



This TechNote details the updated Premium Detail tab with a fresh look and functionality, introducing Premium History and a Duration field.

## Premium Detail

The updated Premium Detail tab is divided into three sections, which are as follows:

- Premium / Est. Annualized Comm.
- Class / substandard / Cash with App
- Premium History

### Premium / Est. Annualized Comm.

The Premium and Estimated Annualized commissions details are displayed in the first section. The UI refresh includes a cleaner look with a larger font size, a modern feel, and a new Duration field.

The Notes panel remains fixed at the base of the screen and seamlessly moves along with the user as they explore different sections of the detail.

The screenshot shows the 'Premium Detail' tab selected in the top navigation bar. The interface is divided into several sections:

- Premium / Est. Annualized Comm.**: This section includes a 'Mode' dropdown set to 'Monthly', a 'Duration' dropdown set to '30 year' (highlighted with a red box), and a 'Planned Modal Premium' field showing '8.23'.
- Class / Substandard / Cash With App**: A section for selecting the policy class.
- Premium History**: A section for viewing the history of premiums.
- Annual Premium**: A field showing '94.06'.
- Target Premium**: A field for setting the target premium.
- 1035 Exchange**: A field for the 1035 exchange value.
- Dump-in/Lump Sum**: A field for the lump sum amount.
- Special Rider**: A field for the special rider.
- Special Fees**: A field for special fees.
- One Time Fees**: A field for one-time fees.
- Received**: A field with a calendar icon for recording the date received.
- Qualified Rollover**: A field for the qualified rollover amount.
- Qualified Transfer**: A field for the qualified transfer amount.
- Non-Qualified Transfer**: A field for the non-qualified transfer amount.
- Est. Annualized Commission**: This section includes:
  - Base Premium**: A field showing '46.26'.
  - Excess Premium**: A field for the excess premium.
  - Special Rider**: A field for the special rider.
  - Policy Fees**: A field for policy fees.
  - Special Fees**: A field for special fees.
  - One Time Fees**: A field for one-time fees.
  - Policy Fee Amount**: A field showing '50.00'.
  - Waive Policy Fee**: A checkbox.
  - Commissionable**: A checkbox.
- Calculator Disabled**: A checkbox at the bottom left.
- Notes**: A text area at the bottom for adding notes.

## Duration field options:

- Life Pay
- Pay to 65
- 5 pay
- 7 Pay
- 10 Pay
- 15 year
- 20 year
- 25 Year
- 30 year
- 35 Year
- 40 Year

## Class / substandard / Cash with App

The class substandard and cash with app section has the same fields, but with a fresh look and feel.

The screenshot shows a web form titled 'Premium Detail' with several tabs: Premium Detail, Life Detail, Comments, Requirements, Additional Detail, Memos, Agent (1), Related Apps, Commission Summary, Commission - Estimated, and Payments. The 'Premium Detail' tab is active. On the left, there's a sidebar with 'Premium / Est. Annualized Comm.' and 'Premium History'. The main area is divided into three columns. The first column has a dropdown for 'Class / Substandard / Cash With App' (currently showing 'Preferred'). The second column has dropdowns for 'Approved Tobacco' (Nonsmoker), 'Approved Rate Class' (Preferred), 'Applied For Tobacco' (Nonsmoker), and 'Applied For Rate Class' (Standard). The third column has dropdowns for 'Payment Method' (Electronic Funds), 'Flat Extra Amount', 'Flat Extra Duration', 'Table Rating', 'Table Rating %', 'Issue Type' (Full Underwriting), 'Cash With App Amount' (3,000.00), and 'Cash With App Refund Date' (01/04/2024). There's also a 'Notes' field at the bottom right and a 'Calculator Disabled' checkbox on the left.

## Premium History

A new section has been added to track changes in Premium Fields with a Before and After value by Status. The initial entries will not have a before date and will be considered the "Applied for" premium. The final change recorded in the history and reflected on the case will be considered the "Approved" premium.

## Applied For Premium:

Premium Detail
Life Detail
Comments
Requirements
Additional Detail
Memos
Agent (1)
Related Apps
Commission Summary
Commission - Estimated
Payments

Premium / Est. Annualized Comm.

Class / Substandard / Cash With App

Premium History

Field	Before Value	After Value	Application Status	Modified	User
Base Premium		7,200.00	App. Submitted	02/16/2024 at 12:43PM MST	HELP399
Modal Premium		600.00	App. Submitted	02/16/2024 at 12:43PM MST	HELP399

☐ Calculator Disabled
 Notes

## Approved Premium:

Premium Detail
Life Detail
Comments
Requirements
Additional Detail
Memos
Agent (1)
Related Apps
Commission Summary
Commission - Estimated
Payments

Premium / Est. Annualized Comm.

Class / Substandard / Cash With App

Premium History

Field	Before Value	After Value	Application Status	Modified	User
Base Premium	7,200.00	9,600.00	Approved	02/16/2024 at 12:45PM MST	HELP399
Modal Premium	600.00	800.00	Approved	02/16/2024 at 12:45PM MST	HELP399
Base Premium		7,200.00	App. Submitted	02/16/2024 at 12:43PM MST	HELP399
Modal Premium		600.00	App. Submitted	02/16/2024 at 12:43PM MST	HELP399

☐ Calculator Disabled
 Notes