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Disable Signing Ceremony after PreSignature Review

Design Document

firelight

DISABLE SIGNING CEREMONY AFTER PRE-SIGNATURE REVIEW

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iConnect 267762 Design Approach – Disable Signing Ceremony After Pre-Signature Review

Project Overview

This enhancement will prohibit advisors from sending an activity for the signing ceremony when Pre-Submit (Pre-Signature) process is enabled. They can send the application for Pre-Submit (Pre-Signature) Review but not for signing.

Impact:

- New group setting under “Submit” section on “App” tab.
- “Continue” button on activity navigation will be disabled when the new group setting is checked.

1. Group Setting to Disable Signing after Pre-Signature Review

Currently when a Pre-Signature review step is added for an activity, advisors can proceed for signing ceremony after the review process is complete. Requirement is to stop a user group to not be able to send the application for signatures after the review. For this a new group setting check box will be added as “Disable Continue after Pre-Signature Review” under “Submit” section on “App” tab.

Following is a mockup to display placement of the new group setting.

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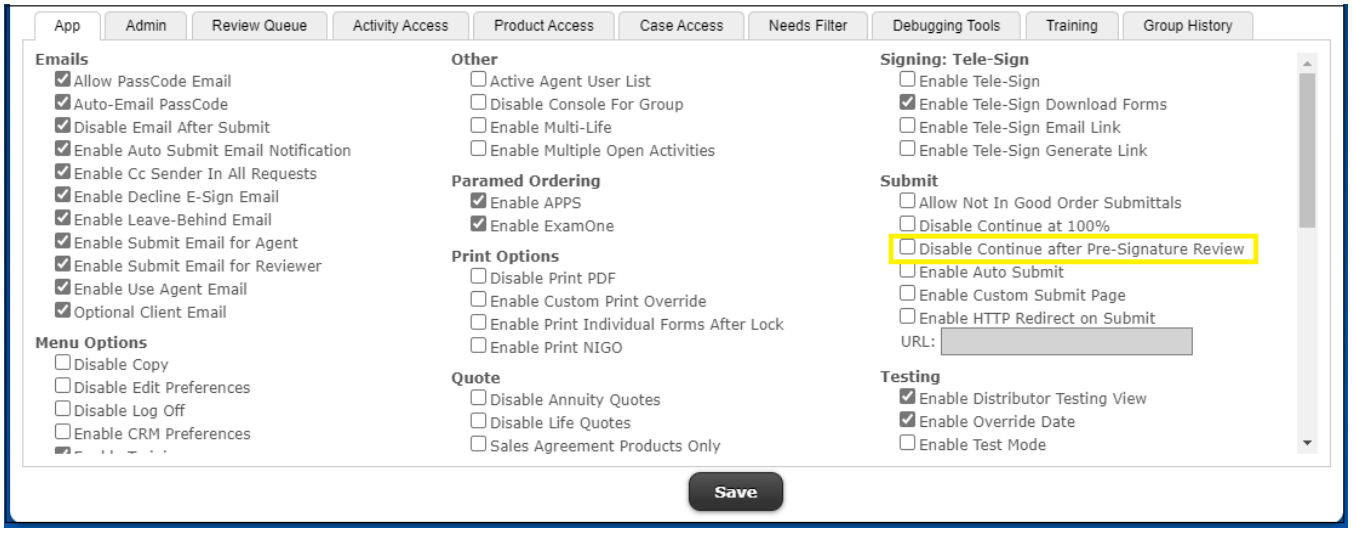

This new group setting “Disable Continue after Pre-Signature Review” will work as a toggle option with the group setting “Disable Continue at 100%”. Hence, if check box “Disable Continue after Pre-Signature Review” is checked, admin cannot check the setting “Disable Continue at 100%”, and vice-versa.

Acceptance Criteria

- New group setting check box "Disable Continue after Pre-Signature Review" is added on "App" tab under "Submit" section.
- By default, this check box is unchecked.
- New group setting works as a toggle with the group setting "Disable Continue at 100%".

2. Disable Continue button after Pre-Signature Review is Complete

When the group setting “Disable Continue after Pre-Signature Review” is checked, the advisor/user cannot enter the signing ceremony after the Pre-Signature review process is complete. The “Continue” button on the activity navigation bar will show disabled so that user cannot click it to move to the next step of signing ceremony.

Following mockup displays the application activity screen where Pre-Signature review is complete and “Continue” button is disabled.

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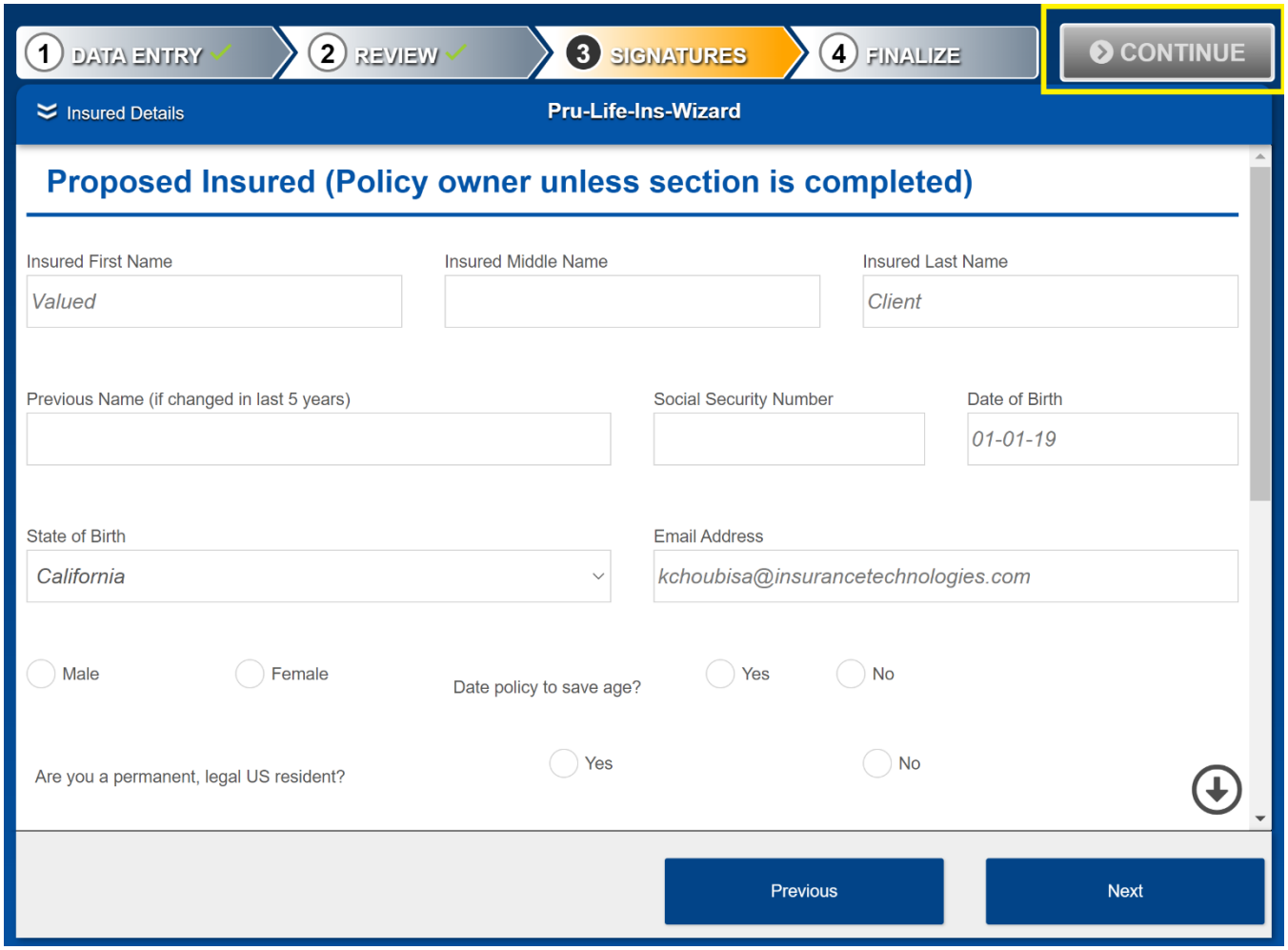

Use Case:

A Carrier has a set of RIA advisors that are expected to get an activity to the signature step without being able to kick off the signing ceremony. This was easy in the past since they could simply “Disable Submit at 100%” which would give the RIA enough permissions to complete the app without continuing to the next step. However, with the introduction of a pre-submit (pre-signature) review queue, the RIA now needs to be able to click “Continue” once they hit 100% to send the review request.

The carrier now wants to allow the RIA advisors to click “Continue” the first time to trigger the Review Queue but restrict their ability to hit “Continue” until after the review is approved. Our proposed solution was to simply disable the RIA’s ability to sign as both the Client and Agent which would prevent them from completing any signatures. They advised that this would not

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be good enough for their business workflow as they want to prevent the RIA from triggering the signing ceremony itself.

Acceptance Criteria

- When group setting "Disable Continue after Pre-Signature Review" is checked:
  - Once data entry is complete, user can click "Continue" button to submit for Pre-Submit (Pre-Signature) review.
  - Once Pre-Submit (Pre-Signature) review process is complete (Approved or Declined), user cannot continue to the signing ceremony process.

- When group setting "Disable Continue after Pre-Signature Review" is unchecked:
  - When data entry is complete, user can click "Continue" button to send the activity for Pre-Signature review and also for the signing ceremony after review process is complete.

- Disabling the "Continue" button will be applied on both MVC and REACT interfaces.

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