

Quick Search

Introduction:

This tech corner article provides you with an overview to using the Quick Search function within the TAI System, for querying and extracting data from the TAI database.

Quick Search

Step 1: Use this screen to search for policies or reinsurance that meets specific search criteria. To access this screen, click **Reinsurance > Quick Search**.



The screenshot shows the TAI Quick Search interface. At the top, there are navigation tabs: Admin, Reinsurance, History, Reports, Tables, Utilities, Claims, Help. The main header includes the TAI logo and 'TAI Base TAI'. Below this, there are input fields for 'Company', 'Policy', and 'Coverage'. The 'Reinsurance Criteria' section contains several dropdown menus: Status, Class, Issue Ages, Mort. Rating (%), Treaty Type, Cedat Amount, Reinsured Only, Reinsurer, Gender, Temp Flat Extra, and Reins. Issue Type. The 'Policy Criteria' section contains: Status, Single/Joint, Issue Date, Face Amount, Death Benefit Opt., Admin Rats. Sec., ADE, Product Type, Has a claim, Admin Code, Waiver, Plan Code(s), and Pol Issue Type. A 'Max. Matching' field is set to 25. At the bottom right, there are links for 'Create Audit CSV' and 'Export to Excel'.

Step 2: Enter the appropriate search criteria and click **Search**. The system returns a list of policies that match the search criteria. To export the results to Excel, click **Export to Excel**.



The screenshot shows the TAI Quick Search interface with search criteria entered and results displayed. The 'Company' field is set to 'IA'. The 'Reinsurance Criteria' section has 'Status' set to 'Inforce', 'Reinsurer' set to 'AA', and 'Reinsured Only' set to 'all policies'. The 'Policy Criteria' section has 'Status' set to 'Inforce'. The 'Max. Matching' field is set to 25. The 'Matching Policies (17)' section shows a table of results.

Co / Plan / Cov	Plan	Pol Status	Rein Status	Face Amount	Cedat Amount	Issue Date
TAI L7220227.01	L74624	Premium Paying	Inforce	\$20000.00	\$20000.00	20-Jun-2015
TAI LUL1301061.01	TE917	Premium Paying	Inforce	\$20000.00	\$20000.00	13-Jan-2002
TAI DR10282.01	TE849	Premium Paying	Inforce	\$20000.00	\$20000.00	03-Jan-2000
TAI DR10282.01	TE849	Premium Paying	Inforce	\$20000.00	\$20000.00	03-Jan-2000