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# INSURANCE AND RETIREMENT SERVICES CODE LIST MODIFICATIONS

**PUBLICATION DATE:**

March 2020

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## CODE LIST MODIFICATIONS

This document provides the detailed modifications made to the I&RS code lists as part of the bi-monthly code list edits. These modifications are based on submitted recommendations made by I&RS participants. All modifications were reviewed and approved by the I&RS Review Board.

The enhancement requests can be found in the Participant Section of our website (<http://www.dtcc.com/products/insurance>) under Enhancements, and then Current Release. The enhancement numbers are listed (IPS00###) next to each request in this document.

### Product(s) Included in this EDIT RELEASE

COM

#### Test & Production

Code lists will be updated in PSE on Thursday, March 12<sup>th</sup> and in Production on Thursday, March 19<sup>th</sup>.

#### Scheduled Code List Edits

Updated Record Layout documentation will be available on the [I&RS website](#).

## COMMISSIONS (COM)

### IPS00641 – COM – Add CBRC Codes

On Contract Record #1 (22/01) add the following codes to the Commission Basis Reason Code List (item #2060) under Life Products Payments and Chargebacks:

Payments:

- **PTC** – Total Compensation Reached State Specified Target Level
- PEL – Total Compensation Reached State Specified Excess Level

Chargebacks:

- **CTC** – Chargeback for Total Compensation Reached State Specified Target Level
- CEL – Chargeback for Total Compensation Reached State Specified Excess Level

## Document Revision History

Date	Author	Version	Change Description
2/10/2020	Jovani Munoz	1.0	Draft
2/27/2020	Jovani Munoz	2.0	Final Draft – Updated codes and descriptions