
Esign Corrections for 2.17

FIRELIGHT BASE



ESIGN CORRECTIONS FOR 2.17

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Design Approach - Esign Corrections for 2.17

During 2.17 a few issues were uncovered related to eSigning that will be corrected. Below is a high level review of the features being addressed.

1. Presentation of documents using document sets and initials
2. Script to address incorrect usage of the Group Name in the signature control
3. Multi-sign enhancements
4. Audit corrections

1 Audit Report Corrections

Update the audit report to correctly reflect page numbers being viewed and document set signatures collected. (See stories)

The current audit has some discrepancies:

- When Sign Now is used, no email is sent to initiate signing yet the Audit shows email was sent to begin signing.
- Page numbers are not correctly represented in the form. We need to switch from absolute page numbers to actual page numbers.



| Signing Ceremony for Payor, Joint Owner, and Owner (9dd8e86a-8b2a-4376-8377-5b0c789000ca) | | | |
|---|--------------------|-----------------------------|--|
| Timestamp (UTC) | Status | Event Type | Action Taken |
| 4/16/2020 21:33 | Pending Signatures | LexisNexis | FireLight made a web service call on behalf of Katherine_FLADIST to LexisNexis for the activity 'Sign4 - Lifetime Income' for the signer type . |
| 4/16/2020 21:34 | Pending Signatures | LexisNexis | FireLight completed a call to LexisNexis for the activity 'Sign4 - Lifetime Income' for the signer type Owner. The returned status was passed, with a CVI of 00, and a score of 3 with 0 diversionary questions. |
| 4/16/2020 21:34 | In Signatures | Begin Signing Ceremony | Signer 'Owner/Joint Owner/Payor' beginning signing ceremony. |
| 4/16/2020 21:34 | In Signatures | Page Displayed | Page 5 of form 'Application222' displayed. |
| 4/16/2020 21:34 | In Signatures | Form Selected | Form 'Fees and Expense Disclosure FIA Sample' selected. |
| 4/16/2020 21:34 | In Signatures | Page Displayed | Page 9 of form 'Fees and Expense Disclosure FIA Sample' displayed. |
| 4/16/2020 21:34 | In Signatures | Client E-Signature Approved | Activity 'Sign4 - Lifetime Income' was signed by 'MS' as 'Owner/Joint Owner/Payor' from within City 'ms'. |
| 4/16/2020 21:34 | In Signatures | Page Displayed | Page 5 of form 'Application222' displayed. |
| 4/16/2020 21:37 | In Signatures | Client E-Signature Approved | Activity 'Sign4 - Lifetime Income' was signed by 'BD Form' as 'Joint Owner' from within City 'BD Form'. |
| 4/16/2020 21:37 | In Signatures | Page Displayed | Page 1 of form 'BD Change - ITC' displayed. |
| 4/16/2020 21:37 | In Signatures | Client E-Signature Approved | Activity 'Sign4 - Lifetime Income' was signed by 'BD' as 'Owner' from within City 'BD'. |
| 4/16/2020 21:42 | Submit Requested | Link To Activity | An email containing a link to the completed activity was sent to 'BD' at address 'kdease@insurancetechnologies.com'. |

- Order of audits should match order or signing

- Document Set Signing will be reflected in the audit for each signature collection uniquely with the unique signature session ID for each document set signature collection (see below)

If MS is used the audit will have these changes:

- 1 email is sent for the sign to initiate MS remote sign, only 1 email should be listed in the audit.
- anytime MS is used, the roles included in the action will list all roles
- Document sets that apply to only one of the roles will be correctly represented in the audit

| | | |
|----------------------|---|-----------------|
| Signature Identifier | 9dd8e86a-8b2a-4376-8377-5bcc789000ca | Timeline |
| Signing as | Payor, Joint Owner, and Owner | 4/16/2020 21:34 |
| Captured Name | MS | |
| Captured State | Colorado | |
| Captured City Name | ms | |
| Captured Signature |  | |
| Signature Identifier | 9dd8e86a-8b2a-4376-8377-5bcciy888cd | Timeline |
| Signing as | Joint Owner | 4/16/2020 21:35 |
| Captured Name | MSsecond capture | |
| Captured State | Colorado | |
| Captured City Name | ms | |
| Captured Signature |  | |

1.1 Audit Report Corrections - document sets collected uniquely and in audit uniquely

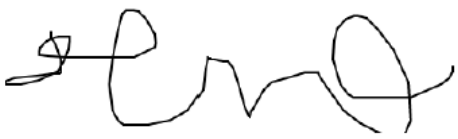

Update the audit report to correctly reflect each document set signature collection uniquely

(No impact should be made to eDelivery signing and eDelivery audits.)

If MS is selected, the header will list the roles selected.

- There will be a new line per role, per document set.
- Document Set Signing will be reflected in the audit for each signature collection uniquely with the unique signature session ID for each document set signature collection (see below)
- Initials which are part of Document Sets will also be uniquely listed in the audit reports.

- Document sets with MS will represent the role that the document review and signature applies. If the review applies to all MS parties, all parties for that document set signature collection will be shown; however, if the document set review/sign applies only to 1 of the selected MS roles, the audit will represent the role it applies to in the audit. (see example below)
- Each document set signature collection will have a unique Signature identifier that matches what is applied to the form.
- Each document set signature collection will have a unique set of collected details including: timeline, Signing as, Captured name, Captured state, Captured City Name, and Captured Signature.

| | | |
|----------------------|---|-----------------|
| Signature Identifier | 9dd8e86a-8b2a-4376-8377-5bcc789000ca | Timeline |
| Signing as | Payor, Joint Owner, and Owner | 4/16/2020 21:34 |
| Captured Name | MS | |
| Captured State | Colorado | |
| Captured City Name | ms | |
| Captured Signature |  | |
| Signature Identifier | 9dd8e86a-8b2a-4376-8377-5bcc78988cd | Timeline |
| Signing as | Joint Owner | 4/16/2020 21:35 |
| Captured Name | MSsecond capture | |
| Captured State | Colorado | |
| Captured City Name | ms | |
| Captured Signature |  | |

Acceptance Criteria

- If MS is selected, the header will list the roles selected.
- There will be a new line per role, per document set.
- Document Set Signing will be reflected in the audit for each signature collection uniquely with the unique signature session ID for each document set signature collection
- Initials which are part of Document Sets will also be uniquely listed in the audit reports.
- Document sets with MS will represent the role that the document review and signature applies. If the review applies to all MS parties, all parties for that document set signature collection will be shown; however, if the document set review/sign applies only to 1 of the selected MS roles, the audit will represent the role it applies to in the audit.

- Each document set signature collection will have a unique Signature identifier that matches what is applied to the form.
- Each document set signature collection will have a unique set of collected details including: timeline, Signing as, Captured name, Captured state, Captured City Name, and Captured Signature.
- To test this, you will need a form that has multiple Document sets FLADEMO, Lifetime Income Product, when you sign with Document sets, enter unique values in the signature collection so you can validate that the first signature collection matches what is in the form and in the audit. Example: Owner 1 city, owner 1 state, owner 1 signature then in the second document set for owner 2 city, owner 2 state, owner 2 signature.
- (No impact should be made to eDelivery signing and eDelivery audits.)

1.2 Audit reports/History - Reflect the roles for the signing session per document set

The Firelight Audit Report must correctly list the roles for who is signing per document set.

(No impact should be made to eDelivery signing and eDelivery audits.)

- If multi-sign is used, each selected role will be listed in the audit report during the signing session and the signing ceremony.
- The "Signing as" will reflect the roles and person for who is signing.
- If MS is selected, the header in the audit will list the roles selected.
- There will be a new line per role, per document set.
- If MS is selected and used for that signing session, the applied roles will display in the audit under "Signing as".
- The "action taken" will reflect who is signing.
- If MS is selected and used for that signing session, the applied roles will display in the audit under "action taken".
- FL supports selecting multiple roles where the people do not actually match. While this is not the intended usage, clients do not want to limit multi-sign by requiring a match. The use case for this is the owner is the parent (captured during signing session) and the insured is a minor child. The parent will be Multi-signing for the owner and the payor and the insured. In this scenario, the audit will still show role/role: name
- The pages viewed for that document set and that roles, must match the audit.


If document Sets are used:

- The "Signing as" will reflect who is signing for that document set.
- The "action taken" will reflect who is signing for that document set.
- If MS is selected and used for that signing session for that document set, the applied roles will display in the audit under "Signing as" and in the signing ceremony for the roles listed in "action taken".

- Each document set will be listed separately in the audit report

Example:

FireLight Packet Audit Report

| | | |
|------------------------|---|------------------|
| Incorrect Score: | 0 | |
| Diversions: | 3 | |
| Using IP Address | 10.131.5.51 | |
| Signature Identifier | d185f3d1-d489-4606-baf5-07c4199a51da | Timeline |
| Signing as | Owner and Payor | 10/30/2019 15:51 |
| Captured Name | Chris | |
| Captured State | Alabama | |
| Captured City Name | City | |
| Captured Signature |  | |
| Identity Check Type | Agent Verification | |
| Agent ID: | FLADEMO0330 | |
| Identification Type: | | |
| Identification Number: | | |
| Identification State: | | |
| Using IP Address | 10.131.5.51 | |

Signing Ceremony for Owner (5bcedc8c-b915-40df-9e19-901d22df32ed)

| Timestamp (UTC) | Status | Event Type | Action Taken |
|------------------|---------------|-----------------------------|---|
| 10/30/2019 15:50 | In Signatures | Begin Signing Ceremony | Signer Owner and Payor beginning signing ceremony. |
| 10/30/2019 15:50 | In Signatures | Page Displayed | Page 1 of form 'Application222' displayed. |
| 10/30/2019 15:50 | In Signatures | Form Acknowledged | Form 'Application222' acknowledged. |
| | | | |
| 10/30/2019 15:51 | In Signatures | Client E-Signature Approved | Activity 'New Application - Template Life Wizard' was signed by 'chris' as Owner and Payor from within City colorado springs' |

The history of the application will also need to reflect all roles that apply for that history audit.

- The "was Signed by" will reflect the person name and roles that apply to who is signing for that document set.
- Each document set will be listed separately in the History report.

| History | |
|-----------------------------|--|
| In Signatures | Activity 'New Application - Template Life Wizard' was signed by 'chris' as Owner and Payor from within City colorado springs |
| Client E-Signature Approved | |
| 11/11/2019 3:49:44 PM EST | |

Acceptance Criteria

- Ensure the Firelight Package Audit reports reflects the "Signing as" for the roles and person who is signing.
- If MS is selected, the header will list the roles selected.
- There will be a new line per role, per document set.
- If MS is selected and used for that signing session, the applied roles will display in the audit under "Signing as"
- Ensure the Firelight Package Audit reports reflects the "action taken" for the roles and person who is signing.
- If MS is selected and used for that signing session, the applied roles will display in the audit under "action taken".
- Ensure the Firelight Package Audit reports reflects the roles and person that applies for the document set.
- Ensure the Firelight Package Audit reports reflects the "Signing as" for each document set for the roles that apply to that DS.
- Ensure the Firelight Package Audit reports reflects the "action taken" for who is signing for that document set.
- (test this with a DS that applies to only one role in the MS selection. Validate that the audit only lists the 1 role that applies for that DS.)
- select multiple roles where the people do not actually match. FL will show role/role: name (captured during signing session)
-
- Ensure the FL history report, reflects the roles and the person signing.
- Verify History of application audit reflects the user has signed for multiple roles.
- The "was Signed by" will reflect the person name and roles that apply to who is signing for that document set.
- Each document set will be listed separately in the History report with the roles and person that apply for that document set.
- The pages viewed for that document set and that roles, must match the audit.
- (No impact should be made to eDelivery signing and eDelivery audits.)

1.3 Audit Report Corrections - page numbers reflected in audit

Update the audit report to correctly reflect page numbers being viewed and signatures/initials on the correct page.

- The audit will show all of the pages viewed and the signature / initial on page x. Today, FL audit shows the pages viewed but it is using absolute page numbers.

(No impact should be made to eDelivery signing and eDelivery audits.)

- Page numbers are not correctly represented in the form. We need to switch from absolute page numbers to relative page numbers.
- FL will record the pages viewed in the audit using the actual form pages.
- If the client immediately acknowledges the form without scrolling between pages, FL will list page 1 was viewed of form xxx.
- A separate audit will record the signature / initial on page x.

Examples:

Assume an application has 1 form with 4 pages and the signature is on the last page. If the signer immediately acknowledges the form, the audit will show page 1 of the form was viewed, the form was acknowledged, and the application was signed on page 4, all in that order. If they viewed pages 1-3, the audit would contain, page 1 viewed, page 2 viewed, page 3 viewed, form acknowledged, application signed on page 4.

- The pages viewed for that document set and that roles, must match the audit.

| Signing Ceremony for Payor, Joint Owner, and Owner (9dd8e86a-8b2a-4376-8377-5bcc789000ca) | | | |
|---|--------------------|-----------------------------|--|
| Timestamp (UTC) | Status | Event Type | Action Taken |
| 4/16/2020 21:33 | Pending Signatures | LexisNexis | FireLight made a web service call on behalf of Katherine_FLADIST to LexisNexis for the activity 'Sign4 - Lifetime Income' for the signer type . |
| 4/16/2020 21:34 | Pending Signatures | LexisNexis | FireLight completed a call to LexisNexis for the activity 'Sign4 - Lifetime Income' for the signer type Owner. The returned status was passed, with a CVI of 00, and a score of 3 with 0 diversionary questions. |
| 4/16/2020 21:34 | In Signatures | Begin Signing Ceremony | Signer 'Owner/Joint Owner/Payor' beginning signing ceremony. |
| 4/16/2020 21:34 | In Signatures | Page Displayed | Page 5 of form 'Application222' displayed. |
| 4/16/2020 21:34 | In Signatures | Form Selected | Form 'Fees and Expense Disclosure FIA Sample' selected. |
| 4/16/2020 21:34 | In Signatures | Page Displayed | Page 9 of form 'Fees and Expense Disclosure FIA Sample' displayed. |
| 4/16/2020 21:34 | In Signatures | Client E-Signature Approved | Activity 'Sign4 - Lifetime Income' was signed by 'MS' as 'Owner/Joint Owner/Payor' from within City 'ms'. |
| 4/16/2020 21:34 | In Signatures | Page Displayed | Page 5 of form 'Application222' displayed. |
| 4/16/2020 21:37 | In Signatures | Client E-Signature Approved | Activity 'Sign4 - Lifetime Income' was signed by 'BD Form' as 'Joint Owner' from within City 'BD Form'. |
| 4/16/2020 21:37 | In Signatures | Page Displayed | Page 1 of form 'BD Change - ITC' displayed. |
| 4/16/2020 21:37 | In Signatures | Client E-Signature Approved | Activity 'Sign4 - Lifetime Income' was signed by 'BD' as 'Owner' from within City 'BD'. |
| 4/16/2020 21:42 | Submit Requested | Link To Activity | An email containing a link to the completed activity was sent to 'BD' at address 'kdease@insurancetechnologies.com'. |

Acceptance Criteria

- Page numbers are represented in the audit and match the real page numbers in the form.
- The audit will show the pages viewed in the audit using the actual form pages.
- If the client immediately acknowledges the form without scrolling between pages, FL will list page 1 was viewed of form xxx.

- If the “Acknowledge All Forms” is checked, the audit will show Page 1 was viewed, then we will indicate “All forms acknowledged” (hold)
- A separate audit will record the signature / initial on page x.
- If the form has 4 pages and the client has initials on page 2 and 4, the audit will show client initialed on page 2 and page 4.
- The pages viewed for that document set and that roles, must match the audit.
- (No impact should be made to eDelivery signing and eDelivery audits.)

1.4 Audit Report Corrections - emails being sent

Update the audit report to correctly reflect emails being sent to clients.

(No impact should be made to eDelivery signing and eDelivery audits.)

- When Sign Now is used, FL does not send an email to initiate signing. The audit should not list that an email was sent to initiate signing when SignNow is used. The audit should list Sign Now is initiated.
- When Generate Link without email is used, FL does not send an email to initiate signing. The audit should not list that an email was sent to initiate signing when SignNow is used. The audit should list Generate Link without email is initiated.
- When Sign Later is used, FL does send an email to initiate signing. The audit should list that an email was sent to for role x, y, and z to initiate signing.


Acceptance Criteria

- When Sign Now is used, FL does not send an email to initiate signing.
- The audit should list Sign Now used to initiate signing for person, role X.
- When Generate Link without email is used, FL does not send an email to initiate signing.
- The audit should list Generate Link without email is use to initiate signing for person, role X.
- When Sign Later is used, FL does send an email to initiate signing. The audit should list that an email was sent to person name, for role x, y, and z to initiate signing.
- (No impact should be made to eDelivery signing and eDelivery audits.)

1.5 Audit Report Signature Initials

(No impact should be made to eDelivery signing and eDelivery audits.)

- Initials require at least 1 signature control in the same form and that the same group name must be used as the role in the associated signature control. Doing this will group the initial ahead of the signature but in the same document set. The audit will represent the initial is captured in the "Captured Initials"

| Signature Summary | | |
|----------------------|---|-----------------|
| Signature Identifier | 2e1a225e-7b01-47df-9c55-3c61b97589e3 | Timeline |
| Signing as | Owner | 4/30/2020 21:02 |
| Captured Name | test | |
| Captured State | Alabama | |
| Captured City Name | test | |
| Captured Signature |  | |
| Captured Initial | KD | |

KD Initials Karen Bohen
Page 1 of 3

- The signing ceremony details will list the client initials and/or agent initials.

| Signing Ceremony for Owner (2e1a225e-7b01-47df-9c55-3c61b97589e3) | | | |
|---|---------------------------|------------|---|
| Timestamp (UTC) | Status | Event Type | Action Taken |
| 4/30/2020 21:00 | PreSubmit Review Complete | LexisNexis | FireLight made a web service call on behalf of Katherine_FLADEMO to LexisNexis for the activity 'KD Initials Karen Bohen' for the signer type . |
| | PreSubmit Review | | |

KD Initials Karen Bohen
Page 2 of 3

FireLight Packet Audit Report

| | | | |
|-----------------|---------------|-----------------------------|---|
| 4/30/2020 21:00 | Complete | LexisNexis | FireLight completed a call to LexisNexis for the activity 'KD Initials Karen Bohen' for the signer type Owner. The returned status was FAIL, with a CVI of N/A, and a score of 0 with 3 diversionary questions. |
| 4/30/2020 21:00 | In Signatures | Begin Signing Ceremony | Signer 'Owner' beginning signing ceremony. |
| 4/30/2020 21:01 | In Signatures | Page Displayed | Page 1 of form 'Application222' displayed. |
| 4/30/2020 21:01 | In Signatures | Page Displayed | Page 2 of form 'Application222' displayed. |
| 4/30/2020 21:01 | In Signatures | Page Displayed | Page 3 of form 'Application222' displayed. |
| 4/30/2020 21:01 | In Signatures | Page Displayed | Page 4 of form 'Application222' displayed. |
| 4/30/2020 21:01 | In Signatures | Client Initials | Activity KD Initials Karen Bohen was initiated by 'KD' as 'Owner'. |
| 4/30/2020 21:01 | In Signatures | Page Displayed | Page 5 of form 'Fees and Expense Disclosure FIA Sample' displayed. |
| 4/30/2020 21:02 | In Signatures | Leave-Behind Email Sent | An email containing a link to the signed activity documents was sent to 'test' at address 'kdease@insurancetechnologies.com'. |
| 4/30/2020 21:02 | In Signatures | Client E-Signature Approved | Activity 'KD Initials Karen Bohen' was signed by 'test' as 'Owner' from within City 'test'. |
| 4/30/2020 21:03 | In Signatures | Page Displayed | Page 1 of form 'Application222' displayed. |
| 4/30/2020 21:03 | In Signatures | Page Displayed | Page 2 of form 'Application222' displayed. |
| 4/30/2020 21:03 | In Signatures | Page Displayed | Page 3 of form 'Application222' displayed. |
| 4/30/2020 21:03 | In Signatures | Page Displayed | Page 4 of form 'Application222' displayed. |
| 4/30/2020 21:03 | In Signatures | Leave-Behind Email Sent | An email containing a link to the signed activity documents was sent to 'test' at address 'kdease@insurancetechnologies.com'. |
| 4/30/2020 21:03 | In Signatures | Client E-Signature Approved | Activity 'KD Initials Karen Bohen' was signed by 'test' as 'Owner' from within City 'test'. |

History Example of Initials:

| History | |
|---|---|
| In Signatures Leave-Behind Email Sent 4/30/2020 6:35:28 PM EDT | An email containing a link to the signed activity documents was sent to 'test' at address 'kdease@insurancetechnologies.com'. |
| In Signatures Form Acknowledged 4/30/2020 6:35:21 PM EDT | Form 'Application222' acknowledged. |
| In Signatures Page Displayed 4/30/2020 6:35:19 PM EDT | Page 3 of form 'Application222' displayed. |
| In Signatures Client E-Signature Approved 4/30/2020 6:35:17 PM EDT | Activity 'KD Initials 2 Karen Bohen' was signed by 'test' as 'Owner' from within City 'test'. |
| In Signatures Leave-Behind Email Sent 4/30/2020 6:35:17 PM EDT | An email containing a link to the signed activity documents was sent to 'test' at address 'kdease@insurancetechnologies.com'. |
| In Signatures | Form 'Electronic Consent' acknowledged. |

History

In Signatures

Page 1 of form `VA One Application_2_20_2020` displayed.

Page Displayed

3/5/2020 10:22:55 AM MST

In Signatures

Activity New Application - Multi Signer Test Product-With Initials - JET was initiated by `sdf as Owner`.

Client Initials

3/5/2020 10:22:53 AM MST

In Signatures

Activity New Application - Multi Signer Test Product-With Initials - JET was initiated by `sdf as Annuitant`.

Client Initials

3/5/2020 10:22:52 AM MST

In Signatures

Form `VA One Application_2_20_2020` acknowledged.

Form Acknowledged

3/5/2020 10:22:51 AM MST

Audit Report Example:

| | | | |
|----------------|---------------|-----------------|--|
| | | | displayed. |
| 3/5/2020 17:19 | In Signatures | Client Initials | Activity New Application - Multi Signer Test Product-With Initials - JET was initiated by `sdf as Owner` |
| 3/5/2020 17:19 | In Signatures | Client Initials | Activity New Application - Multi Signer Test Product-With Initials - JET was initiated by `sdf as Annuitant` |

Acceptance Criteria

- (No impact should be made to eDelivery signing and eDelivery audits.)
- Add an initial to a form that has at least 1 signature control and set the same group name in the initial as the role in the associated signature control. Validate that the initial is ahead of the signature but in the same document set.
- The audit will represent the initial is captured in the "Captured Initials"
- The signing ceremony details will list the client initials and/or agent initials.
- The initials are before the form's associated signature control and the audit represents the initial and then the signature.
- The activity history includes the initials captured (In Signature Client Initials) and then the signature (In Signature Client E-Signature Approved).

1.6 Create new Audit entries for each signing role

Create new audit entries for each signing role so that we can correctly reflect the audit for each signer during Multi-sign and for each unique document set.

If MS is selected, then the audit entry for the Client e-signature approved date and timestamp for all of the roles will match the signature stamps.

Acceptance Criteria

- - Each role will have a new location in the audit with the associated signature identifier, the timeline date, and the captured details per document set.
- - Each role will have the time stamps that match the form signature stamps (collected signature, esigned by, timestamp)

2 2.17 fixes - Improve Signature/Review process when multi-sign is used

This feature will cover enhancements to Multi-Sign. (multiple roles are selected during the signing ceremony. This option is supported when the group setting is checked.)

1. Combine the review and signing for the selected roles
 - When MS is enabled and multiple roles are selected for signing, the signing session will combine the document review for the roles selected. Currently in Firelight, if the user has selected more than one role for signing, the user is required to review and acknowledge each form for each role.
 - When MS is enabled and multiple roles are selected for signing and there are multiple document sets, the signing session will combine the document review for the roles selected for each document set.
 - The review pane will show the signature controls that are active for the selected roles that apply to that document set. Meaning, if I select owner and payor and the document set has tags on the form for both the owner and payor, I will see the owner and the payor yellow signature control in the review pane.
2. Add labeling throughout the signing ceremony for the selected roles
 - Throughout the signing process of the activity, FL will list the signer name and the roles selected for that document set. Meaning, if I select owner and payor and the document set has tags on the form for both the owner and payor, the label on the screen will show role/role, name.
3. Emails for the multiple selected roles are combined into one email with all of the documents that applied to the selected roles.

Impacts:

- E-Signature - allowing multiple roles to be signed for one person when using the "Enable single user to sign multi-signer types"
- Signing review - consolidate the review process so that the multiple roles will be combined into 1 review and signing workflow.
- Screen labels during esign - The screens and audit will be labeled to represent the multiple roles.
- Emails - emails will be consolidated into one email when multiple roles are selected. This email will contain ONE link for the user to access the application.
- Application Audit report - all multiple roles will be listed for the signer.

2.1 Document Presentation

Combine the review and signing for the selected roles

- When Single sign is used to sign for a single role, the signing session will only contain forms for the selected role.
- When Single sign is used to sign for a single role and there are multiple document sets, the signing session will combine the document review for the matching group name fields into a document set.
- If there are multiple document sets (determined by group name), present the document sets in this order (number, then alphabetical, then blank). Initials are presented in the associated group name document set ahead of the signatures.
- When deployed, we will honor the document sets and the order.
- So, if the user signs in AdvisorExcel's environment who uses a Null Group Name and then they select an AIG product where AIG uses 1Consent and Application in their group names and has Initials with the group name of Application; the sequence presented would be document sets with a number first (1Consent), then alphabetic order (Application), then document sets with no group name (Any AIG forms and distributor forms that have no group name). Initials are presented in the associated group name document set ahead of the signatures.
- The review pane will show the signature controls that are active for the selected role that apply to that document set. Meaning, if I select a single role of owner and the document set has tags on the form for both the owner and payor, I will see only the selected role of owner and yellow signature control in the review pane for the owner.
- When MS is enabled and multiple roles are selected for signing, the signing session will combine the document review for the roles selected. Currently in Firelight, if the user has selected more than one role for signing, the user is required to review and acknowledge each form for each role.
- When MS is enabled and multiple roles are selected for signing and there are multiple document sets, the signing session will combine the document review for the roles selected for each document set.
- The review pane will show the signature controls that are active for the selected roles that apply to that document set. Meaning, if I select owner and payor and the document set has tags on the form for both the owner and payor, I will see the owner and the payor yellow signature control in the review pane.
- The same results should occur regardless of using SignNow, Remote Sign, or Generate Link.
- The same results should occur regardless of the group setting being checked.
- The same results should occur regardless of who signs first.

| | | | |
|----------------------------|------------------------------------|----------------------------|--|
| <input type="checkbox"/> % | Wilshire Large Co Growth | <input type="checkbox"/> % | Fidelity VIP Money Market Portfolio – Initial Class |
| <input type="checkbox"/> % | Delaware US Growth | <input type="checkbox"/> % | Ibbotson Aggressive Growth ETF Asset Allocation |
| <input type="checkbox"/> % | Fidelity VIP Growth SC2 | <input type="checkbox"/> % | Ibbotson Balanced ETF Asset Allocation Portfolio |
| <input type="checkbox"/> % | Goldman Sachs Concentrated Growth | <input type="checkbox"/> % | Ibbotson Conservative ETF Asset Allocation Portfolio |
| <input type="checkbox"/> % | Goldman Sachs VIT Mid Cap Value | <input type="checkbox"/> % | Ibbotson Growth ETF Asset Allocation Portfolio |
| <input type="checkbox"/> % | Jennison Large Cap Growth | <input type="checkbox"/> % | Vanguard VIF – Balanced Portfolio |
| <input type="checkbox"/> % | Loomis Sayles Large Cap Growth | <input type="checkbox"/> % | Vanguard VIF – High Yield Bond Portfolio |
| <input type="checkbox"/> % | MFS Growth | <input type="checkbox"/> % | Vanguard VIF – International Portfolio |
| <input type="checkbox"/> % | Neuberger Berman Mid Cap Growth | <input type="checkbox"/> % | Vanguard VIF – Mid-Cap Index Portfolio |
| <input type="checkbox"/> % | Rainier Small/Mid Cap Equity | <input type="checkbox"/> % | Vanguard VIF – REIT Index Portfolio |
| <input type="checkbox"/> % | T.Rowe Price Equity Inc Port VIPII | <input type="checkbox"/> % | Vanguard VIF – Total Bond Market Index Portfolio |
| <input type="checkbox"/> % | T.Rowe Price Large Cap Growth | <input type="checkbox"/> % | Vanguard VIF – Total Stock Market Index Portfolio |
| <input type="checkbox"/> % | Wells Fargo Advantage Discovery | <input type="checkbox"/> % | Total (must equal 100%) |

E-DOCUMENTS

By providing my e-mail address below, and my signing of this application, I consent to receive and accept documents electronically during the duration of my variable annuity contract. These documents include, but not limited to: account statements, confirmations, privacy notices, tax documents, prospectuses and prospectus supplements, annual and semi-annual reports, proxy statements and correspondence. This consent will continue unless and until I revoke my consent by notifying Insurance Technologies at which point I will begin to receive documents by mail.

EMAIL: _____

SIGNATURES

I agree that the information provided above in full, complete and true to the best of my knowledge. I understand that contract values that are based on the separate account assets are not guaranteed and will decrease or increase with investment experience.

Owner SIGNING HERE

SIGNATURE OF OWNER/CUSTODIAN/TRUSTEE

Owner SIGNING HERE Owner SIGNING HERE Owner SIGNING HERE

CITY AND STATE SIGNATURE DATE

Payor SIGNING HERE

SIGNATURE OF AGENT/PRODUCER (1)

STATE LICENSE #

PERCENTAGE

Acceptance Criteria

- The same results should occur regardless of using SignNow, Remote Sign, or Generate Link.
- The same results should occur regardless of the group setting being checked.
- The same results should occur regardless of who signs first.
- Single sign presentation
- When Single sign is used to sign for a single role, the signing session will only contain forms for the selected role.
- When Single sign is used to sign for a single role and there are multiple document sets, the signing session will combine the document review for the matching group name fields into a document set.
- If there are multiple document sets (determined by group name), present the document sets in this order (number, then alphabetical, then blank). So, if the user signs in AdvisorExcel's environment who uses a Null Group Name and then they select an AIG product where AIG uses 1Consent and Application in their group names and Initials have document name of

Application in the application form, the sequence presented would be document sets with a number first (1Consent), then alphabetic order (Application) with the initials first and then the signature, then document sets with no group name (Any AIG forms and distributor forms that have no group name).

- The review pane will show the signature controls that are active for the selected role that apply to that document set. Select a single role of owner and the document set has tags on the form for both the owner and payor, I will see only the selected role of owner and yellow signature control in the review pane for the owner
- Multi-sign presentation
- When MS is enabled and multiple roles are selected for signing, the signing session will combine the document review for the roles selected.
- When MS is enabled and multiple roles are selected for signing and there are multiple document sets, the signing session will combine the document review for the roles selected for each document set.
- The review pane will show the signature controls that are active for the selected roles that apply to that document set. Meaning, if I select owner and payor and the document set has tags on the form for both the owner and payor, I will see the owner and the payor yellow signature control in the review pane.
- Validate that we combine the review and signing when there are different document sets on the forms per role. Example:
 - Consent (Payor must sign and Owner must sign) 1Consent – group name for all signature tags; so, the consent would be signed separately from the other forms.
 - Application 222 - no group name (Owner must sign)
 - 1035 form - no group name (Owner must sign)
- If single sign is selected using the above, the owner would have 2 Document sets with consent first and then application 222 and 1035 form. If single sign is selected for the payor, the payor would have 2 Document sets with consent first and then application 222 and 1035 form.
- If MS is selected using the above, 2 Document sets would still appear with consent first and then application 222 and 1035 form. The owner and payor as a MS role will only have to review the consent form 1 time and collect their signature 1 time. The second document set since only the owner role has forms, the header will show only the Owner role and the audit will show only the owner role.
- When deployed, we will honor the document sets and the order. If there are multiple document sets (determined by group name), present the document sets in this order (number, then alphabetical, then blank). So, if the user signs in AdvisorExcel's environment who uses a Null Group Name and then they select an AIG product where AIG uses 1Consent and Application in their group names, the sequence presented would be document sets with a number first (1Consent), then alphabetic order (Application), then

document sets with no group name (Any AIG forms and distributor forms that have no group name).

2.2 Create Replacement text on Downloaded Completed Application email

FL needs to support replacement text of the signer role <SIGNER_ROLE> so the emails can clearly identify the roles for the email. The replacement text should be available for other email templates. The email templates that this will apply to are the email to initiate signing (Signature Request), the Downloaded Completed Application email, the Client Signed and Approved the application, Client Signed and Declined the application, leave behind email, expiration notification emails

Dear <CLIENT_NAME>,

Thank you for applying for '<PRODUCT_NAME>' of <COMPANY_NAME>.

You have signed for <SIGNER_ROLE>.

To download or print the completed application, please click on the link at the bottom of the email. You will be asked for your birth date and the last 4 digits of your social security number.

If you have questions please contact your producer.

To download or print your completed application, click on <URL_LINK>, Enter the last 4 digits of your SSN, and birth date. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of new browser window.

Example:

Dear chris,

Thank you for signing the application for 'Template Life Wizard' of FL Access Carrier.

You have signed for the roles of Owner and Payor.

To download or print the signed documents, please click on the link at the bottom of the email. You will be asked for your birth date and the last 4 digits of your SSN to login.

If you have questions please feel free to contact me.

Sincerely,

Chris Henry

To download or print signed application documents, click on <https://firelight.insurancetechnologies.com/h1m> and enter the last 4 digits of your SSN and your birth date. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of a new browser window.

Acceptance Criteria

- Apply <SIGNER_ROLE> to the Signature Request, the Downloaded Completed Application email, the Client Signed and Approved the application, Client Signed and Declined the application, leave behind email, expiration notification emails. Sign using multi-sign and validate that the selected roles for MS are listed in the email name.
- Apply <SIGNER_ROLE> to the Signature Request, the Downloaded Completed Application email, the Client Signed and Approved the application, Client Signed and Declined the application, leave behind email, expiration notification emails. Sign using single sign and validate that the single role is listed in the email name.

2.3 Confirmation emails

When MS is used, FL will need to consolidate emails for the multiple roles selected. FL will need to ensure the link sent to initiate signing applies to the multi-selected roles. FL will need to ensure the link sent to retrieve completed and signed forms contain the documents that applied to each of the roles.

Acceptance Criteria

- When MS is used, FL will consolidate emails for the multiple roles selected and only send 1 email to initiate the signing.
- When MS is used, FL will consolidate emails for the multiple roles selected and only send 1 email to retrieve completed and signed forms.
- The completed and signed forms contain the documents that applied to each of the selected roles.

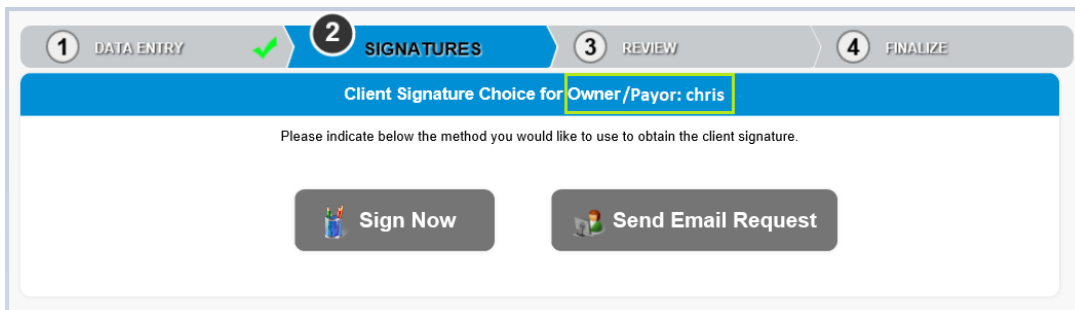
2.4 Disclosure and Labels to indicate the roles signing

Through disclosure/labeling in the signature process, the individual signing will know what roles they are signing for relative to the signing session for the document set. The screen headers will be updated with the selected roles for the signing ceremony.

FL supports selecting multiple roles where the people do not actually match. While this is not the intended usage, clients do not want to limit multi-sign by requiring a match. The use case for this is the owner is the parent and the insured is a minor child. The parent will be Multi-signing for the owner and the payor and the insured. In this scenario, we need to define how the display will show. Due to space and the fact that firms should be selected people that match, FL will show the selected roles and only the first name associated with the first role. So, role/role: name of the first person listed on the signing screen. Then, in the audit show the role/role: client name (data entered during signing).

Upon completion of the signing ceremony when the user returns to retrieve completed and signed forms, the header will be updated with the selected roles for the signing ceremony.

Example when roles of Owner and Payor are selected to multi-sign.



The screenshot shows a four-step process bar at the top: 1 DATA ENTRY (with a green checkmark), 2 SIGNATURES (highlighted in blue), 3 REVIEW, and 4 FINALIZE. Below the bar, a blue header bar displays 'Client Signature Choice for Owner/Payor: chris'. Underneath this, a text prompt reads 'Please indicate below the method you would like to use to obtain the client signature.' At the bottom of the form area are two buttons: 'Sign Now' (with a person icon) and 'Send Email Request' (with an envelope icon).

1 DATA ENTRY
2 SIGNATURES
3 REVIEW
4 FINALIZE

Agent Identification Verification

Agent ID: FLADEMO0310

Owner / Payor: chris - Client Identification Verification

Form of Identification: Drivers License
ID Issue Jurisdiction: Alabama
ID Number:
Name: Karen Bohen
Last 4 Digits of SSN/Government ID: 5808
Birth Date: 02/27/1961
Email Address:

Verified
Cancel

1 DATA ENTRY
2 SIGNATURES
3 REVIEW
4 FINALIZE

Owner / Payor: chris Signature

Before signing, you must review all pages of each of the 1 documents below.

Please click the buttons below to proceed.

➡ Application222

☐ I have reviewed and agree with the terms expressed within this document.

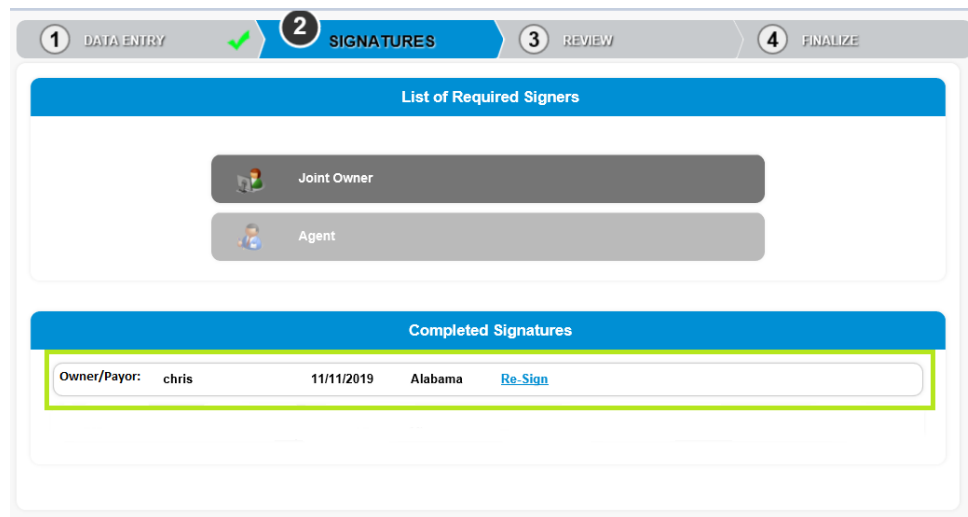
Application222 - Page 1 of 4

SAMPLE / TRAINING PURPOSES ONLY

VARIABLE ANNUITY APPLICATION

FireLight
Electronic fulfillment simplified

| PARTICIPANTS | BENEFICIARIES | OWNERSHIP | INVESTMENT ALLOCATIONS |
|---|---------------|--|------------------------|
| OWNER | | | |
| NAME (first Middle Initial, last) Karen Bohen | | SSN/TIN XXXXX5808 | |
| ADDRESS (number and street, city, state, zip) 10759 115TH ST Pacific Palisades CA 90272 | | PHONE NO. (include area code) 2085551212 | |
| MAILING ADDRESS (if different) GENDER <input type="checkbox"/> M <input type="checkbox"/> F | | MARITAL STATUS | |
| DATE OF BIRTH 2/27/1961 1:00:00 AM | | TRUST <input type="radio"/> Yes <input type="radio"/> No kdease@insurancetechnologies.com | |
| JOINT OWNER (Only complete if there is more than one Owner.) | | | |



1 DATA ENTRY 2 SIGNATURES 3 REVIEW 4 FINALIZE

List of Required Signers

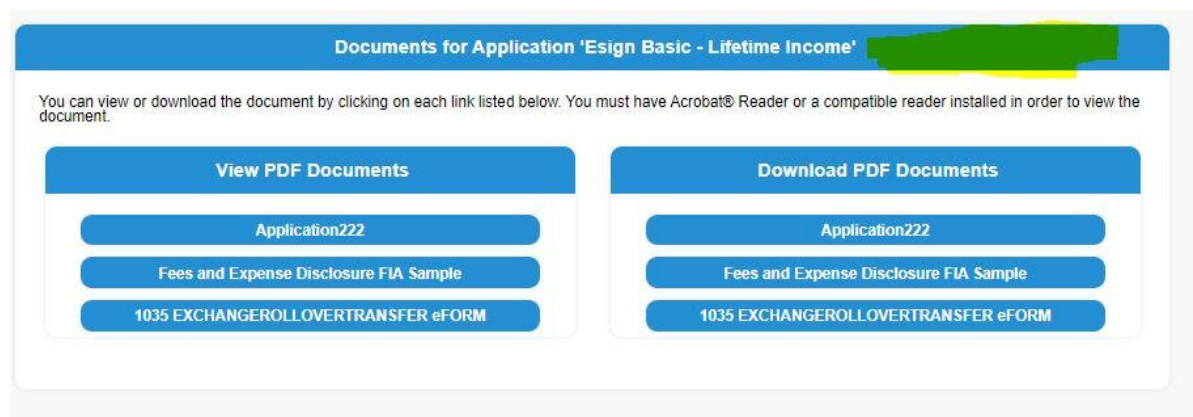
Joint Owner

Agent

Completed Signatures

| | | | | |
|--------------|-------|------------|---------|-------------------------|
| Owner/Payor: | chris | 11/11/2019 | Alabama | Re-Sign |
|--------------|-------|------------|---------|-------------------------|

This is the screen that appears after the user clicks on the email to retrieve their documents. This screen should have the header updated to include the role: name.



Documents for Application 'Esign Basic - Lifetime Income' [Redacted]

You can view or download the document by clicking on each link listed below. You must have Acrobat® Reader or a compatible reader installed in order to view the document.

View PDF Documents

Application222

Fees and Expense Disclosure FIA Sample

1035 EXCHANGEROLLOVERTRANSFER eFORM

Download PDF Documents

Application222

Fees and Expense Disclosure FIA Sample

1035 EXCHANGEROLLOVERTRANSFER eFORM

Acceptance Criteria

- The client signature choice screen header will be updated with the selected roles, client name for the signing ceremony.
- The agent verification screen header will be updated with the selected roles, client name for the signing ceremony.

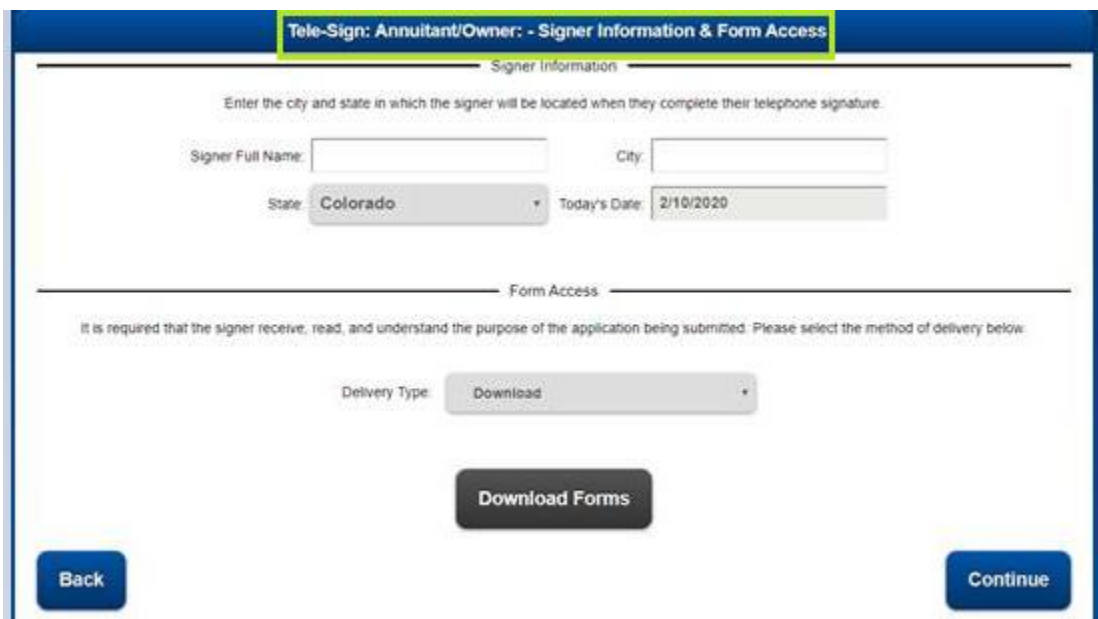
- The screen headers during the signing ceremony contain the selected roles that apply to that document set. (Example: MS was selected for owner and payor. document set 1 only has the owner signature tag. Document set 2 has the owner and payor signature tag. The header for document set 1 will show owner, name. The header for document set 2 will show owner/payor, name.)
- I can select multiple roles where the people do not actually match. In the client signature choice, agent verification, signing ceremony, and completed signatures, FL will show only the first name listed in the Multi-sign in the headers. Example: role/role: name. Then, in the audit show the role/role: client name (client name entered in the signing ceremony.)
- The screen for the pickup of signed and completed documents has the header with role: name or Role/role:name for multi-sign.

2.5 Ensure all enhancements to the Multi-Sign are updated in the Tele-Sign process

With the enhancements that are being implemented to the signing ceremony for Multi-Sign, we will want to ensure that these changes flow to the Tele-Sign process as well. This will need to include the following areas of the telesign process:

Disclosure and Labeling:

- As with the esign process, Telesign must inform the user on what roles are being signed for. The examples above shows the Annuitant and Owner are signing in the highlighted section.



Tele-Sign: Annuitant/Owner - Signer Information & Form Access

Signer Information

Enter the city and state in which the signer will be located when they complete their telephone signature.

Signer Full Name: City:

State: Today's Date:

Form Access

It is required that the signer receive, read, and understand the purpose of the application being submitted. Please select the method of delivery below:

Delivery Type:




Download Forms

Back **Continue**

1 DATA ENTRY
2 SIGNATURES
3 REVIEW
4 FINALIZE

Client Signature Choice for Annuitant/Owner : Jane Client

Please indicate below the method you would like to use to obtain the client signature.

 **Sign Now**
 **Send Email Request**
 **Tele-Sign**

1 DATA ENTRY
2 SIGNATURES
3 REVIEW
4 FINALIZE

Tele-Sign: Annuitant/Owner: Jane Client - Signer Information & Form Access

Signer Information

Enter the city and state in which the signer will be located when they complete their telephone signature.

Signer Full Name:

City:

State:

Colorado

Today's Date:

2/10/2020

Form Access

It is required that the signer receive, read, and understand the purpose of the application being submitted. Please select the method of delivery below.

Delivery Type:

Download

Download Forms

Back

Continue

Acceptance Criteria

- Disclosures will be reflected in the header that the user is signing for Multiple roles, i.e. Annuitant/Owner

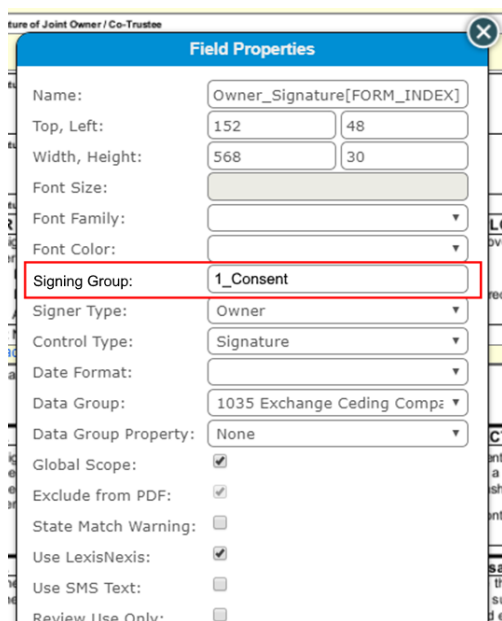
3 Document Set Refactor

It is necessary to make some changes to the implementation of Document Sets to assure consistent use regardless of signing process and to clarify the proper use of controls impacting the functionality of Document Sets. It will also be necessary to provide a migration path for existing implementation to convert from inappropriate field property settings that will negatively impact the user experience going forward.

Document Sets are controlled by the Group Name field in the Field Properties dialog.

Recommendation: Rename Group Name to Signing Group as it is more descriptive of its function

- If documents, or groups of documents must be signed separately and sequentially, the naming of the Signing Group is the tool used to identify, group, and order that sequential signing process.
- Ordering of Signing Groups can be controlled by adding an alphabetical or numeric prefix to the Document Set Name.
- Example: If an organization must have signatures captured separately for the following document types in the following order Consent, Application, Replacement, then the Signing Group name fields would need to be named in a fashion similar to this 1_Consent, 2_Application, 3_Replacement.
- Null in the Group Name field is valid. If other Group Names exist, Signature controls with Null would be seen in a separate document set. Null Group Names will precede document sets with Non-Null Group Names



The screenshot shows the 'Field Properties' dialog box for a signature field. The 'Signing Group' field is highlighted with a red rectangle and contains the text '1_Consent'. Other fields include Name (Owner_Signature[FORM_INDEX]), Top, Left (152, 48), Width, Height (568, 30), Font Size, Font Family, Font Color, Signer Type (Owner), Control Type (Signature), Date Format, Data Group (1035 Exchange Ceding Comp), Data Group Property (None), Global Scope (checked), Exclude from PDF (checked), State Match Warning (unchecked), Use LexisNexis (checked), Use SMS Text (unchecked), and Review Use Only (unchecked).

- Over the past several years, the Signing Group (Group Name) field has been used inappropriately. Form admins were trained to essentially duplicate the field name as the Group Name. Based on the designed functionality of this field, doing so will result in a large number of completely unnecessary document sets in a multi-sign scenario. Unless steps are taken to correct past mistakes and bring the naming of Signing Groups into compliance with the methods outlined above, a very cumbersome and unnecessary signing process will result.
- Varies by group name – ignore non-signature type controls for creation of document sets,
- If a different group name exists, we will create a different document set
- Data group name for all control types should be the same: (Control types: city, state, and date)
- Correcting script should remove the group names for the control types of Signature, City, State, State, Date, and Initials.
- Ignore clients identified for exclusion. Those include clients that are using Group name with 1Consent, 1Prospectus, Application, Replacement, etc.
- Changes must be applied to the meta data for locked down orders.
- Evaluation script to be run for all carriers to detail the tag. Then we have to evaluate each carrier to determine if they are using it incorrectly using this group name. Then, for each client, we need to update the dev script to remove the group names per their requirements.
- Need to coordinate all steps above with the impacted client

3.1 Document Set Scripts

It is known that the Group Name field has been used improperly and this will result in a bad user experience relating to document sets. There will be multiple scripts required:

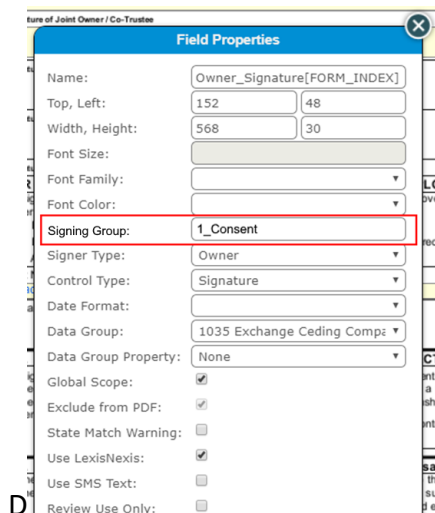
- Run evaluation script to identify Carriers/Distributors with Group Name used inappropriately. (done)
- Script will identify number and tagging of Group Name fields as implemented currently by client.
- Script must also identify
- Identify if the fields are tagged appropriately to drive document sets in signing ceremony
- If not, we will then need to communicate with the client to understand their desired document set functionality and coordinate efforts to clear/adjust correctly the document set/signing needs to satisfy their workflow.
- Part of the resolution may involve running scripts against the clients' environment to clear/modify Group Name fields. Manual changes may be necessary as well. TBD for each client.
- Script must also modify meta data for locked, in flight cases and adjust the fields appropriately

Acceptance Criteria

- Evaluation Script must allow us to identify if Group Name is specific to Signer role, or if the Group Name is properly structured to drive sequence or document sets in signing ceremony
- Resolution Script must adjust Group Name fields for all signature controls, even if the application is locked, to properly adjust the meta data to properly adjust the document set/signing ceremony workflow to satisfy the clients signing requirements.
- (Ability to deploy the newly updated forms to distribution)

3.2 Admin: Group Name/Signing Group

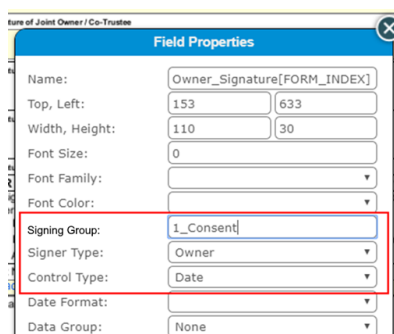
- Document Sets will behave the exact same way in Single and Multi-Sign scenarios



Field Properties

| | | |
|----------------------|-------------------------------------|----|
| Name: | Owner_Signature[FORM_INDEX] | |
| Top, Left: | 152 | 48 |
| Width, Height: | 568 | 30 |
| Font Size: | | |
| Font Family: | | |
| Font Color: | | |
| Signing Group: | 1_Consent | |
| Signer Type: | Owner | |
| Control Type: | Signature | |
| Date Format: | | |
| Data Group: | 1035 Exchange Ceding Comp | |
| Data Group Property: | None | |
| Global Scope: | <input checked="" type="checkbox"/> | |
| Exclude from PDF: | <input checked="" type="checkbox"/> | |
| State Match Warning: | <input type="checkbox"/> | |
| Use LexisNexis: | <input checked="" type="checkbox"/> | |
| Use SMS Text: | <input type="checkbox"/> | |
| Review Use Only: | <input type="checkbox"/> | |

- Ancillary signature fields with the control types of City, State, Date, and Initial, must have the same Signing Group name as the primary Signature. (If we have different group names for these controls, the system will create different document sets.)



Field Properties

| | | |
|----------------|-----------------------------|-----|
| Name: | Owner_Signature[FORM_INDEX] | |
| Top, Left: | 153 | 633 |
| Width, Height: | 110 | 30 |
| Font Size: | 0 | |
| Font Family: | | |
| Font Color: | | |
| Signing Group: | 1_Consent | |
| Signer Type: | Owner | |
| Control Type: | Date | |
| Date Format: | | |
| Data Group: | None | |

Acceptance Criteria

- Each different group name will drive a separate document set

- Document Sets will be presented in the alphanumeric order by Signing Group tag as follows Null, 1_Sample, 2_Sample, etc.
- Document sets are shown the same way for the document sets present whether it is in Single Sign or Multi-Sign scenarios
- (Ability to deploy the newly updated forms to distribution)

3.3 In flight orders – **more on this will be added when the code is delivered.**

- If a script was run for wiping out the group name, orders in edit application should not be impacted because the order is not locked down.
- If a script was run for wiping out the group name and we convert inflight orders, how will that impact the order? These orders are locked down so the group name was there when the signatures were generated and now after the release conversion the group name is gone.
- Internal table structures will be altered so how will that impact the inflight order.

Acceptance Criteria -