
Add TTEE Designation for Trustee Signature

FIRELIGHT BASE



Platform

ADD TTEE DESIGNATION FOR TRUSTEE SIGNATURE

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Insurance Technologies, LLC

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Insurance Technologies, LLC

Two South Cascade Avenue
Colorado Springs, CO 80903
USA

Phone: 719.442.6400

FAX: 719.442.0600

Internet E-Mail: info@insurancetechnologies.com

Website: <http://www.insurancetechnologies.com>

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iConnect 258853 Design Approach – Add TTEE

Designation on Trustee Signature

Project Overview

This enhancement will display designation text "TTEE" as a suffix on the signature line in case a trustee is signing the application. This text will appear on the signature control only for the signer type "Trustee". This is a suitability requirement and to implement it currently the agent advice clients to add TTEE on their signature when sending an email request. If the user fails to suffix their signatures with the text "TTEE", the application goes into NIGO. This enhancement will fulfill the suitability requirement and eliminate one reason of NIGO applications.

Impact:

1. Applications containing forms that require to be signed by a Trustee. Text "TTEE" will be placed as a suffix on the trustee signature field at below places:
 - Form/application
 - Addendum document
 - Application PDF
 - Application Audit Report
2. Applications created via Embedded APIs/IXN.

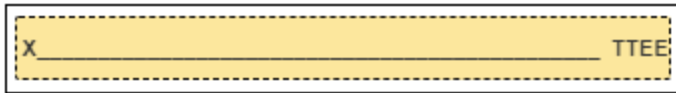
1 Suffix TTEE to a trustee signature

When a trustee will be signing the application, FireLight will pre-populate text "TTEE" as a suffix on the signature line of the Trustee signature field. This text will be applied on the signature field for only Trustee Signer type. The enhancement will be applicable on all the instances where signatures are captured from a Trustee:

1. Client E-Sign Now
2. Client E-Sign Later
3. Request Client to Fill & Sign App
4. Embedded APIs/IXN

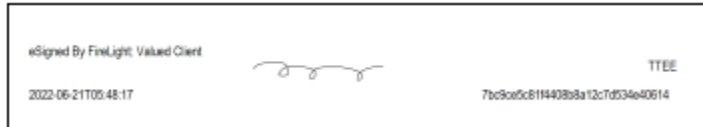
Text "TTEE" will appear as a suffix on the signature field for Trustee signer at following instances:

1. When signature field appears while data entry:

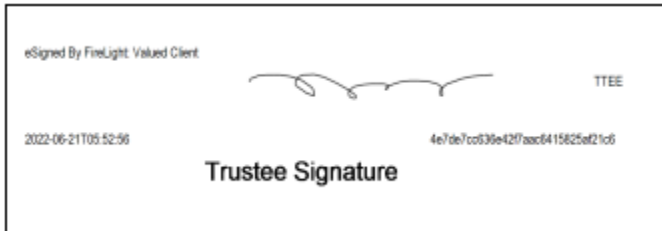


2. After Trustee signatures are captured:

a. on the application:




b. on the addendum:



3. On the application PDF where Trustee signatures are stamped:



4. On the application Audit report where Trustee signatures are stamped:

Signature Summary		
Participant Identifier	8477bd64-68ff-4d09-8bae-6133cc49c569	
Signature Identifier	4e7de7cc-636e-42f7-aac6-415825af21c6	Timeline
Signing as	Trustee	6/21/2022 5:52:56
Captured Name	Valued Client	
Captured State	Arizona	
Captured City Name	Arizona	
Captured Signature	 TTEE	
Identity Check Type	Agent Verification	
	Identification Type:	DriversLicense
	Identification Number:	12345
	Identification State:	Colorado

Text "TTEE" will not appear on the signature field while a trustee is reviewing documents at the time of signing ceremony.



Text "TTEE" will show suffixed on trustee signature field on the Application, Application PDF and Application Audit for below cases:

1. For all the trustee signers such as - Trustee, Trustee 2, Trustee 3, Trustee 4
2. When multi-selection is done at the time of signing for "Trustee" signer along with "Owner" signer type.

Conditions:

1. Size of the signature control should be higher than size 160x30, so that TTEE is not overlapped with the signature on it.
2. No other signer types referencing owner will show TTEE on the signatures only. It will only show for signers "Trustee" and "Owner".
3. "Owner" signature field will show TTEE on the application and application PDF. In the audit report TTEE will show on "Trustee" and "Trustee, Owner" cases.

Case (1): When Owner and Trustee are multi-selected for signing, TTEE will show on Owner and Trustee signature fields on the application and application PDF. On the Audit Report, TTEE will show for Owner and Trustee signature section.

Case (2): When Owner, Insured and Trustee are multi-selected for signing, TTEE will show on Owner and Trustee signature fields on the application and application PDF. On the Audit Report, TTEE will not show for Owner, Insured and Trustee signature section.

Case (3): When Joint Owner (or other signers with reference to Owner) and Trustee are multi-selected for signing, TTEE will show on the Trustee signature field but not on Joint Owner signature field on the application and application PDF. On the Audit Report, TTEE will not show for Joint Owner (or other signers with reference to Owner) and Trustee.

Acceptance Criteria

- Designation "TTEE" shows on the signature line only for a Trustee signer.
- When signing as Trustee the designation for "TTEE" is on the signature line for all documents where Trustee need to sign.
- Text "TTEE" appears as a suffix on the form and addendum documents after Trustee signatures are captured.
- Text "TTEE" appears as a suffix on the trustee signature field on the application audit report.
- Text "TTEE" appears as a suffix on Owner and Trustee signature fields in case user multi-selected Owner and Trustee signer roles for signing.
- Text "TTEE" for Trustee signer is also applied for applications created via embedded APIs/IXN.