INSURANCE TECHNOLOGIES

Create Reporting

FIRELIGHT BASE

FireLight®

Platform

CREATE REPORTING

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iConnect Design Approach - Create Reporting

Project Overview

We need to finish the reporting for services completed within the 2.15 release. Please create the following reports that will be used for new functionality created in the 2.15 release. These will include stories on GIACT, Configurable Pre-sale, and the Expiration Deadline Date.

Release Documentation on Reporting Impacts:

-Reports

-Third Party Services

-Billing information

-Review Queue

1 Add detailed activity report on volume of transactions of GIACT web service(s) executed

Implement a detailed activity report that can be sent daily, weekly, or monthly that lists all transactions that have an account response code (and customer response code if applicable) which will provide the volume of transactions utilizing the GIACT web services. This report will be called "GIACT Web Service Detailed Report"

FireLight will report for each individual GIACT call out, even if there are multiple call outs in one transaction. There could be multiple records for the same transaction ID. Mockup is attached.

Fields in Report:

- ACORD Type (eApp, eDelivery, etc.)

- Agent ID

- Distributor Transaction ID (AppID)
- Call Date

- Initiating Organization
- Account Response Code (gVerify)
- Customer Response Code (gAuthenticate)

Acceptance Criteria

- GIACT Web Service detailed activity report is available and contains the following columns:
- - ACORD Type (eApp, eDelivery, etc.)
- - Agent ID
- - Distributor Transaction ID (AppID)
  - Call Date
- -Initiating Organization
  - Account Response Code (gVerify)
  - Customer Response Code (gAuthenticate)
- Reports all cases that have an account response code (have utilized the gVerify web service)
- Send a sample to PO for Review

2 Add billing code to Admin and Activity Reports

Clients need to be able to run reports for the activities they created and billing needs to be able to associate it with a billing code. This will be added along with the Activity and ACORD Type to the reports. Please see story 2132 for further reference.

Billing code will be added alongside the Activity type and ACORD type within the reports. Activity Type - ACORD Type - Billing Code, Example: Pre-Sale - Needs Determination - BC1234

Acceptance Criteria

- All reports containing Transaction information that would include the Activity Billing code will be available and visible to show Billing code listed after the Activity and activity type
- Not all Activity and Activity types will include a billing code, as this field is optional for Carriers/Distributors to use
- Billing code is a unique ID that is alpha-numeric and is entered by IT on behalf of the Distributor/Carrier

3 Reporting for Configurable Activity

Transaction specific reports need to reference Activity Type, ACORD Type (show the name, and Billing Code. This would include the following reports:

Carrier Transactions by Distributor by Product Name

Distributor Transactions by Carrier by Product Name

FireLight Carrier Transactions by Product Type

FireLight Distributor Transactions by Product Type

FireLight Distributor Transactions by Carrier

FireLight Carrier Transactions by Distributor

The reports will contain the following rows: (Example attached)

Organization

Activity Type - ACORD Type - Billing Code (if applicable)

Product Name

Acceptance Criteria

- Transaction reports will be available and visible with the following rows:
- Distributor/Carrier Organization (ex. FL Distributor)
- Activity Type - ACORD Type - Billing Code (If applicable)
- Distributor/Carrier Organization (ex. Allianz)
- Product Type/Name
- Transaction Type will be listed as Activity Type

4 Create Reporting for Expiration Deadline Date

We will need to be able to create 2 new reports for the Expiration Deadline date what would be titled "FireLight Expiration Deadline Date Detailed Report" and "FireLight Pending Expiration Deadline Date Detailed Report". These reports will be similar to the purge policy and pending purge policy reports that will display the cases that have been impacted by the expiration deadline date. The Expiration Deadline Detailed Report will list activities that have been expired per the deadline date, from the review queue, and the Pending Expiration Deadline Date Detailed report will list activities that will be expiring from the review queue shortly.

An input date parameter is not needed for the Pending Expiration Deadline Date Report. This will include all transactions that are about to expire.

These will both be activity reports that will be sent via email, and can be generated daily, weekly, or monthly, depending on the client's choice.

The Expiration Deadline Date Detailed Report will display the following columns:

-Activity Type (Pre-sale, Application, etc.)

-Case Name

-Create Date

-Last Activity

-Days Elapsed

-Expired Date (Date that the case was set to expire)

-Status (Pending review, Complete, etc)

-Agent Name

-Agent ID

The Pending Expiration Deadline Date Detailed Report will display the following columns:

-Activity Type

-Case Name

-Create Date

-Last Activity

-Days Elapsed

-Pending Expired Date

-Status

-Agent Name

-Agent ID

Expired Date and Pending Expired Date and Days Elapsed will be listed and stored within the database through the Review Queue.

Acceptance Criteria

- Expiration Report will be available and display case name, create date, last activity, days elapsed, expired date, status, Agent Name, Agent ID, and Activity Type.
- Pending Expiration Report will be available and display case name, create date, last activity, days elapsed, pending expired date, status, agent name, agent ID, and activity type.
- Send a sample to PO for Review

5 FireLight Illustration: List of Unique Users

With the use of FireLight Illustration (ACORD Type 111), we will need to capture the Active users accessing this activity for a rolling 90 day timeframe. For Example, if a user were to log in one time today, and used FL Illustrations, and I ran the report tomorrow, that user would show as currently active. If I ran the report 5 months from now, and the user had only logged in the one time, then they would not display on the report, as it has exceeded the 3 month span that was requested.

This will need to be reflected in 2 separate reports: one will be in a format for Invoicing, and the other would be for the Clients to review.

A Mock-up is attached of both reports. . The summary report is showing who has accessed FL illustrations from an invoicing perspective, and we will want the detailed report to show how many illustrations that particular user ran for metric purposes.

The client detailed report will be named "FireLight Illustration User Detailed Report". This report will be a detailed report that can be emailed to the organization daily, weekly, or monthly

The Report can be ran for a single organization, or all organizations.
Start date depends on frequency. Daily report would list for a single day, weekly for the last 7 days, monthly for the entire month.

Fields on the report:

Agent ID (User ID)

Carrier

Seller Name

Create Date

CUSIP

Request Type

Transaction ID

Request ID

The Invoicing Summary report will be named "FireLight Illustration User Summary Report. This report will be a summary report and will be available monthly

Report can be ran for a single organization, or all organizations.

Start date should be driven from a parameter within the config, defaulting to -90 days from the ending date.

Fields on the report:

Organization ID

Organization Name

Agent ID (User ID)

Active (Show the number of FL Illustration transactions if applicable)

Acceptance Criteria

- The invoicing Summary report will be visible and display Organization ID, Organization Name, Agent ID, and if the user is Active
- The Invoicing Summary report will only be available on a monthly basis
- The Invoicing Summary report will show active users for 90 days at a time
- The Client Detailed Report will be visible and display Agent ID, Carrier, Seller Name, Create Date, CUSIP, Request Type, Transaction ID, and Request ID
- The Detailed Report will be available for daily, weekly, or monthly transmission
- The Detailed report will show active users for 90 days at a time

- Both reports are valid for Firelight Illustration
- Send a sample to PO for Review

6 Configurable activity: Add Activity Type Dropdown to filter reports on Activity Name

For this enhancement, the admin reports will be changed to reflect Activity Type and not specifically application. We will need to add a dropdown that will reflect the Activity Type but will be filtering based on ACORD Type behind the scenes.

Along with the Activity Type, this dropdown will also need to contain an "ALL" to see all activity names (and all ACORD Types).

The following reports will need this dropdown applied, and the mockup of default activities is attached:

Agent Report

Agent Activity

Application Audit

Agent Activity Firm Report

Agent Firm Report

Client Signed Report

Abandoned Activity Report

Acceptance Criteria

- When in Admin reports, for the list provided, an Activity dropdown will be listed reflecting all of the activities listed for selected organization. These can include:
- Account Opening
- Application
- E-Delivery
- Fee Inquiry
- Guided Illustration
- Illustration

- Needs Determination
- Post Issue
- Print Forms
- Quote
- SubPay
- The following reports have the activity dropdown displayed:
- Agent Report
- Agent Activity
- Application Audit
- Agent Activity Firm Report
- Agent Firm Report
- Client Signed Report
- Abandoned Activity Report

