

This TechNote describes a priority of Special can now be assigned to Requirements on Applications, Licenses, and Appointments. Available after our release on August 18, 2018.

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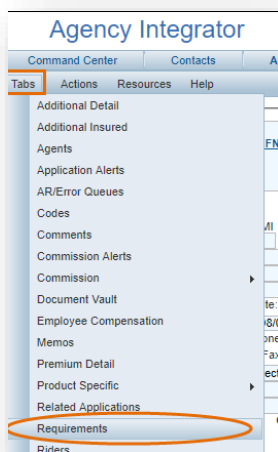
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Access Requirements

You can add a priority of **Special** to a requirement by first accessing Applications, Licenses, or Appointments.

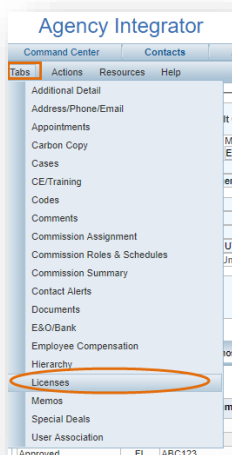
Access Application Requirements

From the **Application Detail** screen click **Tabs** from the navigation bar, then select **Requirements**.



Access License Requirements

From the **Contact Detail** click **Tabs** from the sub-menu, then select **Licenses**.



Select **Requirement** tab once on the **License Detail**.

The screenshot shows the 'License Detail' form for Agent Bradford, Addison E. The 'Requirements' tab is selected and highlighted with a red box. The form includes fields for State (CA), Effective date, Expires date, Number, Var. Number, Status (License Required), and Corporate checkbox. It also has a Notes section with 'Auto-Generated' text, a Custom Fields section with Marketing and Contracting dropdowns, and a Lines of Business section with checkboxes for All Lines, Life, Annuity, Disability, Health, Long-term Care, and Life Settlement. The bottom section shows a table with columns: Description, Received, Ordered, Follow-up, Carr Rcvd, and Notes. The table contains one row for 'Agent Signature' with dates 08/17/2018 and 08/24/2018. A red text note states: '* Requirements designated as Special will be highlighted with red text.'

Appointment Access

From the **Contact Detail** click **Tabs** from the sub-menu, then select **Appointments**.

The screenshot shows the 'Agency Integrator' menu. The 'Tabs' option is highlighted with a red circle, and the 'Appointments' option is also highlighted with a red circle. Other options in the menu include Command Center, Contacts, Actions, Resources, Help, Additional Detail, Address/Phone/Email, Carbon Copy, Cases, and CE/Training.

Select **Requirement** tab once on the **Appointment Detail**.

The screenshot shows the 'Appointment Detail' form for Agent Bradford, Addison E. The 'Requirements' tab is selected and highlighted with a red box. The form includes fields for Carrier (Allianz Life Insurance Company of North America), Number, Effective date, Expires date, Status (Pending with Agent), Organization (All Organizations), Hierarchy (Not Applicable), and Corporate checkbox. It also has a Notes section with 'Auto-Generated' text, a Custom Fields section with Appointment contracting dropdown, and a Lines of Business section with checkboxes for All Lines, Life, Annuity, Disability, Health, Long-term Care, and Life Settlement. The bottom section shows a table with columns: Description, Received, Ordered, Follow Up, Carr Rcvd, and Notes. The table contains two rows: 'Carrier Contracting Forms' and 'Copy of FL State License', both with dates 09/08/2016 and 09/15/2016. A red text note states: '* Requirements designated as Special will be highlighted with red text.'

Add Requirement Priority

To add the Priority of special to a requirement. Click an individual Requirement, or the system will allow you to multi-select more than one requirement (Ctrl + Click), right-click and select **Prioritize as special**.

Prop. Insured	Description	Req Of	Received	Ordered	Carr Rcvd	Follow-up	Notes	Vendor	Event
Wissel, Mergy	Application-Fillable	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Blood Profile	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Blood/HOS	Agent		08/17/2018		08/24/2018		Place Order	
General	Carrier Contracting Forms	Agent		08/17/2018		08/24/2018		Place Order	
General	Copy of UT Non-Res State License	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Death Benefit Disclosure	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	HIV Consent	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Inspection Report	MGA		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	EFT Payment Options form	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Home Office Urine Specimen	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Inspection Report - Business	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Medical Exam	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Motor Vehicle Report	Carrier		08/17/2018		08/24/2018		Place Order	

Add Requirement Generate Requirements * Requirements designated as Special will be highlighted with red text.

Sorting will change when **Prioritize as Special** is added. Requirements with special priority will display in red text on top followed by Outstanding, Received, then Cancelled.

Prop. Insured	Description	Req Of	Received	Ordered	Carr Rcvd	Follow-up	Notes	Vendor	Event
Wissel, Mergy	Application-Fillable	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Blood Profile	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Blood/HOS	Agent		08/17/2018		08/24/2018		Place Order	
General	Carrier Contracting Forms	Agent		08/17/2018		08/24/2018		Place Order	
General	Copy of UT Non-Res State License	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Death Benefit Disclosure	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	HIV Consent	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Inspection Report	MGA		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	EFT Payment Options form	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Home Office Urine Specimen	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Inspection Report - Business	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Medical Exam	Agent		08/17/2018		08/24/2018		Place Order	
Wissel, Mergy	Motor Vehicle Report	Carrier		08/17/2018		08/24/2018		Place Order	

Add Requirement Generate Requirements * Requirements designated as Special will be highlighted with red text.

Receiving a special requirement

Receiving a requirement Prioritized as Special will automatically remove the special priority and drop the requirement to the bottom of the list.

Premium Detail	Life Detail	Comments	Requirements	Codes	Additional Detail	Additional Insured (0)	Memos	Agent (1)	Commission Summary	Commission - Estimated	Commission - Actual
Prop. Insured	Description	Req Of	Received	Ordered	Carr Rcvd	Follow-up	Notes	Vendor	Event		
Wissel, Mergy	Death Benefit Disclosure	Agent	08/17/2018			08/24/2018		Place Order			
Wissel, Mergy	HIV Consent	Agent	08/17/2018			08/24/2018		Place Order			
Wissel, Mergy	EFT Payment Options form	Agent	08/17/2018			08/24/2018		Place Order			
Wissel, Mergy	Home Office Urine Specimen	Agent	08/17/2018			08/24/2018		Place Order			
Wissel, Mergy	Inspection Report - Business	Agent	08/17/2018			08/24/2018		Place Order			
Wissel, Mergy	Medical Exam	Agent	08/17/2018			08/24/2018		Place Order			
Wissel, Mergy	Motor Vehicle Report	Carrier	08/17/2018			08/24/2018		Place Order			
Wissel, Mergy	NAIC Replacement	Agent	08/17/2018			08/24/2018		Place Order			
Wissel, Mergy	Paramedical Exam	Agent	08/17/2018			08/24/2018		Place Order			
Wissel, Mergy	Release of Health-Related Info (H	Agent	08/17/2018			08/24/2018		Place Order			
Wissel, Mergy	Request and Authorization for Ele	Agent	08/17/2018			08/24/2018		Place Order			
Wissel, Mergy	Resting EKG	Agent	08/17/2018			08/24/2018		Place Order			
Wissel, Mergy	Inspection Report	MGA	08/17/2018			08/24/2018		Place Order			
Add Requirement Generate Requirements * Requirements designated as Special will be highlighted with red text.											

Command Center

Requirements **Prioritized as Special** will display in red in the Command Center. When there is more than one requirement to be followed up on per application, appointment, license, etc., there is an indicator in parentheses.

Command Center								
From: 05/19/2018	To: 08/31/2018	User: Bradford, Anna (ABRADFORD)	Reset					
Name	Due/Foll up	Type	Carrier	Status	Detail	Agent (Application)	Policy Number	State
Wissel, Mergy	08/24/2018	App Req	Banner Life	App. Submitted	Requirement Follow-up (18)	KIRK, HAEFNER		UT

Report Builder

You can report on requirements **Prioritized as Special** in Report Builder using **App Info – Requirements** data group.

Available Data Groups

Agent Info

Agent Info - Appointments

Agent Info - CE/Training

Agent Info - Codes

Agent Info - Comments

Agent Info - Hierarchies

Agent Info - Licensing

App Info

App Info - Agents

App Info - Agents w/ Split Premium

App Info - Aging

App Info - Codes

App Info - Comments

App Info - Informal Quotes

App Info - Requirements

Commission - Actuals

Commission - Estimates

ECP info

Users

Data Group: App Info - Requirements

Select this group to build Application Requirement Reports. Default columns include: Application ID, Applicant Name, Carrier, Plan, Policy Number, Face Amount, Required of, Requirement Code Description, Requirement Status and Agent Name. Default criteria include: Organization, Carrier, Case Status Category, Status, Required Of, Requirement Status

Sample Report Preview:

Application ID	Applicant Name	Carrier	Plan	Policy Number	Face Amount	Required Of	Requirement Code Description	Requirement Status	Requirement Type	Agent Name
101897	Straw, Ben	American General	Informal-10 year	1001897	100,000.00	MGA	ADDC - Accelerated Death Benefit	Outstanding	Underwriting	Allen, Terry
107698	Anderson, Melissa	Banner	Informal-10 year	1077281A	500,000.00	Agent	ADDC - Accelerated Death Benefit	Outstanding	Underwriting	Travis, Dale
18378	Hillman, Thomas	American General	Informal-Annuity	208218938959	1,500,000.00	Agent	EFT - EFT Payment Options Form	Received	Underwriting	Bridges, John
8922	Avila, Tina	Banner	Informal-20 year	28737	1,500,000.00	Agent	HSPAA - Release of Health Related Info	Outstanding	Underwriting	Travis, Dale
107898	Perkins, Mary	Banner	Informal - Life	1067478162	200,000.00	Vendor	ADDC - ADCN Consent Form	Outstanding	Underwriting	Quinn, Eric

Select **Priority** as Criteria, Grouping, Column or Summary.

Report Name: Requirement Priority Title: Logo: select...

Columns

Quick Find: Drag columns to criteria, preview, summaries.

- App Info - Requirements
 - Address Info
 - Agent Application Info
 - Basic Info
 - Custom Fields
 - Hierarchies
 - Other Criteria
 - Other Groups
 - Phone Info
 - Premium Info
 - Requirements
 - Agency Ordered Req Date
 - Agency Received Req Date
 - Follow-up Date
 - Priority**
 - Required For
 - Required Of
 - Requirement Code Description
 - Requirement Note
 - Requirement Status
 - Requirement Type
 - Vendor Name
 - Vendor Order ID

Criteria Remove All Criteria

Carrier X Organization X Status X Status Category X Required Of X Requirement Status X

Preview Remove All Columns Relabel Columns Reset Sorting

Drop groups here.

Application ID X	Applicant Name X	Carrier X	Plan X	Policy Number X	Face Amount X	Required Of X	Requirement C
No data.							
<input type="checkbox"/> Wrap	<input type="checkbox"/> Wrap	<input type="checkbox"/> Wrap	<input type="checkbox"/> Wrap	<input type="checkbox"/> Wrap	<input type="checkbox"/> Wrap	<input type="checkbox"/> Wrap	<input type="checkbox"/> Wrap
					<input type="checkbox"/> Subtotal		
					<input type="checkbox"/> Average		

☐ Include Record Count and Grand Totals (PDF only) PDF End of Page (Landscape)

Summaries (PDF reports)

Drop summaries here.

OK Apply Cancel

Data Replicator

Users with administrative access will need to manually add Priority to the list of fields to be included in their data replicator file.

Application Requirements

REQFLE table located in the **Application** tab of the Data Replicator Admin.

REQFLE Select All Unselect All (Application requirements)

Selected	Name	Custom Name	Data Type	Description
<input type="checkbox"/>	REOREQID		bigint	Primary Key
<input type="checkbox"/>	CASEID		bigint	Foreign key to CASE
<input type="checkbox"/>	REQOF		Varchar(128)	Requirement required of (AG = Agency, US = MGA, CO = Carrier)
<input type="checkbox"/>	REQINS		bigint	Insured that the requirement is for when there is more than one insured
<input type="checkbox"/>	REQCODE		Varchar(128)	Requirement Code
<input type="checkbox"/>	REQDESC		Varchar(128)	Requirement code description
<input type="checkbox"/>	REQTYP		Varchar(128)	Requirement type (D = Delivery, U = Underwriting, L = License, Q = Questionnaire)
<input type="checkbox"/>	REQDATE		Date	Requirement ordered date
<input type="checkbox"/>	FOLDATE		Date	Follow Up Date
<input type="checkbox"/>	RECDATE		Date	Requirement received date
<input type="checkbox"/>	REQTEID		bigint	Foreign key to INFGTEP (IQQTEID)
<input type="checkbox"/>	REQCRTDT		Date	Requirement create date
<input type="checkbox"/>	REQCRTTM		Time	Requirement create time
<input type="checkbox"/>	REQCARORD		Date	Requirement carrier ordered date
<input type="checkbox"/>	REQCARREC		Date	Requirement carrier received date
<input type="checkbox"/>	TSKCMPLG		Varchar(128)	System internal identifier - do not use
<input type="checkbox"/>	TSKCMPLDTE		Date	System internal identifier - do not use
<input type="checkbox"/>	RCVCHGDT		Date	Requirement waived
<input type="checkbox"/>	REQWAIV		Varchar(128)	Requirement waived flag - not in use
<input type="checkbox"/>	LICID		bigint	Foreign key to LICENS (LICENSID)
<input type="checkbox"/>	REQTYPE		Varchar(128)	Type of requirement (R = Requirement, F = Form)
<input type="checkbox"/>	FORMSID		bigint	Forms ID - System internal identifier
<input type="checkbox"/>	CHGDATE		Date	Last changed date
<input type="checkbox"/>	CHGBY		Varchar(128)	Last changed user
<input type="checkbox"/>	CRTBY		Varchar(128)	Created By user
<input type="checkbox"/>	RECTIME		Time	Received Time
<input type="checkbox"/>	GPDETAILID		bigint	Foreign key to GPDETAIL
<input type="checkbox"/>	CHGTIME		Time	Last changed time
<input type="checkbox"/>	ROSTATUSID		bigint	Status of the Requirement (3 = Waived, 4 = Outstanding, 7 = Received, 8 = Cancelled)
<input type="checkbox"/>	STCHGDT		Date	Status changed date
<input type="checkbox"/>	DOCID		bigint	Document Vault ID
<input type="checkbox"/>	UNIQID		Varchar(128)	Carrier Unique ID
<input type="checkbox"/>	REQSYSID		Varchar(128)	Requirement Info System Key
<input type="checkbox"/>	REQNOTE		Note(32,767)	Requirement Note
<input checked="" type="checkbox"/>	PRIORITY		Integer	Priority

License Requirements

LICREQ table located in the **Contact Management** tab of the Data Replicator Admin.

LICREQ Select All Unselect All (Requirement associated with licenses)

Selected	Name	Custom Name	Data Type	Description
<input type="checkbox"/>	LICREQID		bigint	Primary Key
<input type="checkbox"/>	LICENSID		bigint	Foreign key to LICENS
<input type="checkbox"/>	FORMSID		bigint	Forms ID - System internal identifier
<input type="checkbox"/>	REQCODE		Varchar(128)	Requirement Code
<input type="checkbox"/>	REQTYP		Varchar(128)	Requirement type (D = Delivery, U = Underwriting, L = License, Q = Questionnaire)
<input type="checkbox"/>	DESCR		Varchar(128)	License Requirement description
<input type="checkbox"/>	RECEIVED		Date	Received Date
<input type="checkbox"/>	ORDERED		Date	Ordered Date
<input type="checkbox"/>	FOLLOWUP		Date	Follow Up Date
<input type="checkbox"/>	CARORDER		Date	Carrier ordered date
<input type="checkbox"/>	CARECEIV		Date	Carrier received date
<input type="checkbox"/>	CHGDATE		Date	Last changed date
<input type="checkbox"/>	CHGTIME		Time	Last changed time
<input type="checkbox"/>	CHGBY		Varchar(128)	Last changed user
<input type="checkbox"/>	CRTDATE		Date	Created date
<input type="checkbox"/>	CRTTIME		Time	Time created
<input type="checkbox"/>	CRTBY		Varchar(128)	Created By user
<input checked="" type="checkbox"/>	PRIORITY		Integer	Priority

Appointment Requirements

LAPREQ table located in the **Contact Management** tab of the Data Replicator Admin.

LAPREQ (Requirement associated with appointments)

Selected	Name	Custom Name	Data Type	Description
<input type="checkbox"/>	LAPREQID		bigint	Primary Key
<input type="checkbox"/>	LICAPPID		bigint	Foreign key to LICAPP
<input type="checkbox"/>	FORMSID		bigint	Forms ID - System internal identifier
<input type="checkbox"/>	REQCDE		Varchar(128)	Requirement Code
<input type="checkbox"/>	REQTYP		Varchar(128)	Requirement type (D = Delivery, U = Underwriting, L = License, Q = Questionnaire)
<input type="checkbox"/>	DESCR		Varchar(128)	Appointment description
<input type="checkbox"/>	STATE		Varchar(128)	State Specific
<input type="checkbox"/>	RECEIVED		Date	Received Date
<input type="checkbox"/>	ORDERED		Date	Ordered Date
<input type="checkbox"/>	FOLLOWUP		Date	Follow Up Date
<input type="checkbox"/>	CARORDER		Date	Carrier ordered date
<input type="checkbox"/>	CARECEIV		Date	Carrier received date
<input type="checkbox"/>	CHGDATE		Date	Last changed date
<input type="checkbox"/>	CHGTIME		Time	Last changed time
<input type="checkbox"/>	CHGBY		Varchar(128)	Last changed user
<input type="checkbox"/>	CRTDATE		Date	Created date
<input type="checkbox"/>	CRTTIME		Time	Time created
<input type="checkbox"/>	CRTBY		Varchar(128)	Created By user
<input checked="" type="checkbox"/>	PRIORITY		Integer	Priority