

Replacing Agent Inbox and Signing process (stop using DocuSign interface)

Main UI changes:

1. Remove agent inbox, replace with a table listing enrollments showing “pending” (one tab) and “completed” other tab.
2. Modify Census table to show Pending status w/button & including enrolling agent(s), and modify Edit Census record to show link to PDFs for completed enrollments
3. Remove “docusign” integrations for agent records

Replace Agent inbox:

New page for <https://5starenroll.com/inbox> to list any *agent*-pending enrollments – i.e., those who have been signed by the EE and need to be signed by the Agent.

List a table using same widget as for the Census table. Want 2 tabs: Pending, Completed.

The Pending tab should include the following columns:

Action (no header, just column)
Datestamp (of EE signature, default sort in ascending order)
Group
First
Last
Product(s)
Coverage

When listing coverage, let's use a syntax of EE/SP/CH, so examples of table values would be:

- 10,000 / - / - (i.e., 10K EE only)
- 50,000 / 20,000 / - (i.e., 50K EE, 20K sp)
- - / - / 10,000 (i.e., 10K children only)
- 34,561 / 10,000 / 20,000 (i.e., coverage for everyone)

The “Action” column is merely a column for a button. Every button in this column should just say “Sign”, using the same gold color as the “Access agent signing inbox” on home page / “Email enrollment” button on census.

Here's a quick hack on the screen (ignore colors, just using red to draw attention to text changes):

Home > Enrollment Cases > Test Group 123

Agent Inbox

Test Group 123

Pending Completed

Enrollment Import Enrollments

Case Census Email Enroll + New Enrollment

Enrollment City: Chicago Enrollment State: IL

Display 10 records Search:

Show Enrolled

Last Name: Reset A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

	Status	First	Last	DOB	Email
+ Add Coverage	✓ Enrolled	John	Doe	02/02/1980	no@thanks.com
+ Add Coverage	✓ Enrolled	Jack	Doe	02/02/1982	
+ Add Coverage	✓ Enrolled	Edward	Griffin	11/05/1972	egriffin1f@ft.com
+ Add Coverage	✓ Enrolled	Denise	Harrison	05/01/1990	hharrison49@sun.com

The Sign button action should initiate an embedded signing session in DS, just as when done for the EE. *Zach: We need to have a unique id when presenting that agent as a signer on the app. I'll call this the "agent signing ID" and I believe it's what we want to use in the DocuSign `clientId` value. As long as we use this same ID when embedded signing for the agent, DS will "remember" their signature and not require it on subsequent signs. We won't need/want it displayed in the UI, although I suppose we could simply store it along with the other data in the Stormpath record. Fine just to generate it the first time you need one and don't have it. This will result in every agent having to re-assert their signature the first time they use this new inbox, but that's OK.*

The Completed tab should have the same columns, but instead of a "Sign" button, we want to use a small PDF icon whose action opens a new tab/window displaying the completed PDF.

Modify Census table

Add a new "Interrupted" status in the table (perhaps use a small gold "clock" icon for continuity) for those with an envelope but no EE signature on it, and a "yellow" button that says "Continue" as the action button:

Show Enrolled

Last Name: Reset A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

	Status	First	Last	DOB	Email
Continue	Interrupted	Shirley	Brown	09/06/1947	
+ Add Coverage	Enrolled	Philip	Carpenter	03/13/1992	
+ Add Coverage	Enrolled	John	Doe	02/02/1980	email@any.com
+ Add Coverage	Declined	Gerald	Hamilton	01/06/1957	
+ Add Coverage	Enrolled	Denise	Harrison	05/01/1990	
Enroll	Not Enrolled	Craig	Howell	06/12/1976	bdavis@5starlifeinsurance.com
Enroll	Not Enrolled	Carolyn	Hunter	06/24/1972	
Enroll	Not Enrolled	Scott	Peters	12/08/1958	

Sort the entries so that “Interrupted” entries are always listed at the top.
modify Edit Census record

add a new first columns to the enrollment record at top of the edit census record page, header “View” and values

- “pending agent” if agent not yet signed
- same PDF icon link as on “Complete” tab of agent inbox, to open/view PDF in separate tab/window

Edit Census Record

Enrollment history for Chris Ballew

Timestamp	Product	Status	Coverage For	Face Amount	Annual Premium
12/29/2015 1:20pm	Family Protection Plan - Terminal illness	Enrolled			312.72
Employee					25K
Spouse					No Coverage
Child					No Coverage

Remove “docusign” integrations for agent records

Just remove the Docusign key from being displayed on the agent

Once we’ve lived with all this for a couple weeks in production, let’s then delete that data from the agent user record altogether.

Update an Account

First Name

Last Name

Email

Agency

5Star Agent Code

Signing Name

Alfred

Sstaragent@humbprintcpm.com

AA Benefits, Inc.

26PQD

Alfred Agent

25040570 6048 2042 0725 544531043

Activated

☐ Send activation email

API Token