/Person/FullName		Primary owner full name (e.g. Mr Jo
12	Owner	Owner_Prefix	/TXLife/TXLifeRequest/OLife/Party/Person/Prefix		Primary owner prefix (e.g. Mr, Ms)
13	Owner	Owner_Suffix	/TXLife/TXLifeRequest/OLife/Party/Person/Suffix		Primary owner suffix
14	Owner	Owner_Alias	/TXLife/TXLifeRequest/OLife/Party/Person/Nickname		Primary owner nick name
15	Owner	Owner_DOB	/TXLife/TXLifeRequest/OLife/Party/Person/BirthDate		Primary owner date of birth
16	Owner	Owner_Age	/TXLife/TXLifeRequest/OLife/Party/Person/Age		Primary owner actual age
			/TXLife/TXLifeRequest/OLife/Party/Participant/IssueAge		
			/TXLife/TXLifeRequest/OLife/Party/LifeParticipant/IssueAge		
17	Owner	Owner_IssueAge			Primary owner age at issue. Used in
18	Owner	Owner_AgeNearest			calculated for the selected product.
19	Owner	Owner_Gender	/TXLife/TXLifeRequest/OLife/Party/Person/Gender	List_Gender	Primary owner gender

Once the proper group name is located, refer to the **CommonTags_ListName.xlsx** spreadsheet in the FireLight Admin Help.

A	B	C	D	E	F	G
ListName	ACORDListName	ListValue	CodeValue	Caption	Abbreviation	Description
List_Gender	OLI_LU_GENDER	1	OLI_GENDER_MALE	Male	M	
List_Gender	OLI_LU_GENDER	2	OLI_GENDER_FEMALE	Female	F	
List_Gender	OLI_LU_GENDER	3	OLI_GENDER_UNISEX	Unisex	U	
List_Gender	OLI_LU_GENDER	5	OLI_GENDER_INTERSEX	Intersex		
List_Gender		0		None		
List_Gender		-1000		Other		
List_MaritalStatus	OLI_LU_MARSTAT	1	OLI_MARITAL_MARRIED	Married		
List_MaritalStatus	OLI_LU_MARSTAT	2	OLI_MARITAL_SINGLE	Single		
List_MaritalStatus	OLI_LU_MARSTAT	3	OLI_MARITAL_DIVORCED	Divorced		
List_MaritalStatus	OLI_LU_MARSTAT	4	OLI_MARITAL_WIDOWED	Widowed		
List_MaritalStatus	OLI_LU_MARSTAT	5	OLI_MARITAL_SEPARATED	Legally Separated		
List_MaritalStatus	OLI_LU_MARSTAT	6	OLI_MARITAL_COMMONLAW	Common Law		
List_MaritalStatus	OLI_LU_MARSTAT	7	OLI_MARITAL ESTRANGED	Estranged		
List_MaritalStatus	OLI_LU_MARSTAT	10	OLI_MARITAL_DOMESTICPARTNER	Domestic Partner		
List_MaritalStatus	OLI_LU_MARSTAT	11	OLI_MARITAL_CIVILUNION	Civil Union		
List_MaritalStatus		0		None		
List_MaritalStatus		-1000		Other		
List_EmploymentStatus	OLI_LU_EMPSTATTYPECODES	1	OLI_EMPSTAT_ACTIVE	Active		
List_EmploymentStatus	OLI_LU_EMPSTATTYPECODES	2	OLI_EMPSTAT_NOTACTIVE	Not Active		
List_EmploymentStatus	OLI_LU_EMPSTATTYPECODES	3	OLI_EMPSTAT_DISABLED	Disabled		
List_EmploymentStatus	OLI_LU_EMPSTATTYPECODES	4	OLI_EMPSTAT_LEAVEOFABSENCE	Leave of Absence		

5.2 List Names

Column A, titled ListName, shows the group names of the list values. Column C shows the List Value that needs to be used in the mapping rule for that specific Common Tag. If a client needs to view the List Value caption or abbreviation, a pipe is added to the List Value in the field and the rules of that Common Tag.

Example: Owner_ResidentialAddress_State Common tag is used for the state of AL. The proper List Value would show as AL | 1 as 1 is the proper List Value for AL.

6 Master Form for Testing

A master form with Distributor Common Tags will be used for testing. This form will act as the distributor and allow the ability to test all Distributor to Carrier Mappings.

The Master Form that can be used for testing will be in the shared drive:

P:\Engineering\Firelight\Firelight Forms\Master mappings.

Example of a Master Mapping Form:

D_Own

103 Mapping Form

FLI_PRODUCT_NAME

Is this account for a Chase Private Client Customer?

Yes

Is this a JPMS Transaction?

Yes

No

Transaction Type

FLI_PRODUCT_CUSPID

FLI_ROLE

New Contract

Addition

BD Change

FLI_PRODUCT_TYPE_NA

Transaction ID

D_Annuity_Transaction

Contract/Policy Number

D_Annuity_Contract_Number

Do you expect to ever do buisness with this customer in a language other than English?

Yes

No

Bin Number

D_Annuity_BIN

Life Insurance/Annuity account linked to Chase Deposit account for Checking Account Number:

D_LinkingInfo_CheckingAcco

Date of Transaction

Source of Wealth (select all that apply)

Inheritance

Income From Employment

Sales of Business

Gift

Insurance Payout

Other

Source of Wealth Other Textbox

D_SourceOfWealth_Other_De

Fund Type - Non-Qualified vs. Qualified

Non-Qualified

Qualified

Carrier Deposit Number

D_Carrier_Deposit_Number

Annuity Deposit Number

D_Annuity_Deposit_SeqNur

D_Rider_F

D_Owner_FullName

Linking Information

Life Insurance/Annuity account linked to Chase Deposit account for Checking Account Number

Pricing

Do you authorize us to deliver any type of document to your existing and future investment accounts and relationships with JPMorgan Chase & Co. to the email you provided?

Yes

No

Owner's Name if different then Insured - First Name

D_Owner_NonNaturalFir

Owner's Name if different then Insured - Middle Name

D_Owner_NonNaturalMid

Owner Information

Show Tags

Show Tab Order

Ownership Type

FLI_ORGANIZ

FLI_PRODUCT

Is Owner a Trust?

Yes

No

Owner Occupation

D_Owner_EmpDetail

Owner Employer Name

D_Owner_EmpDetail

Owner Employer City

D_Owner_EmpDetail

Owner Employer State

Owner - My employer is a registered broker/dealer

Owner Age

D_Owner_Age

Owner Title

D_Owner_Title

Owner Prefix

D_Owner_Prefix

Owner Suffix

D_Owner_Suffix

Owner Email

D_Owner_Primary_E

Owner Citizenship Status

USA

Resident Alien

Owner Country of Citizenship

Owner First Name

D_Owner_FirstName

Owner Middle Name

D_Owner_MiddleName

Owner Last Name

D_Owner_LastName

Owner SSN

D_Owner_SSN

Owner Date of Birth

Owner # Dependents

D_Owner_NumberOf

Owner Gender

Male

Female

Owner Marital Status

Single

Married

Owner Primary Identification Type

Owner Identification Number

D_Owner_ID_Number

Owner ID Issue Date

Owner ID Issue State/Country

D_Owner_ID_State

Owner ID Expiration Date

Owner Legal/Residential Address

D_Owner_Residential

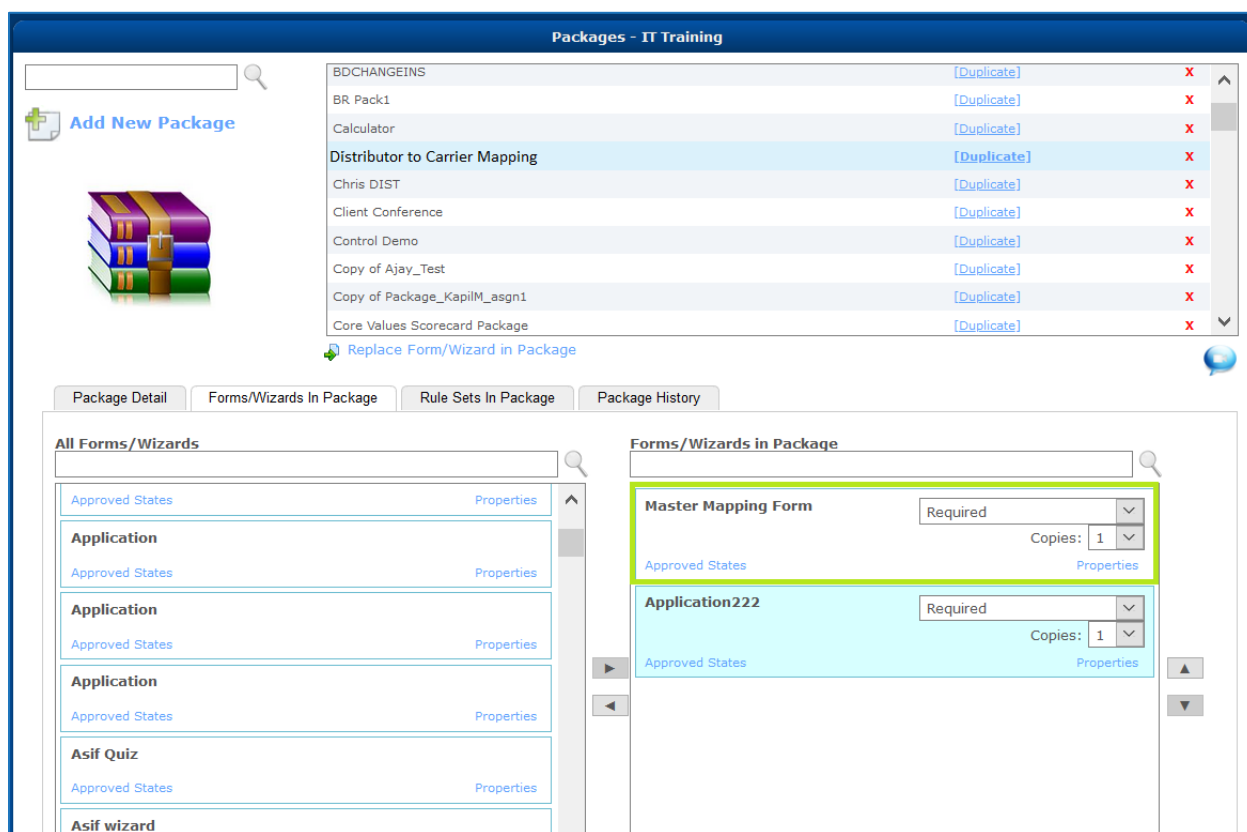
Owner Legal/Residential Address Line 2

D_Owner_Residential

Owner Legal/Residential Address City

D_Owner_Residential

To use the Master Mapping form effectively, the user will add the master mapping form and Distributor to Carrier ruleset to a selected package within the Carrier's environment.



The Master Mapping Form acts as the Distributor in testing, and allows developers to create Distributor to Carrier Mapping rules and test without deploying to an active distributor.

7 Individual Rules in One Master Rule Set

All mapping rules will be broken out individually. This is to ensure that errors within rules that have conditions and do not exist in the carrier, do not break the rule that is generated. These rules will be added into one rule set called Carrier Distributor Mapping.

The process to convert Mapping rules into individual rules are as follows:

1. Generate the download tag list by clicking the **Generate Package Tag List** button in the Download Tag List screen:

Firelight enables an Excel spreadsheet with all download tags from the selected package.

- The highlighted Group in column A is where the user can group the rules that will be generated by the conversion tool. Each Group name must be unique for FireLight to separate the rules for that field correctly as shown in the example below:

	A	B	C	D	E	F	G
1	Carrier	IT Training					
2	Package	Chris DIST					
3	Product Type						
4	Product						
5	Group	From Dataitem	From Value	To Dataitem	To Dataitem Value	info	
6	Owner First	D_Owner_FirstName		Owner_FirstName			
7	Owner SSN	D_Owner_SSN		Owner_ResidentialAddress1			
8	Owner Phone	D_Owner_Home_PhoneNumber		Owner_SSN			
9	Owner DOB	D_Owner_DOB		Owner_DOB			
10	Annuitant SSN	D_Owner_Annuitant_SSN		Owner_Annuitant_SSN			
11	Owner Gender	D_Owner_Gender	M 1	Owner_Gender		1	
12	Owner Gender	D_Owner_Gender	F 2	Owner_Gender		2	
13							
14							

- Once the desired Group names are in place along with the “From Dataitem” and “To Dataitem” tags, the user saves the Excel file and proceeds to the mapping.
- The user will then select the appropriate option from the utilities button. Generate Mapping ruleset will be selected.

Generate mapping ruleset maps the From Dataitems in column B to the To Dataitems in column D in the Excel file.

- In the Generate Mapping Ruleset screen, the user uploads the corrected Excel file. Under **Rule Mapping Options**, the user selects the check boxes for **Use getcontrolstate** check and **Set the rule scope to Property Change (instead of All)**.

Administration - IT Training
Generate Mapping Rule Set

Upload Mapping Spreadsheet

Drop excel file here, or click to select file
TAGS DOCUMENTATION.xlsx

Mapping Data

Group	From Database	From Value	To Database	To Value
Owner First	D_Owner_FirstName		Owner_FirstName	
Owner SSN	D_Owner_SSN		Owner_ResidentialAddress1	
Owner Phone	D_Owner_Home_PhoneNumber		Owner_SSN	
Owner DOB	D_Owner_DOB		Owner_DOB	
Resident SSN	D_Owner_Resident_SSN		Owner_Resident_SSN	
Owner Gender	D_Owner_Gender	M 1	Owner_Gender	1
Owner Gender	D_Owner_Gender	F 2	Owner_Gender	2

Page 1 of 1 10 rows

Rule Mapping Options

☒ Use getcontrolstate check
☐ Use isnullonresponse check
☒ Set the rule scope to "Property Change" (instead of "All")

BUILD MAPPING

Although the mapping rule is generated as one rule, the rule itself is coded to show as separate rules. The user will be able to see the rules broken out by identifying the `<ScriptCode>` and `</ScriptCode>`. This signifies the beginning of one rule and the end of that rule. Below are highlighted examples of broken out rules.

Rules broken out example:

```
<ArrayOfRuleDef xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
```

```
<RuleDef>
```

```
<ScriptCode>
```

```
<if>
```

```
<condition>
```

```
<compare op="==">
```

```
<const value="IT Training" />
```

```
<diget dataitemid="FLI_PRODUCT_CARRIER_NAME" />
```

```
</compare>
```

```
</condition>
```

```
<if>
```

```
<condition>
```

```
<getcontrolstate dataitemid="Owner_FirstName" />
```



```

    </condition>
    <diset dataitemid="Owner_FirstName">
        <diget dataitemid="D_Owner_FirstName" />
    </diset>
</if>
</if>
</ScriptCode>
<Version>2.17.195</Version>
<RuleName>IT Training: Owner First</RuleName>
<Class>PropertyChange</Class>
<LastUpdate>6/2/2020 2:37 PM</LastUpdate>
</RuleDef>
<RuleDef>
    <ScriptCode>
        <if>
            <condition>
                <compare op="==">
                    <const value="IT Training" />
                    <diget dataitemid="FLI_PRODUCT_CARRIER_NAME" />
                </compare>
            </condition>
            <if>
                <condition>
                    <getcontrolstate dataitemid="Owner_ResidentialAddress1" />
                </condition>

```

```

    <diset dataitemid="Owner_ResidentialAddress1">
    <diget dataitemid="D_ResidentialAddress1_SSN" />
  </diset>
</if>
</if>
</ScriptCode>
<Version>2.17.195</Version>
<RuleName>IT Training: Owner SSN</RuleName>
<Class>PropertyChange</Class>
<LastUpdate>6/2/2020 2:37 PM</LastUpdate>
</RuleDef>
<RuleDef>
  <ScriptCode>
    <if>
      <condition>
        <compare op="==">
          <const value="IT Training" />
          <diget dataitemid="FLI_PRODUCT_CARRIER_NAME" />
        </compare>
      </condition>
    </if>
    <condition>
      <getcontrolstate dataitemid="Owner_SSN" />
    </condition>
    <diset dataitemid="Owner_SSN">

```

```
<diget dataitemid="D_Owner_SSN" />
</diset>
</if>
</if>
</ScriptCode>
<Version>2.17.195</Version>
<RuleName>IT Training: Owner Phone</RuleName>
<Class>PropertyChange</Class>
<LastUpdate>6/2/2020 2:37 PM</LastUpdate>
</RuleDef>
<RuleDef>
<ScriptCode>
<if>
<condition>
<compare op="==">
<const value="IT Training" />
<diget dataitemid="FLI_PRODUCT_CARRIER_NAME" />
</compare>
</condition>
<if>
<condition>
<getcontrolstate dataitemid="Owner_DOB" />
</condition>
<diset dataitemid="Owner_DOB">
<diget dataitemid="D_Owner_DOB" />
```

```
</diset>

</if>

</if>

</ScriptCode>

<Version>2.17.195</Version>

<RuleName>IT Training: Owner DOB</RuleName>

<Class>PropertyChange</Class>

<LastUpdate>6/2/2020 2:37 PM</LastUpdate>

</RuleDef>

<RuleDef>

  <ScriptCode>

    <if>

      <condition>

        <compare op="==">

          <const value="IT Training" />

          <diget dataitemid="FLI_PRODUCT_CARRIER_NAME" />

        </compare>

      </condition>

    </if>

    <condition>

      <getcontrolstate dataitemid="Owner_Annuitant_SSN" />

    </condition>

    <diset dataitemid="Owner_Annuitant_SSN">

      <diget dataitemid="D_Owner_Annuitant_SSN" />

    </diset>

  </ScriptCode>

</RuleDef>

</RuleDef>
```

```
</if>

</if>

</ScriptCode>

<Version>2.17.195</Version>

<RuleName>IT Training: Annuitant SSN</RuleName>

<Class>PropertyChange</Class>

<LastUpdate>6/2/2020 2:37 PM</LastUpdate>

</RuleDef>

<RuleDef>

  <ScriptCode>

    <if>

      <condition>

        <compare op="==">

          <const value="IT Training" />

          <diget dataitemid="FLI_PRODUCT_CARRIER_NAME" />

        </compare>

      </condition>

    </if>

    <condition>

      <getcontrolstate dataitemid="Owner_Gender" />

    </condition>

    <if>

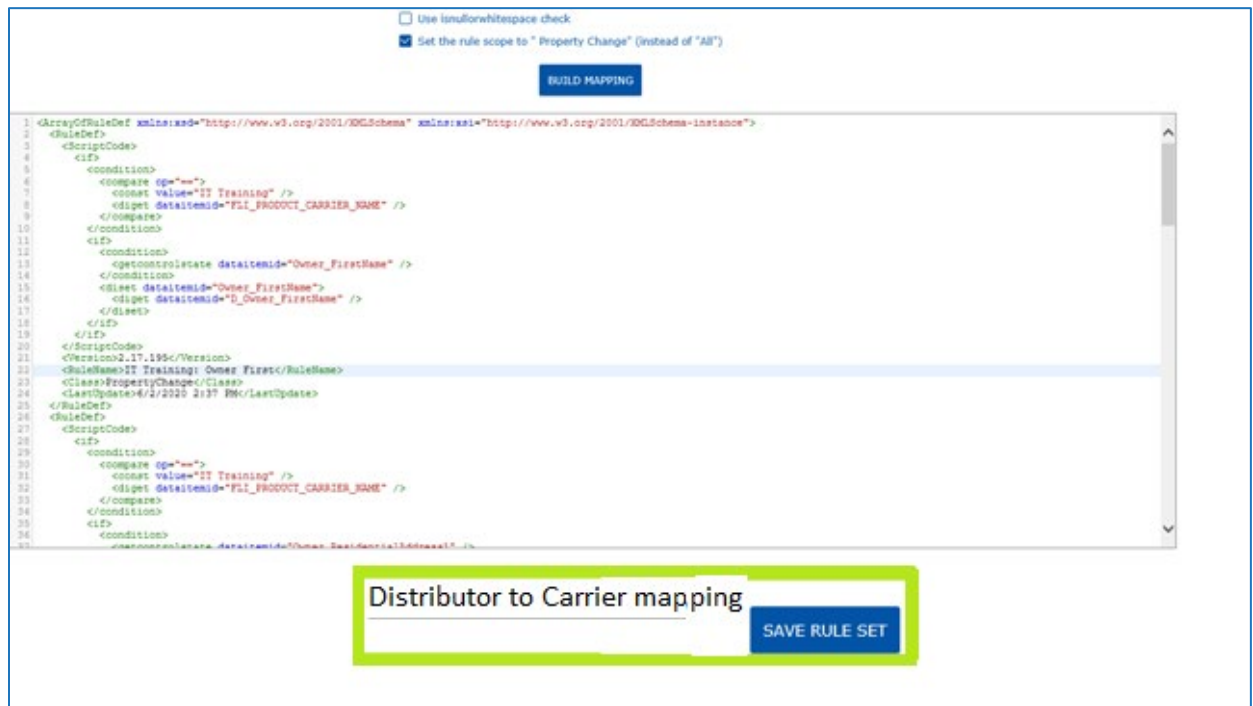
      <condition>

        <compare op="==">

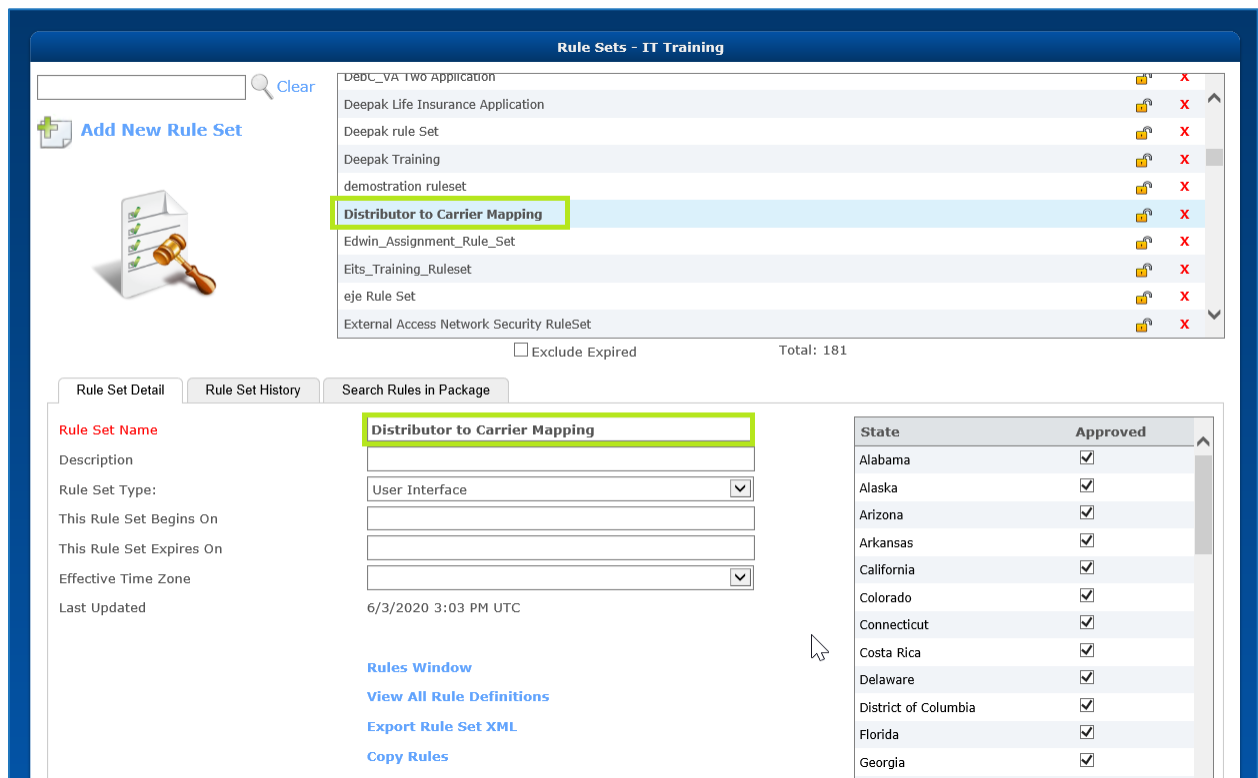
          <diget dataitemid="D_Owner_Gender" />
```

```
<const value="M| 1" />
</compare>
</condition>
<diset dataitemid="Owner_Gender">
  <const value="1" />
</diset>
<elseif>
  <compare op="==">
    <diget dataitemid="D_Owner_Gender" />
    <const value="F| 2" />
  </compare>
</elseif>
<diset dataitemid="Owner_Gender">
  <const value="2" />
</diset>
</if>
</if>
</if>
</ScriptCode>
<Version>2.17.195</Version>
<RuleName>IT Training: Owner Gender</RuleName>
<Class>PropertyChange</Class>
<LastUpdate>6/2/2020 2:37 PM</LastUpdate>
</RuleDef>
</ArrayOfRuleDef>
```

6. The user names the ruleset and saves it by clicking **SAVE RULE SET**.



Ruleset as seen in Rule Sets page:



- The user selects the ruleset on the left and is able to view all rules broken out by the grouping that was applied.

Filter Rules with Field

Enter a Value

IT Training: Annuitant SSN

IT Training: Owner DOB

IT Training: Owner First

IT Training: Owner Gender

IT Training: Owner Phone

IT Training: Owner SSN

EXPORT RULES

DELETE ALL

Rule Name

IT Training: Owner First

NEW RULE

Rule Scope

Property Change

```

1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
<!--
  <condition>
    <compare op="=" />
    <const value="IT Training" />
    <digit dataitemid="TFL_PRODUCT_CARRIER_NAME" />
  </compare>
  </condition>
  <!--
  <condition>
    <controlstate dataitemid="Owner_FirstName" />
  </condition>
  </condition>
  <!--
  <digit dataitemid="Owner_FirstName" />
  <digit dataitemid="D_Owner_FirstName" />
  </digit>
  </if>
-->

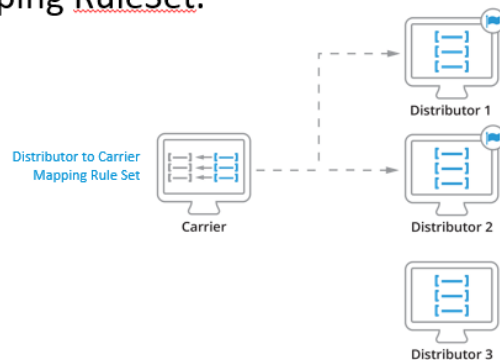
```

No Errors

This ruleset is complete and available to be added to the package that is designated as mapping from Distributor to Carrier.

Flag to Control When to Use the Distributor to Carrier Master Form Mapping

- In order to eliminate breaking existing distributor mappings we have created a Flag that will be set to indicate when to utilize the Distributor to Carrier Mapping RuleSet.



NOTE: USE_CARRIER_MAPPING needs to be added to all mapping rules manually. This data item will act as a trigger for all Distributor to Carrier mapping rules. If the USE_CARRIER_MAPPING is True than the Distributor to Carrier mapping ruleset will enable. If USE_CARRIER_MAPPING is False the Distributor to Carrier mapping will NOT enable.

Following are the steps to implement and test the USE_CARRIER_MAPPING data item.

1. Add a Textbox on the master mapping form with tag "USE_CARRIER_MAPPING" as follows.

The screenshot shows a complex mapping form titled '103 Mapping Form'. At the top, there's a header bar with several tabs and a red box highlighting the 'USE_CARRIER_MAPPING' tag. The form is divided into two main sections: 'Account Information' on the left and 'Owner Information' on the right. The 'Account Information' section includes fields for 'Transaction Type', 'Transaction ID', 'Contract/Policy Number', 'Bin Number', 'Date of Transaction', 'Source of Wealth', 'Fund Type', 'Carrier Deposit Number', 'Annuity Deposit Number', 'Linking Information', and 'Pricing'. The 'Owner Information' section includes fields for 'Ownership Type', 'Is Owner a Trust?', 'Owner Occupation', 'Owner Employer Name', 'Owner Employer City', 'Owner Employer State', 'Owner - My employer is a registered broker/dealer', 'Owner Age', 'Owner Title', 'Owner Prefix', 'Owner Suffix', 'Owner Email', 'Owner Citizenship Status', 'Owner Country of Citizenship', 'Owner First Name', 'Owner Middle Name', 'Owner Last Name', 'Owner SSN', 'Owner Date of Birth', 'Owner # Dependents', 'Owner Gender', 'Status', 'Owner Primary Identification Type', 'Owner Identification Number', 'Owner ID Issue Date', 'Owner ID Issue State/Country', 'Owner ID Expiration Date', 'Owner Legal/Residential Address', and 'Owner Legal/Residential Address Line 2'. A blue arrow points to a field labeled 'Label_80' in the 'Owner Information' section.

2. Add `<digit dataitemid="USE_CARRIER_MAPPING" type="Boolean" />` line to all mapping rules.

Example:

```
<if>
```

```
<condition>
```

```
<getcontrolstate dataitemid="Annuitant_FirstName" />
```

```
<digit dataitemid="UseCarrierMapping" type="Boolean" />
```

```
</condition>
```

```
<diset dataitemid="Annuitant_FirstName">
```

```
<diget dataitemid="D_Annuitant_FirstName" />
```

```
</diset>
```

```
</if>
```

3. Add the rule below to enable carrier mapping in distributor.

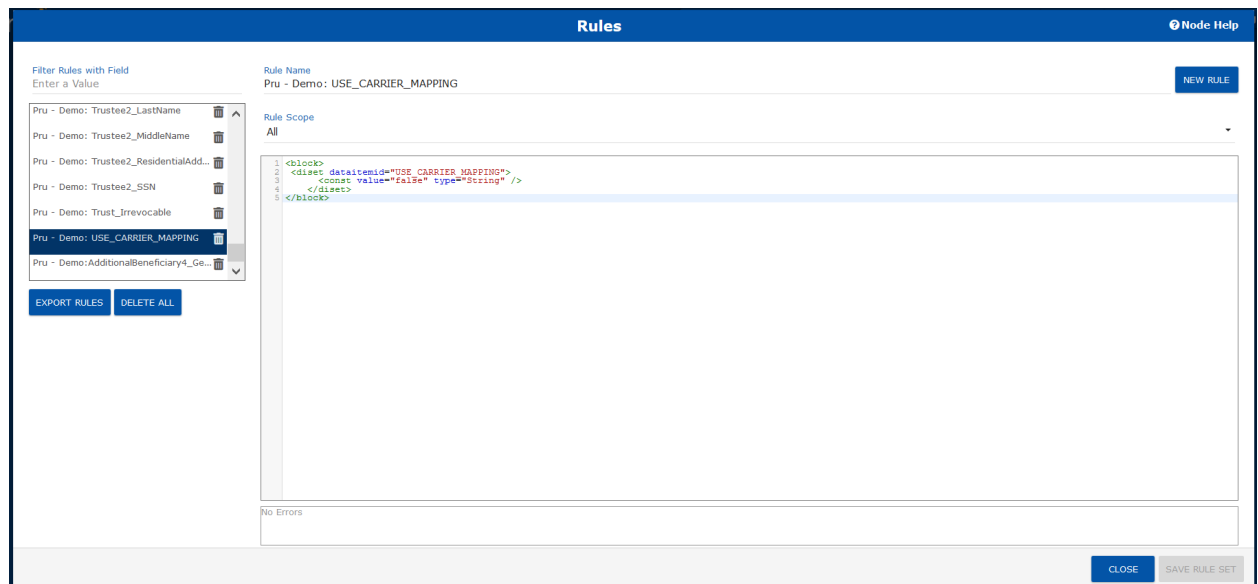
```
<diset dataitemid=" USE_CARRIER_MAPPING ">
```

```
<const value="true" type="String" />
```

```
</diset>
```

This rule needs to be added to your Distributor to Carrier ruleset manually.

Example:



In real life, the rule mentioned in step 3 should add in distributor environment for which we want to run mapping.

When adding the USE_CARRIER_MAPPING flag rule the user will need to be aware of several variations shown below:

- Removal of the flag rule:

If the flag rule is not present, the Distributor to Carrier mapping ruleset will not enable the ruleset.

- Add False Value to USE_CARRIER_MAPPING flag rule:

```
<diset dataitemid=" USE_CARRIER_MAPPING ">  
    <const value="false" type="String" />  
</diset>
```

USE_CARRIER_MAPPING rule is set to false and will not correctly map Distributor to Carrier Mapping.

- Add True Value to USE_CARRIER_MAPPING flag rule:

```
<diset dataitemid=" USE_CARRIER_MAPPING ">  
    <const value="true" type="String" />  
</diset>
```

USE_CARRIER_MAPPING rule is set to true and will correctly map Distributor to Carrier Mapping.

- Add USE_CARRIER_MAPPING flag rule to distributor:

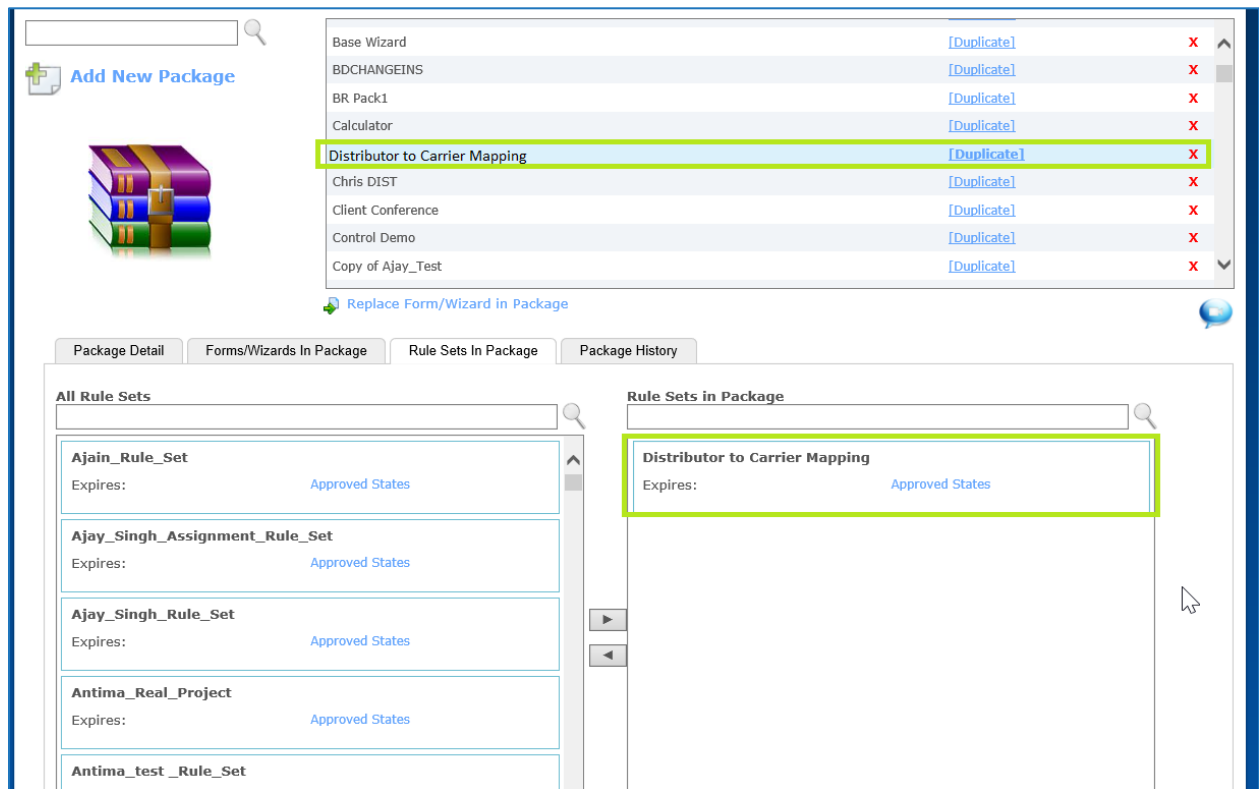
In a live Distributor to Carrier Mapping, the USE_CARRIER_MAPPING rule will be included within the Distributor ruleset.

8 Rule Set Resides with Carrier

The Rule Set with the mapping will reside in the Carrier package with the name Distributor to Carrier Mapping. That package will be added to the sales agreements and deployed to the distributor. Doing this will eliminate the redundant mapping when bringing up a new distributor.

1. Once the Distributor to Carrier ruleset is complete, the user adds this ruleset to the desired Forms/Wizard Package.

Example:



2. Once the package is complete, the user then adds the completed package to the desired Distributor Sales Agreement as shown below.

NOTE: “Distributor to Carrier Mapping ruleset” will trigger only if “UseCarrierMapping” tag = “True”. We will set it “True” in distributor instance only for new distributors.

Example:

Item	Value	Checkbox
Asif_Test_Quote	False	X
BD Change - INS	False	X
BDCHANGEINS	False	X
BR Prod	False	X
Calculator	False	X
chris	True	X
Distributor to Carrier Mapping	True	X
Client Conference	False	X
Control Demo	False	X
Core Value Scorecard	False	X

Sales Agreement of "IT Training" for product "Chris Common tag Training"

Selling Org: Distributor Training Organization

Product Name:

Start: / **End**: /

Time Zone:

Replace Product: Select Replaced Product

Illust Services Role:

Last Updated: 4/23/2020 1:14 PM UTC

Available Packages

- Ajay_Singh_Package Application
- Antima_Real_Package Application
- Asif_FLTraining_Package Application
- Asif_Test_Quote Application
- Base Issue test Application
- Base Wizard Application
- BDCHANGEINS Post Issue
- BR Pack1 Application

Assigned Packages

- Distributor to Carrier Mapping** Application
- Package Duty Required

- Once the desired package is saved, a deployment needs to occur in order to send the completed package to the Distributor. As with all deployments, the desired synchronization scope must be selected. In this example, Distributor All Configuration is selected in order to deploy all necessary changes. Verify that the correct package is with the proper distributor to deploy to.

Deploy - IT Training

Synchronization Scope: Distributor All Configuration
Reason:

Deployment
History

Type here to filter by organization or description
Check/Uncheck All
☐

Description	Organization	Deploy
Ajay_Singh_Product	Distributor Training Organization	<input type="checkbox"/>
BD Change - INS	JP Morgan Chase	<input type="checkbox"/>
BDCHANGEINS	JP Morgan Chase	<input type="checkbox"/>
Distributor to Carrier Mapping	Distributor Training Organization	<input checked="" type="checkbox"/>
Gaurav iSured Annuity Application Product	Distributor Training Organization	<input type="checkbox"/>
Poonam_Application222_Product	Distributor Training Organization	<input type="checkbox"/>
Poonam_Lana Test Product	Distributor Training Organization	<input type="checkbox"/>
PYadav_Test_Product [Deleted]	Advisor Group	<input type="checkbox"/>
Training Product	Commonwealth Financial Network	<input type="checkbox"/>
training_Antima [Deleted]	AXA Distributor	<input type="checkbox"/>
training_Antima [Deleted]	HD Vest	<input type="checkbox"/>

☐ Correct Out-of-Sync Environments

Deploy Now

[View All Scheduled Deployments](#)

Schedule Deployment at (Mountain Time):

Schedule Deployment

Chris Common tag Training

Product Changes:	0
Form Changes:	2
Package Changes:	1
Sales Agreement Changes:	1
Rule Set Changes:	1

Total for Selected Items

Product Changes:	0
Form Changes:	2
Package Changes:	1

- To verify that the deployment is successful, the user enters the distributor environment and goes to the Sales Agreement page.

Distributor Training Organization

Product	Agreement
chris	True
Distributor to Carrier Mapping	True
Gaurav iSured Annuity Application Product	True
NLI Annuity ITTRN Product	True
Poonam_Application222_Product	True
Poonam_Lana Test Product	True

Sales Agreement of "Distributor Training Organization" for product "Chris Common tag Training"

Sales Agreement Details | **Sales Agreement History**

Carrier Org IT Training

Product Name

More Info

Start **End**

Time Zone

Replace Product Select Replaced Product

Illust Services Role

Last Updated 6/3/2020 5:17 PM UTC

Auto Deploy ☐

State Approvals | **Back Office Script** | **Options**

State **Approved**

Alabama	<input checked="" type="checkbox"/>
Alaska	<input checked="" type="checkbox"/>

Available Packages

- Gaurav iSured Distributor Package Application
- NLI Forms DITTRN Package Application
- Poonam Application222 Distributor Package Application
- Poonam Lana Test Distributor Package Application

Assigned Packages

- Chris Distributor Package Application
- Package Duty Required
- Distributor to Carrier Mapping**
- Application Package Duty Required

- In the Sales Agreement Page, the user verifies the deployed Carrier package is present and adds the completed package to the desired Distributor package. The Distributor package must be first in the Assigned Packages list as the user is mapping from Distributor to Carrier.
- Testing in the Distributor Environment can now occur. The user enters the FireLight application and begins to fill out all fields that have been mapped in the Distributor to Carrier Ruleset.

Distributor Form:

1 DATA ENTRY 99%

2 SIGNATURES

3 REVIEW

4 FINALIZE

CONTINUE

Common tag test

Owner Section

Owner First Name chris	Owner Middle Name 	Owner Last Name henry	Owner SSN/TIN 123-45-6780
---------------------------	-----------------------	--------------------------	------------------------------

Address (city, state and zipcode) 6213 west 102nd avenue	Phone Number (123) 456-0000
---	--------------------------------

City any town	State Alabama	ZipCode 80001-0000
------------------	------------------	-----------------------

Address (city, state and zipcode) (Mailing Address) 	Marital Status
---	--------------------

City 	State 	ZipCode 	Date Of Birth 07/01/2000
----------	-----------	-------------	-----------------------------

Non Natural Name	Owner Age
------------------	-----------

Carrier Form:

1 DATA ENTRY 99%

2 SIGNATURES

3 REVIEW

4 FINALIZE

CONTINUE

Page 1

Poonam_Common tag Training

SAMPLE / TRAINING PURPOSES ONLY

VARIABLE ANNUITY APPLICATION

PARTICIPANTS

BENEFICIARIES

OWNERSHIP

INVESTMENT ALLOCATIONS

OWNER

NAME (first Middle Initial, last)

chris

henry

SSN/TIN

123456780

ADDRESS (number and street, city, state, zip)

6213 west 102nd avenue

PHONE NO. (include area code)

1234560000

any town

Alaba

800010000

MARITAL STATUS

MAILING ADDRESS (if different)

GENDER

☐ M
☐ F

DATE OF BIRTH

07/01/2000

TRUST

☐ Yes
☐ No

The information that was entered in the Distributor form is now mapped into the Carrier form.

***Important Note from the test shown above.**

When data is entered in the Distributor forms and correctly maps, a user will see the following screens.

Distributor:

1 DATA ENTRY 100%
2 SIGNATURES
3 REVIEW
4 FINALIZE
CONTINUE

Page 1
Index Annuity Insurance Authorization Form

Index Annuity Insurance Authorization Form
Chase Insurance Agency, Inc.
Insurance and Annuities made available through Chase Insurance Agency, Inc. or affiliated agencies.

1. Primary Contract Owner (or annuitant if trust)
2. Joint Contract Owner

Citizenship Status (select one)
☐ USA
☐ Resident Alien (provide Country of Citizenship)

Name
Bob W Johnson

Social Security or Tax ID Number
Date of Birth (mm/dd/yyyy)
Dependents

Gender (select one)
☐ Male ☐ Female
Marital Status (select one)
☐ Single ☐ Married

Primary Identification Type

Identification Number
ID Issue Date (mm/dd/yyyy)

ID State/Country
ID Expiration Date (mm/dd/yyyy)

Legal/Residential Address (no P.O. Box or "In Care Of" address)

City
State
Zip Code

Citizenship Status (select one)
☐ USA
☐ Resident Alien (provide Country of Citizenship)

Name

Social Security or Tax ID Number
Date of Birth (mm/dd/yyyy)
Dependents

Gender (select one)
☐ Male ☐ Female
Marital Status (select one)
☐ Single ☐ Married

Primary Identification Type

Identification Number
ID Issue Date (mm/dd/yyyy)

ID State/Country
ID Expiration Date (mm/dd/yyyy)

Legal/Residential Address (no P.O. Box or "In Care Of" address)

City
State
Zip Code

Carrier:

Page 1
Defined Income Application

A. TYPE OF OWNERSHIP
Non Entity: ☒ Natural Person(s)
Entity: ☐ Custodian ☐ C Corporation* ☐ S Corporation* ☐ Trust*
*If the Owner is a Trust, Corporation or other entity you must complete and submit the Certificate of Entity form with this application.

B. OWNER
Is owner same as annuitant? ☐ Yes ☐ No
Name (First, Middle, Last, or Trust / Entity)
Bob W Johnson
Male ☐ Female ☐
Birth Date (Mo - Day - Yr)
SSN / TIN
Street Address
City
State
ZIP
Telephone Number
Mobile Number
E-mail Address
Relationship to Co-Owner
☐ U.S. Citizen ☐ Resident Alien/Citizen of:
☐ Non-Resident Alien/Citizen of: (Submit IRS Form W-8 (BEN, ECI, EXP or IMY))

C. CO-OWNER - Not available for entity-owned Annuities or Qualified Annuities. If a Co-owner is elected, then the Spousal Designated Lives option must be chosen above
Is there a co-owner? ☐ Yes ☐ No
Is co-owner same as annuitant? ☐ Yes ☐ No
Check here to designate the Co-Owners as each other's Primary Beneficiary.
Name (First, Middle, Last)
Male ☐ Female ☐
Birth Date (Mo - Day - Yr)
SSN / TIN
Street Address
Address same as owner's? ☐ Yes ☐ No
City
State
ZIP
☐ U.S. Citizen ☐ Resident Alien/Citizen of:
☐ Non-Resident Alien/Citizen of: (Submit IRS Form W-8 (BEN, ECI, EXP or IMY))

This mapping is correct as all data from the distributor mapped to the carrier correctly.

However, in the situation that a user changes the carrier data, will the data change to the distributor?

Carrier change:

Page 1 Defined Income Application

A. TYPE OF OWNERSHIP
Non Entity: ☒ Natural Person(s)
Entity: ☐ Custodian ☐ C Corporation* ☐ S Corporation* ☐ Trust*
**If the Owner is a Trust, Corporation or other entity you must complete and submit the Certificate of Entity form with this application.*

B. OWNER Is owner same as annuitant? ☐ Yes ☐ No
Name (First Middle Last or Trust / Entity) ☐ Male ☐ Female Birth Date (Mo - Day - Yr) SSN / TIN
Chris W Johnson
Street Address City State ZIP
Telephone Number Mobile Number
E-mail Address
Relationship to Co-Owner
☐ U.S. Citizen ☐ Resident Alien/Citizen of:
☐ Non-Resident Alien/Citizen of: (Submit IRS Form W-8 (BEN, ECI, EXP or IMY))

C. CO-OWNER - Not available for entity-owned Annuities or Qualified Annuities. If a Co-owner is elected, then the Spousal Designated Lives option must be chosen above Is there a co-owner? ☐ Yes ☐ No
☐ Check here to designate the Co-Owners as each other's Primary Beneficiary. Is co-owner same as annuitant? Yes ☐ No ☐
Name (First, Middle, Last) ☐ Male ☐ Female Birth Date (Mo - Day - Yr) SSN / TIN

Street Address **Address same as owner's?** ☐ Yes ☐ No City State ZIP
☐ U.S. Citizen ☐ Resident Alien/Citizen of:
☐ Non-Resident Alien/Citizen of: (Submit IRS Form W-8 (BEN, ECI, EXP or IMY))

The value from first name has changed from "Bob" to "Chris" in the carrier form.

Distributor form updated:

Page 1

Index Annuity Insurance Authorization Form

Index Annuity Insurance Authorization Form

Chase Insurance Agency, Inc.
Insurance and Annuities made available through Chase Insurance Agency, Inc. or affiliated agencies.

1. Primary Contract Owner (or annuitant if trust)

2. Joint Contract Owner

Citizenship Status (select one)
☐ USA
☐ Resident Alien (provide Country of Citizenship)

Name
Bob Johnson

Social Security or Tax ID Number
W

Date of Birth (mm/dd/yyyy)

Dependents

Gender (select one)
☐ Male ☐ Female

Marital Status (select one)
☐ Single ☐ Married

Primary Identification Type

Identification Number

ID Issue Date (mm/dd/yyyy)

ID State/Country

ID Expiration Date (mm/dd/yyyy)

Legal/Residential Address (no P.O. Box or "In Care Of" address)

City

State

Zip Code

Citizenship Status (select one)
☐ USA
☐ Resident Alien (provide Country of Citizenship)

Name

Social Security or Tax ID Number

Date of Birth (mm/dd/yyyy)

Dependents

Gender (select one)
☐ Male ☐ Female

Marital Status (select one)
☐ Single ☐ Married

Primary Identification Type

Identification Number

ID Issue Date (mm/dd/yyyy)

ID State/Country

ID Expiration Date (mm/dd/yyyy)

Legal/Residential Address (no P.O. Box or "In Care Of" address)

City

State

Zip Code

Although the value for Owner first name changed on the carrier form the original value remains on the distributor form; therefore, the answer in “No”. Carrier values will not affect distributor values if changed. This was an important note during our testing for Distributor to Carrier.

8.1 Test Cases

To effectively test the Distributor to Carrier Mappings we created an XML test plan spreadsheet. This will assist testers with testing the Distributor to Carrier mappings effectively.

Test Cases					
1. The Master RuleSet and master hidden form will live in the carrier packages and will be deployed to distribution.					
2. In the distributor, if UseCarrierMapping=true, then the below tests should pass if the distributor has these tags. (this flag will only be set for new distributors using the common tags and common list values. This will ensure that old mapping is not impacted by the new mapping.)					
3. UseCarrierMapping=false or null, then the below tests should fail, regardless of the distributor tags.					
4. Test the below mapping with the implementation specs for the carrier and distributor to ensure the carrier and distributor rules are still honored.					
Group	From Dataitem	From Value	To Dataitem	To Dataitem Value	Pass/Fail
Owner_NonNaturalName	D_Owner_NonNaturalName		PRIMARY_OWNER_ENTITY_NAME		Pass
Owner_ResidentialAddress1	D_Owner_ResidentialAddress1		PRIMARY_OWNER_ADDRESS_LINE1		Pass
Owner_ResidentialAddress_City	D_Owner_ResidentialAddress_City		PRIMARY_OWNER_ADDRESS_CITY		Pass
Owner_ResidentialAddress_State	D_Owner_ResidentialAddress_State		PRIMARY_OWNER_ADDRESS_STATE		Pass
Owner_ResidentialAddress_Zipcode	D_Owner_ResidentialAddress_Zipcode		PRIMARY_OWNER_ADDRESS_POSTAL_CODE		Pass
Owner_Home_PhoneNumber	D_Owner_Primary_PhoneNumber		PRIMARY_OWNER_PHONE_FORMATTED		Pass
Owner_Personal_EmailAddress	D_Owner_Personal_EmailAddress		PRIMARY_OWNER_EMAIL		Pass
Owner_DOB	D_Owner_DOB		PRIMARY_OWNER_DATE_FORMATTED		Pass
Owner_Citizen_NonUS_Country	D_Owner_Citizen_NonUS_Country		PRIMARY_OWNER_RESIDENCY_RESIDENT_TEXT		Pass
Owner_SSN	D_Owner_SSN		PRIMARY_OWNER_TAX_ID		Pass
Owner_ResidentialAddress2	D_Owner_ResidentialAddress2		PRIMARY_OWNER_ADDRESS_LINE2		Pass
AdditionalAgent2_FullName	D_AdditionalAgent2_FullName		AGENT_2_FULL_NAME_APP		Pass
AdditionalAgent3_FullName	D_AdditionalAgent3_FullName		AGENT_3_FULL_NAME_APP		Pass
AdditionalAgent4_FullName	D_AdditionalAgent4_FullName		AGENT_4_FULL_NAME_APP		Pass
AdditionalAgent5_FullName	D_AdditionalAgent5_FullName		AGENT_5_FULL_NAME_APP		Pass
Agent_FullName	D_Agent_FullName		AGENT_OF_RECORD_FULL_NAME_APP		Pass
JointOwner_ResidentialAddress_City	D_JointOwner_ResidentialAddress_City		JOINT_OWNER_ADDRESS_CITY		Pass
JointOwner_ResidentialAddress1	D_JointOwner_ResidentialAddress1		JOINT_OWNER_ADDRESS_LINE1		Pass
JointOwner_ResidentialAddress_Zipcode	D_JointOwner_ResidentialAddress_Zipcode		JOINT_OWNER_ADDRESS_POSTAL_CODE		Pass

As shown above, this test plan will show the following:

1. The Master RuleSet and master hidden form live in the carrier packages and are deployed to distribution.
2. In the distributor, if UseCarrierMapping=true, then the below tests should pass if the distributor has these tags. (This flag will only be set for new distributors using the common tags and common list values. This will ensure that old mapping is not impacted by the new mapping.)
3. UseCarrierMapping=false or null, then the below tests should fail, regardless of the distributor tags.
4. Test the below mapping with the implementation specs for the carrier and distributor to ensure the carrier and distributor rules are still honored.

Group-The name of the group selected by the user to separate mapping rules

From Dataitem- The Distributor dataitem

From Value- The Distributor List Value

To Dataitem- The Carrier dataitem

To Dataitem value- The Carrier List Value

Pass/Fail- Did this mapping Pass or Fail the test

Comment- Any comments that were noted from the tester

8.2 Developer Notes

- A “common hidden mapping form” should be added in all products/packages in all carriers.
- A “common mapping ruleset” should be added in all products/packages in all carriers.
- Mapping from “common hidden mapping form” to “Carriers forms” should be tested for all products/packages in all carriers.
- “Common mapping ruleset” will trigger only if “UseCarrierMapping” tag = “True”—we will set it “True” in distributor instance only for new distributors.
- When products/packages from carrier will deploy to a distributor, “common hidden mapping form” and “common mapping ruleset” will automatically deploy into the distributor.
- Form team will need to do nothing for mapping from Distributor to carrier except set “UseCarrierMapping = True”.
- We have noticed in our testing that the Generate Mapping Ruleset will give incorrect rules in cases that the data item is the same, but the list value is different. For example, D_Owner_Gender is found twice on the download tag list. Once for Male and once for Female. Currently the conversion tool is not separating the values and gives an incorrect rule. This issue will need to be adjusted manually. (NEED TO TEST TO VERIFY THIS IS STILL AN ISSUE.)

Example of an Incorrect Rule:

```
161 </RuleDef>
162 <RuleDef>
163   <ScriptCode>
164     <if>
165       <condition>
166         <compare op="==">
167           <const value="IT Training" />
168           <diget dataitemid="PLI_PRODUCT_CARRIER_NAME" />
169         </compare>
170       </condition>
171     </if>
172     <condition>
173       <getcontrolstate dataitemid="PRIMARY_OWNER_SEX_MALE_X" />
174     </condition>
175     <if>
176       <condition>
177         <compare op="==">
178           <diget dataitemid="D_Owner_Gender" />
179           <const value="1" />
180         </compare>
181       </condition>
182       <diset dataitemid="PRIMARY_OWNER_SEX_MALE_X">
183         <const value="TRUE" />
184       </diset>
185     </elseif>
186     <compare op="==">
187       <diget dataitemid="D_Owner_Gender" />
188       <const value="2" />
189     </compare>
190   </elseif>
191   <diset dataitemid="PRIMARY_OWNER_SEX_MALE_X">
192     <const value="TRUE" />
193   </diset>
194 </if>
195 </if>
196 </ScriptCode>
197
```

Example of a Good Rule to Use for Owner_Gender:

<block>

<if>

<condition>

<compare op="==">

<diget dataitemid="D_JointOwner_Gender" />

<const value="1" type="String" />

</compare>

<getcontrolstate dataitemid="JOINT_OWNER_SEX_MALE_X" />

<diget dataitemid="USE_CARRIER_MAPPING" type="Boolean" />

</condition>

<diset dataitemid="JOINT_OWNER_SEX_MALE_X">

```

    <const value="true" type="String" />
  </diset>
<elseif>
  <compare op="==">
    <diget dataitemid="D_JointOwner_Gender" />
    <const value="2" type="String" />
  </compare>
  <getcontrolstate dataitemid="JOINT_OWNER_SEX_FEMALE_X" />
<diget dataitemid="USE_CARRIER_MAPPING" type="Boolean" />
</elseif>
<diset dataitemid="JOINT_OWNER_SEX_FEMALE_X">
  <const value="true" type="String" />
</diset>
</if>
</block>

```

Mapping from Combo Box to Text Box:

When mapping from a combo box to a text box a custom rule will need to be used in order for the List values to map correctly. Below is an example of a Country mapping rule from combo box to text box:



MapCountry.txt