September 24, 2004

Fast-Class File

Client Data System

Volume 44: 10 Year Term Renewals

One way of building a dynamic report that will find all ten-year term policies with a renewal date occurring in the next 60 days is to create a report using two filters: one that will find all ten-year term policies in your system based on plan name, and one dated filter that will find the ten-year anniversary of the policy dates of the ten-year term policies.

To build a filter that will search for all ten-year term policies in your system based on plan name –

- Select **View** in the main menu.
- Select Filters.
- Perform an open search to open the Filter Summary.
- In the Filter summary, click the Add button.
- In the Table Names window, select Policy.

Life	-
LTC	
Medical	
Medical Services	
Other Policy	
Pending Case Management Reports	
Phone	
Policy	
Policy Agent Relationship	
Policy Report	
Policy Transactions	_
Policy Warning	
Policy/Contact Relationship	
Portfolio Performance Calculations	-

Figure 1: The Table Names window (Policy table selected).

- In the Filter Criteria window, select the Plan Name column in the Column Name drop down.
- Use the **Value** drop down field to find the name of one of the ten-year term plans in your system.
- Select the Equal to operator in the Operation section.
- Click Add.

 Continue to use the Value drop down and Add button (with Operation set to Equal to) to add all ten-year term plans in your system to the Filter Criteria window.

🝸 Filter on Policy - Un	titled	×
Column Name	Value	Operation
Plan Name	- -	Equal
		C Not equal
==== Plan Name ==== = American Level 10		C Greater than
= LNL 10 Term	R	C Less than
Add	Mod Del	Cur.Record
Filters	Import	O AND O OR
ОК С	Cancel Run	Link Help

Figure 2: The Filter Criteria window (multiple Plan Names entered).

- When finished adding plan name criteria to the filter, click **OK**.
- Give the filter a name. Add a description if necessary.

To build a filter that will search for the renewal dates for ten-year policies occurring in the next sixty days –

- Select **View** in the main menu.
- Select Filters.
- Perform an open search to open the Filter Summary.
- In the **Filter** summary, click the **Add** button.
- In the Table Names window, select Policy.
- In the Filter Criteria window, select the Policy Dt column in the Column Name drop down.
- Click Add.
- In the **Date Filter Operation Selection** window, select the **Mixed Operations** option in the **Date/Day Operations** section.
- In the **Day Operations** section of the **Mixed Operations** window, enter **60** in the **Days** field and select the **Next Days** option.
- In the **Date Operations** section, select the **Offset in Past Relative to Today** option.
- In the **Offset** section, enter 00 in the **Month** field, 00 in the **Day** field, and 0010 in the **Year** field.

	Help			
Days 60 • Next Days	This option is used to filter all events occurring within the specified number of Days in the future, with regard to the current year. Example: To use the Next Days option in a filter that will find all policies expiring (reaching their Paid To date) in the next 30 days, select Next Days, enter 30 in the Days field and then all of the CK			
C Previous Days				
Offset in Past Relative to Today				
Offset in Future Relative to Today	CIICK UN.			
Diffset				
Month 00 Day	00 Year 0010			

Figure 3: The Mixed Operations window (criteria added).

The offset will look ten years in the past to find all policy dates occurring exactly ten years ago from the current day. The Day operator will then look forward 60 days from that date to find all policy dates occurring in that range – 60 days from 10 years ago today. This filter will effectively find all policies with a ten-year anniversary of the policy date in the next 60 days.

- Click **OK** in the **Mixed Operations** window.
- Click **OK** in the **Filter Criteria** window and give the filter a name.

To create a dynamic report that will find all ten-year term policies expiring in the next 60 days -

- Select **Reports** in the main menu.
- Select Dynamic Reports.
- Perform an open search to open the **Reports** summary.
- Click the **Add** button.
- Select the **Policy** table in the **Select Primary Table** window.
- Select columns for display in the report in the **Report Column Definition** window.
- Click Next.
- Use the **Filter** drop down fields in the **Selection Criteria** window to add the filter that will find all ten-year term policies and the filter to find all policies with a ten year anniversary of the policy date in the next 60 days.



• Select the And operator to the right of the first selected filter

Selection Criteria Filter
10YR TRM PLCY 💌 💽 AND 💭 OR
10YR RENEWAL 💌 💿 🙀 D 🔿 OR
CAND COR
C AND C OR

Figure 4: The Report Selection Criteria window (multiple filter operator selected).

When a filter is selected in a **Filter** drop down, the filter operators become active. The filter operators refer to the next filter added (if applicable). Selecting the **And** operator will ensure that report results include records that meet criteria for the filter with the operator <u>and</u> the following filter. Selecting the **Or** operator will ensure that report results include records that meet the criteria of the filter with operator <u>or</u> the criteria of the following filter.

- Click Next.
- Apply settings as needed in the Select Output Type and Spreadsheet Output Settings windows.
- Give the report a name in the **Report Package Description** window.
- Click Finish.
- The new report will be automatically highlighted in the **Report** summary screen.
- With the report highlighted, click the **Run** button.

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	Policy Type	Contact Name	Policy#	Policy Dt	Plan Name	Plan Type	Benefit	Ann.	Status	
	Life	Christiansen, Carolina	NL3900530	10/17/1994	LNL 10 Term	"erm	1,000,000	1,450.00	Inforce	
	Life	Dawson, Carol	5830111	10/19/1994	American Level 10	erm	100,000	150.00	Inforce	
	Life	Ackerman, Joseph	334865112	10/27/1994	LNL 10 Term	erm	1,000,000	1,450.00	Inforce	
	Life	Chung, Harold	6699778	11/01/1994 😽	LNL 10 Term	erm	15,000	503.40	Inforce	
	Life	Ackerman, Kathleen	AM17864	11/07/1994	American Level 10	erm	25,000	600.00	All Forms In	

Figure 5: Policies meeting filter criteria of dynamic report – all ten-year term policies with a renewal date in the next 60 days.