

# iConnect 127011 Design Approach

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Provide a carrier controlled message that a form has been updated - both before and after lock down.

## Workflow Changes

There is no changes to the normal workflow of the system. We just need to show a message to user if there is any changes made in forms of the application.

## Features/Requirements

Currently, if there are any changes (added/removed) made in forms in package, there is no system that can notify the end user about it. The end user in FireLight application is not aware that changes actually happened. The application may be in LOCKED state and in this case user must need to unlock application to get latest changes.

For above requirement, we need to notify user regarding changes in form list at FORM ENTRY or LOCKED state. If user's application is in LOCKED state, he can unlock application to get latest changes.

## Admin Changes

No Changes.

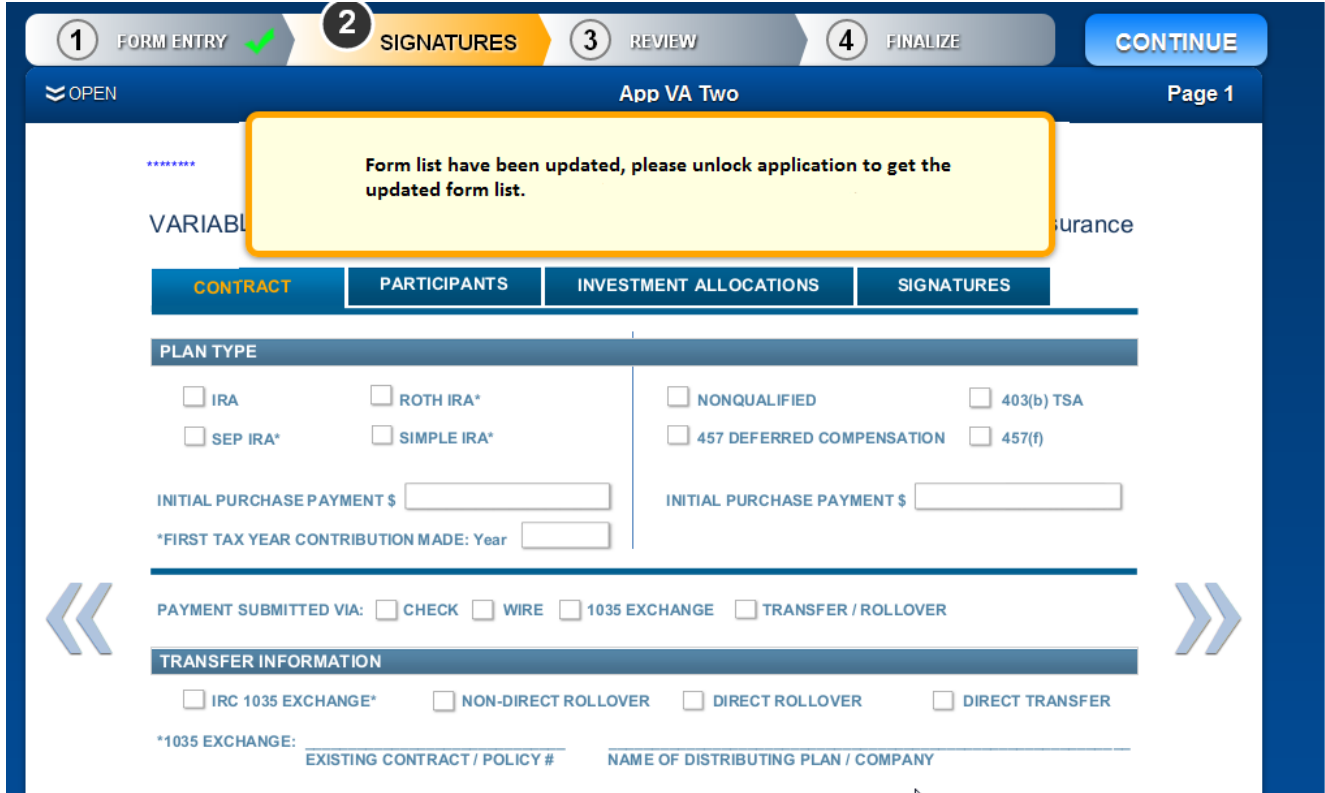
## App Changes

To implement this functionality

1. When user open application, we need to check for any changes made in package.
2. If there are changes, we will show a message to user according to state of application.
3. If application is in FORM ENTRY state, we can show simple message regarding the changes as changes are already there.
4. If application is in LOCKED state, we will show message regarding changes and necessity to unlock application to get latest changes.
5. We will use css file so we can show carrier controlled message.



When application is locked state, we can show following message -



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Form list have been updated, please unlock application to get the updated form list.

VARIABLE

App VA Two Page 1

**CONTRACT** PARTICIPANTS INVESTMENT ALLOCATIONS SIGNATURES

**PLAN TYPE**

☐ IRA ☐ ROTH IRA\* ☐ NONQUALIFIED ☐ 403(b) TSA

☐ SEP IRA\* ☐ SIMPLE IRA\* ☐ 457 DEFERRED COMPENSATION ☐ 457(f)

INITIAL PURCHASE PAYMENT \$

INITIAL PURCHASE PAYMENT \$

\*FIRST TAX YEAR CONTRIBUTION MADE: Year

PAYMENT SUBMITTED VIA: ☐ CHECK ☐ WIRE ☐ 1035 EXCHANGE ☐ TRANSFER / ROLLOVER

**TRANSFER INFORMATION**

☐ IRC 1035 EXCHANGE\* ☐ NON-DIRECT ROLLOVER ☐ DIRECT ROLLOVER ☐ DIRECT TRANSFER

\*1035 EXCHANGE: EXISTING CONTRACT / POLICY # NAME OF DISTRIBUTING PLAN / COMPANY

## Areas Impacted

| System Area             | Yes | Comment  |
|-------------------------|-----|--|
| <b>FireLight App</b>    |     |  |
| - Edit Application      |     |  |
| - Form Entry            | Yes | Show message to user if any form updated/deleted in package and update application with new forms. |
| - Post Lock Application | yes | Show message to user to unlock his application when any changes founds in form list.               |
| -                       |     |  |
| -                       |     |  |

|                             |  |  |
|-----------------------------|--|--|
| <b>FireLight Console</b>    |  |  |
| - <b>Windows O/S</b>        |  |  |
| - <b>iOS</b>                |  |  |
| - <b>Android</b>            |  |  |
| -                           |  |  |
| <b>Other Systems</b>        |  |  |
| - <b>DTCC Integration</b>   |  |  |
| - <b>Commission netting</b> |  |  |
| - <b>Activity Reporting</b> |  |  |