INSURANCE TECHNOLOGIES

Need signature type added to custom report

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iConnect 240507 Design Approach - Need signature type added to custom report

Project Overview

Description:

For the Application Status Report generated daily, a new field will be added to the report that tells whether the application used e-signature or not.

Impacts: Application Status Report - New 'Signature' field is added.

1   Report - Add Signature field to Application Status Report

Add a new field in Application Status Report for E-Sign as 'Signature'.

Mockup:

As per below mockup for Application Status Report, add new column between 'Displays Status' and 'Date Entered Review Queue' to show E-Signature value.

Application Status Report - Charles Schwab														
Report Date :	01-Feb-21													
Policy Number	Application	Carrier	Product	Last Update Date	Current Status	Displays Status	Signature	Date Entered Review Queue	Review Queue	Reviewer	Agent	Client Name	CustomerID	Total Amount	Source of Funds
8500811698	mask	Sammons Financial Group	LiveWell Guarantee Annuity	02-01-2021 23:36	In Review	ReviewQueueApproved	E-sign	1/27/2021 0:50	3. Suitability	N/A	Jon Englert	mask	665413656	$$200,000	Wire,
0164CSC21012001450	mask	New York Life	Secure Term Choice Fixed Ann	02-01-2021 23:25	In Review	ReviewQueueApproved		1/20/2021 16:23	3. Suitability	N/A	Ron Heywood	mask	807987319	$$250,000	Check,
0164CSC21012901617	mask	Protective Life	Schwab Genesis VA	02-01-2021 23:21	In Review	ReviewQueueApproved		1/29/2021 15:47	3. Suitability	N/A	Robert Baker	mask	188454396	$$4,008,957	1035 Exchange(1),
0164CSC21012101477	mask	New York Life	Guaranteed Lifetime Income A	02-01-2021 23:14	Complete	Complete	E-sign	1/21/2021 22:36	3. Suitability	Lisa Crawford	Jeff Kronschnabl	mask	545781045	$$100,000	Check,
0164CSC21010501237	mask	Protective Life	Schwab Genesis Advisory VA	02-01-2021 22:59	In Review	ReviewQueueInProgress		1/28/2021 23:54	3. Suitability	John Green	Tracy Antony	mask	983387647	$$129,211	1035 Exchange(1),
8500811109	mask	Sammons Financial Group	LiveWell Guarantee Annuity	02-01-2021 22:55	Complete	Complete	E-sign	1/21/2021 21:06	3. Suitability	Lisa Crawford	Faye Jordan	mask	920003111	$$100,000	Wire,
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ApplicationStatusReport														

Condition:

If there is no E-Sign value, cell will be left blank.

Acceptance Criteria

- One new column should be added to report 'Application Status Report' as 'Signature' between columns 'Displays Status' and 'Date Entered Review Queue'.
- When no signature value is there for a record in report, the column should still be there with blank cell.