

# Life & Annuity General Messages

## 510 FormInstance Maintenance

### Function

- Provides functionality to add, update, delete, and purge documents using the FormInstance Object.
- **Purging** a document means that the document is completely removed (i.e., destroyed). The only evidence of its existence would be an audit trail that will provide a reason for the document having been purged.
- **Deleting** a document involves making a document unavailable to users but the object still remains in the data store.
- **Update** will allow any FormInstance object to be updated using the Standard DataRep values:
  - "Full" to request an insertion of new data
  - "Full" or "Partial" to request an update of existing data.
  - "Removed" to request a deletion of old data.
- **51000 FormInstance Maintenance** is used as the default transaction for general updates to a FormInstance.
- **51001 Signature Request** is used to request that a signature be applied to a FormInstance and is primarily used when modeling allowed transactions for products.

### Benefits

- Standard Data Exchange
- Agreement on Common Structures:
  - Vocabulary (Life Data Dictionary)
  - Structure (Life Object Model)
  - Support Unique Requirements in Standard Way
  - Eliminate Custom Data Feeds
- Model Driven Architecture
  - Provides Common Architecture to All Messages
  - Encourages Reusable Components
  - Results in Reusable Code and Development

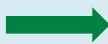
### Related Messages

- **229 FormInstance Inquiry:** used for those situations where the calling application has limited information on the object and is looking to retrieve the detailed data of the FormInstance object.
- **500 FormInstanceRequest Submission:** used to request copies of a physical document (not just the FormInstance information).

### Additional Information

- DTCC uses the 510 for their Attachment Process.
- IRI uses the 510 for eSignatures.

### EDI to XML Mappings

DTCC File	ACORD TransType
App/SUB (Applications)	103 – New Business Submission
App/SUB (Sub Payments)	508 – Payment Submission
<b>Attachments</b> 	<b>510 – FormInstance Maintenance</b>
COM (Commissions)	1206 – Commission Statement
FAR (Financial Activity Reporting)	1213 – Financial Activity Transmittal
L&A (Licensing & Appointments)	410 – Appointment Submission 413 – Appointment Termination 1228 – Producer Transmittal 228 – Producer Inquiry 129 – License Submission
POV (Positions & Valuation)	1212 – Values Transmittal or 1203 – Holding Transmittal
IFT (Inforce Transactions)	102 – Fund Transfer Admin 105 – Withdrawal Submission 107 – Arrangement Admin 113 – Policy Admin 115 – Policy Admin Inquiry 212 – Values Inquiry 810 – First Notice of Loss