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.
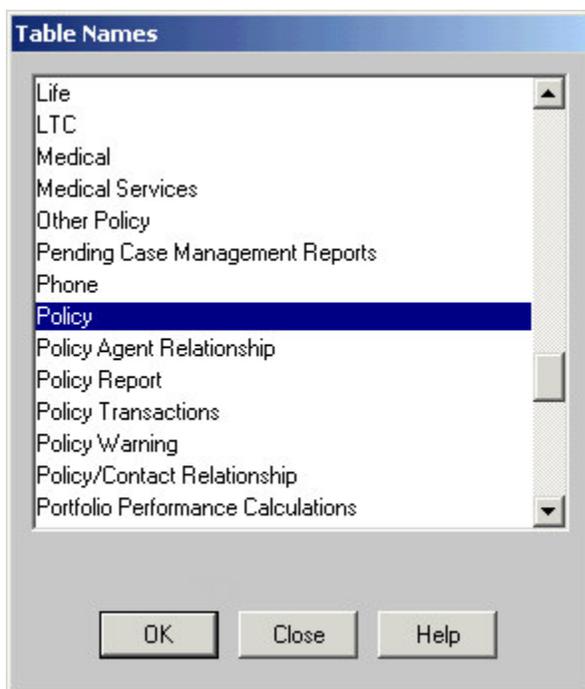- In the **Table Names** window, select **Policy**.

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.
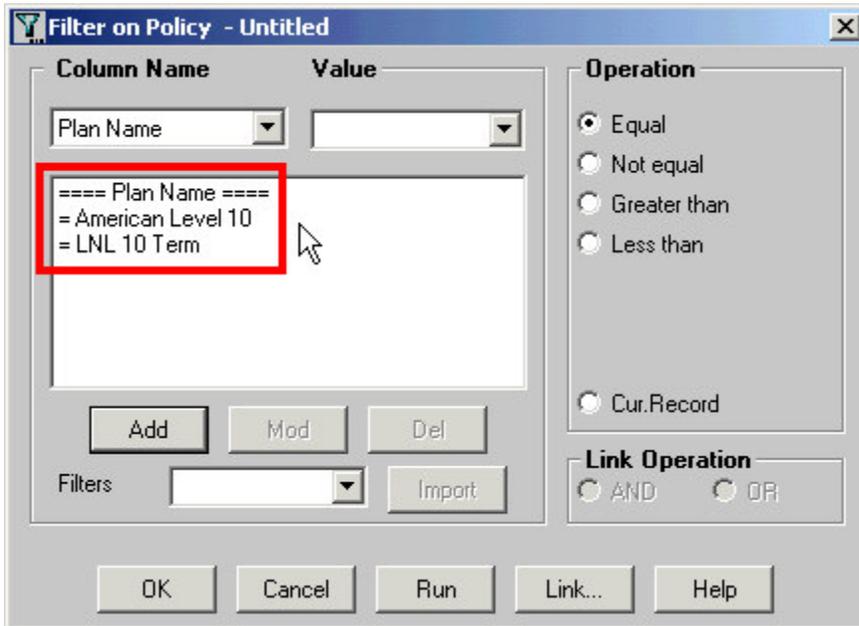

Figure 2: The Filter Criteria window (multiple Plan Names entered).

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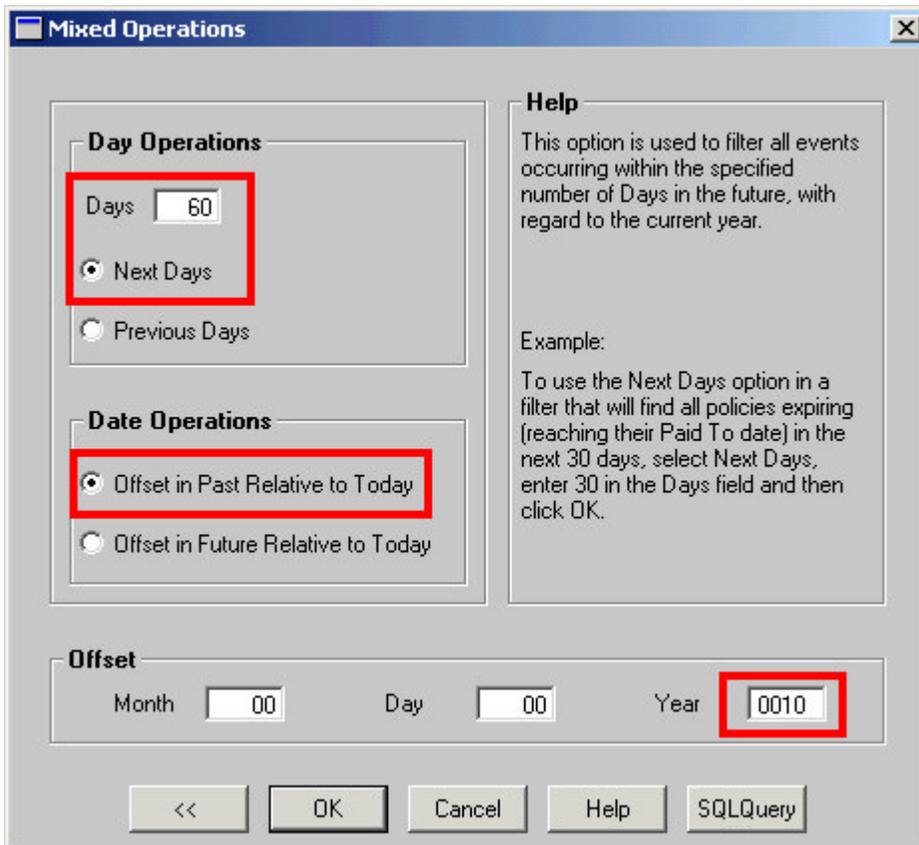
Figure 3: The Mixed Operations window (criteria added).

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.

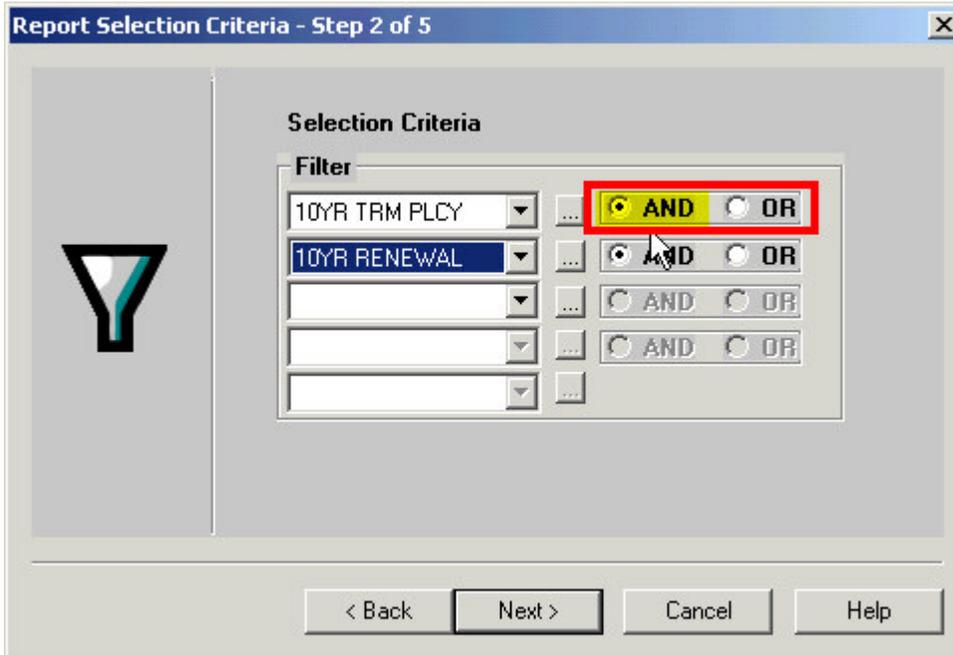- Select the **And** operator to the right of the first selected filter

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.

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