I&RS Review Board

ENHANCEMENT REQUEST FORM

Note: Do not complete gray shaded

Submission Date: 05/06/13
Request Number: IPS00444

Name/Phone #/E-mail Address:
Income Product Working Group

Requesting Company Name(s): Income Product Working Group

Type of Change:
_____ New

_____ Mod to Existing

_____ Legal Requirement

Priority:

_____ Low (can wait until next release)

_____ Medium (Sooner than next release)

_____ High (Immediate action)

Application:

_____ ACATS/IPS

_____ Access Platforms

_____ Asset Pricing (AAP)

_____ Applications/Sub Pay (APP/SUB)

_____ Attachments (ATT)

_____ Commissions (COM)

_____ Financial Activity Reporting (FAR)

_____ Fund Transfers (FTR)

_____ InForce Transactions (IFT)

_____ Licensing & Appointments (LNA)

_____ Positions and Valuations (POV)

_____ Replacements (RPL)

Date Reviewed by Board: May 7, 2013
Decision Date:

1) Overall Scope of the Enhancement (should include the Business Reason for the change):

The Income Product Working Group proposed adding Deferred Income Annuity as a new product to the Product Type Code list on COM, POV, FAR and APP/SUB.
2) **Recommended Record Layout Changes:**

*Add DIA - Deferred Income Annuity to Product Type Code List*

- APP/SUB – item #4442
- COM – item #2076
- FAR – item #5139
- POV – item #3025

3) **Business Scenario – (Used to determine Best Practices)**

4) **Standard Usage – (Should include specific field/code usage)**

5) **Status Update:**

First we determined DIA is a product and not a service feature. Next we discussed if a code currently exists to capture these products. It was determined one does not currently exist and this will be added to the Product Type Code list on the 4 products.

Also the descriptions for FIX and VAR will be clarified to include deferred.

*Approved for the March 2014 release*
## Revision History

<table>
<thead>
<tr>
<th>Date</th>
<th>By</th>
<th>Version</th>
<th>Description</th>
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<tbody>
<tr>
<td>05/06/2013</td>
<td>Jon Volpe</td>
<td>0.1</td>
<td>Added Enhanc# and Review Date</td>
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<tr>
<td>05/07/2013</td>
<td>Jon Volpe</td>
<td>1.0</td>
<td>Updated status</td>
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