

Appendix 3 - SegmentName Configuration

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SegmentName

Description

SegmentName dictates how the Segment(s) are configured for each Plan. It is configured similar to Screen rules but allows for additional validations and can invoke 'Calculate' Business Rules.

SegmentName Element\Attribute Table

1.1 Element\Tag	1.2 Attribute\Definition\Value\DataType
Segment	
<Fields>	Screen Entry Fields. See Field Section of the Transaction Configuration document for details.
<Buttons>	List of Buttons that can be selected on the Screen.
<Button>	Name of the available Button. If multiple buttons they are listed separately in individual <Button> tags.
	RULE CalculateGeneral rule that is invoked when the Calculate button is selected.
<Expression>	On screen validations which use javascript to evaluate condition, see Expression Section of the Transaction Configuration section for details.
<Validation>	On screen validations, see Validation Section of the Transaction Configuration section for details.
<PolicyRoles>	In addition to Validations applicable to Transactions verification of the existence of PolicyRoles is allowed
<Role>	Code (as defined in AsCodeRole). Identifies Role that must be present for validation.

Example of SegmentName XML

```

<Segment>
  <Fields>
    <Field>
      <Name>SegmentActiveCode</Name>
      <Display>Segment Status</Display>
      <DataType>Combo</DataType>
      <DefaultValue>02</DefaultValue>
      <Hidden>No</Hidden>
      <Disabled>Readonly</Disabled>
      <Query TYPE="SQL">SELEct  CodeValue,  LongDescription FROM AsCode WHERE CodeName =
'AsCodeStatus' ORDER BY CodeValue</Query>
    </Field>
    <Field>
      <Name>SegmentIssueDate</Name>
      <Display>Issue Date</Display>
      <DataType>Date</DataType>
      <Disabled>Readonly</Disabled>
    </Field>
    <Field>
      <Name>SegmentTerminationDate</Name>
      <Display>Termination Date</Display>

```

```

        <DataType>Date</DataType>
        <Disabled>Readonly</Disabled>
    </Field>
    <Field>
        <Name>SegmentMaturityDate</Name>
        <Display>Maturity Date</Display>
        <DataType>Date</DataType>
        <Disabled>Readonly</Disabled>
    </Field>
    <Field>
        <Name>Filler</Name>
        <Display>
        <DataType>Blank</DataType>
    </Field>

    <Buttons>
        <Button RULE="CalculateGeneralLifeBaseCov">Calculate</Button>
    </Buttons>
    <!--      <Button>Save</Button>  -->
    <Expressions>
        <!-- Expression Format (false expression) -->
        <!-- check for valid face amount -->
        <Expression MESSAGE="Issue Face Amount has a Minimum requirement of
$50,000.00">document.frmS3Segment.txtSegmentInitCovAmt.value >= 50000</Expression>
        <Expression MESSAGE="Issue Face Amount has a Maximum requirement of
$25,000,000.00">document.frmS3Segment.txtSegmentInitCovAmt.value <= 25000000</Expression>
        <!-- limit to one base segment -->
        <Expression MESSAGE="Only one base layer of coverage can be added to policy at
issue.">document.frmS3Segment.txtBaseCount.value == 0 || document.frmS3Segment.txtSegmentSequenceNumber.value ==
1</Expression>
        <Expression MESSAGE="Underwriting Class of Preferred Plus is not available if Tobacco Use denotes
Smoker.">(document.frmS3Segment.cmbSegmentUWClass.value != '03') || (document.frmS3Segment.cmbSegmentTobaccoPremBasis.value
!= '01')</Expression>
        <Expression MESSAGE="Underwriting Class of Preferred Plus can be selected only with Table Rating of Standard
100.">(document.frmS3Segment.cmbSegmentUWClass.value != '03') || (document.frmS3Segment.cmbSegmentTableRating.value ==
'01')</Expression>
    </Expressions>
    <Validation>
        <Required>
            <Field>SegmentInitCovAmt</Field>
            <Field>SegmentTableRating</Field>
            <Field>SegmentUWClass</Field>
        </Required>
        <PolicyRoles>
            <!-- Owner, Insured, Primary Beneficiary, Registered Rep, Servicing Rep -->
            <Role>01</Role>
            <Role>37</Role>
            <Role>23</Role>
            <Role>82</Role>
            <Role>14</Role>
        </PolicyRoles>
    </Validation>
</Segment>

```

SegmentName Screen Image

Segment(s)

Issue Date	Type	Amount	Maturity Date	Status
------------	------	--------	---------------	--------

Coverage:

Segment Status
Issue Date

Termination Date
Maturity Date

Issue Age
Issue Face Amount

Insured Gender
Current Face Amount

Tobacco Use
Underwriting Class

Table Rating

Base Modal Premium
Base Annual Premium

Next Year Base Modal Prem
Next Year Base Ann Prem

Modal Policy Fee

XML Example

```

<InquiryScreen>
  <Input>
    <Fields>
      <Field>
        <Name>EffectiveDate</Name>
        <Display>Valuation Date</Display>
        <DataType>Date</DataType>
      </Field>
      <Field>
        <Name>PolicyNumber</Name>
        <Display>Polkicy Number</Display>
        <DataType>Text</DataType>
      </Field>
    </Fields>
  </Input>
  <Output>
    <Result DISPLAY="Policy Values">
      <Query TYPE="MATH" VALUATION="No">
        <MathVariables>
          </MathVariables>
        </Query>
        <Fields>
          <Field>
            <Display FORMAT="Date">PaidToDate</Display>
            <Name>PaidToDate</Name>
          </Field>
        </Fields>
      </Result>
    </Output>
  </InquiryScreen>

```

```

        </Output>
</InquiryScreen>
<InquiryScreen>
  <Input>
    <Fields>
      <Field>
        <Name>EffectiveDate</Name>
        <Display>Valuation Date</Display>
        <DataType>Date</DataType>
      </Field>
    </Fields>
  </Input>
  <Output>
    <Result DISPLAY="Paid To Date">
      <Table>
        <Results>
          <Query TYPE="SQL">SELECT .....</Query>
        </Results>
        <Column>
          <Display>Paid To Date</Display>
          <Name>PaidToDate</Name>
          <DataType>Date</DataType>
        </Column>
      </Table>
    </Result>
    <Result DISPLAY="Paid To Date Two">
      <Query TYPE="MATH" VALUATION="No">
        <MathVariables>
          </MathVariables>
        </Query>
        <Fields>
          <Field>
            <Display FORMAT="Date">Paid To Date Two</Display>
            <Name>PaidToDateTwo</Name>
          </Field>
        </Fields>
      </Result>
    </Output>
  </InquiryScreen>

```