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 <a href="https://5starenroll.com/inbox">https://5starenroll.com/inbox</a> 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

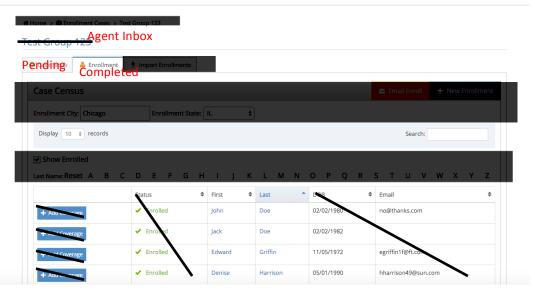
When listing coverage, let's us a syntax of EE/SP/CH, so examples of table values would be:

```
    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):





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 clientUserId 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**

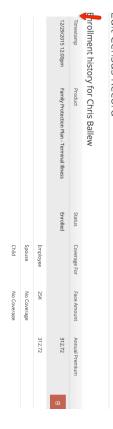
Add a new "Interrupted" status in the table (perhaps use a small gold "clock" icon for continuity) for those with an envelope but no EE signature on it, and a "yellow" button that says "Continue" as the action button:



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

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

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



## Remove "docusign" integrations for agent records

data from the agent user record altogether. Once we've lived with all this for a couple weeks in production, let's then delete that Just remove the Docusign key from being displayed on the agent

