



## **ALL ABOUT TRIGGERS Q & A**

**Presenter: Sarah Sheppard**

**Date: July 2021**

### Question #1:

- In the past, with the G9 partners, we discussed that the termination type 'Transferred' was more neutral and should be used instead of 'Business Decision' for things such as 'created in error' or 'selected incorrect package.' This is because 'Business Decision' makes it seem more serious.

### Answer:

- Based on current user trends, we see 'Business Decision' selected frequently in a scenario where a contract was created in error or duplicate. The user denying or terminating the contract has the option to include a comment with details on the exact reason. The most recent system enhancements included options to delete a maintenance or requirement package within a contract container. In a future system release, the functionality to delete a full contract package within a contract container. This should eliminate many of the denied or terminated contracts under the 'Business Decision' status because of an error once implemented.

### Question #2:

- For Compliance/Sponsorship Answer Modified – If you set this up does it only create a trigger if the Advisor changes the answer or does it create a trigger anytime the question is 'answered'?

### Answer:

- For this trigger, a task is only generated if an existing Sponsorship or Compliance question is modified. It will not generate a task for questions answered. For example, you create a trigger for question #24 - *Have you ever been under any legal order to make monetary payments to another person or business entity, including spousal support? If 'yes', provide details.* The original response to this question was 'no' but the Advisor logs in and changes it to 'yes,' provides the mandatory additional information. A task would be generated, so you know exactly where to review in the Profile Snapshot (Advisor Screening Questionnaire).

### Question #3:

- It was my understanding that Equifax only updates APEXA when scores cross a threshold. Each threshold is 25 points. In your presentation, you said 1 point. Is that only if it moves to another range?

**Answer:**

- That is correct. Each credit score range is approx. 25 points. APEXA is notified when a credit score moves from one range to another – even if that change is only by 1 point. This chart highlights the exact credit score ranges:

Range code	Range	Range code	Range
A	< 452	J	652 – 676
B	452 – 476	K	677 – 701
C	477 – 501	L	702 – 726
D	502 – 526	M	727 – 751
E	527 – 551	N	752 – 776
F	552 – 576	O	777 – 801
G	577 – 601	P	802 – 826
H	602 – 626	Q	827 – 851
I	627 – 651	R	> 851