**I&RS Review Board**

**ENHANCEMENT REQUEST FORM**

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<tr>
<th>Note: Do not complete gray shaded</th>
<th>Request Number: IPS00462</th>
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**Submission Date:** 03/07/2014  
**Name/Phone #/E-mail Address:**  
Frank Norton /949-219-7607

**Requesting Company Name(s):**  
Pacific Life

**Type of Change:**  
_____ New  
_____ Mod to Existing  
_____ Legal Requirement

**Priority:**  
__X__ Low (can wait until next release)  
_____ Medium (Sooner than next release)  
_____ High (Immediate action)

**Application:**

_____ ACATS/IPS  
_____ Access Platforms  
_____ Asset Pricing (AAP)  
**____X** 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)

*For ATT, IFT and LNA please check the Access box if you want changes to be made to that platform as well.

| Date Reviewed by Board: April 1, 2014 | Decision Date: May 13, 2014 |

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

Add a new Date Qualifier to the App-Sub codes list for “Illustration Date”
2) **Recommended Record Layout Changes:**

No Record Layout changes, Code Value Only.

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

For Payout products - Our rate lock process is tied to several dates including the “Illustration Date”. Currently we do not get the “Illustration Date” on the App-Sub file.

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

For SPIA/DIA Products – Pass the Illustration Date from the order entry platforms to the Carrier by using this new data qualifier.

5) **Status Update:**

Tentatively approved for September 2014. Frank not able to make the call. Will re-review next meeting

Re-reviewed during May meeting. Approved for September 2014.

**Revision History**

<table>
<thead>
<tr>
<th>Date</th>
<th>By</th>
<th>Version</th>
<th>Description</th>
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<tbody>
<tr>
<td>3/27/14</td>
<td>Jon Volpe</td>
<td>0.1</td>
<td>Added req# and review date</td>
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<tr>
<td>05/13/14</td>
<td>Jon Volpe</td>
<td>1.0</td>
<td>Updated status and approval date</td>
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