INSURANCE TECHNOLOGIES FireLight®

iConnect 170556 Design Approach

Project Overview

This project adds the ability for clients to attach a document during the Client Fill and Client Fill and Sign requests.

When a producer sends an email request for "Client Fill" and "Client Fill and Sign", the client needs the ability to attach documents. Today, FireLight does not support attachments during these workflows and the client has to send documents via email or another delivery method. The producer may not notice the documents sent separately before submitting and that causes a NIGO.

This project will add a menu option to the "Client Fill" and "Client Fill and Sign" top menu items. We will use our edit application template requirements to help ensure required uploads are completed.

Features/Requirements: Overview

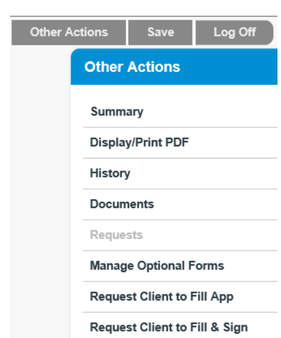
This project will add an Attach option to the top menu items in "Client Fill" and "Client Fill and Sign". This will leverage the existing FL functionality for uploading outside documentation including the upload dialog, buttons to quick launch an upload, template functionality including notification that a template is required, document type association with a template, signature tags on the template, and % complete if a template is defined required.

Features/Requirements: Admin

1. FireLight will use existing upload functionality such that uploads can be associated with a template to define requirement of the upload or an upload can also be stand alone with no association of a template.
2. FireLight will use the existing edit application to define…
   - When an upload is required using templates, rules, and package definitions
   - Document Tag association with the template
   - A Upload button
   - Template tagging to define who and where signatures are required in the uploaded template

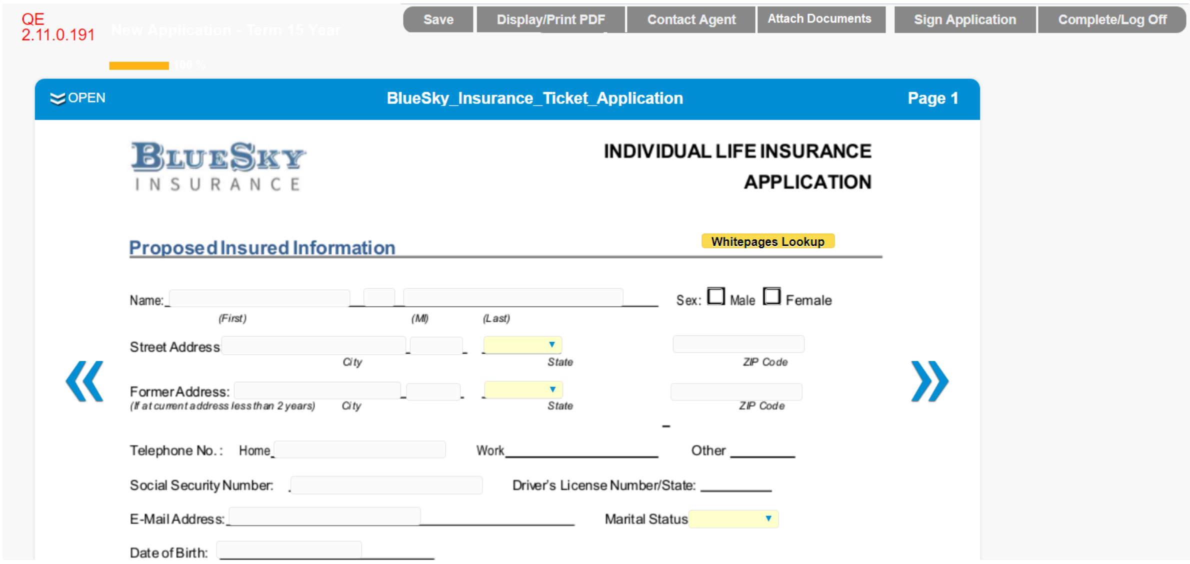
Sending Request "Client Fill and Sign" and "Client Fill"

3. Update "Client Fill and Sign" to allow a "Client Fill and Sign" request to be sent when there is a template requirement that is not met yet. (Today, the "Client Fill and Sign" request is not available if there is a template requirement. It is considered an agent requirement that must be met first before sending to the client.) With this project, we are not assigning who must complete the upload. We are allowing the upload to be completed by the client.

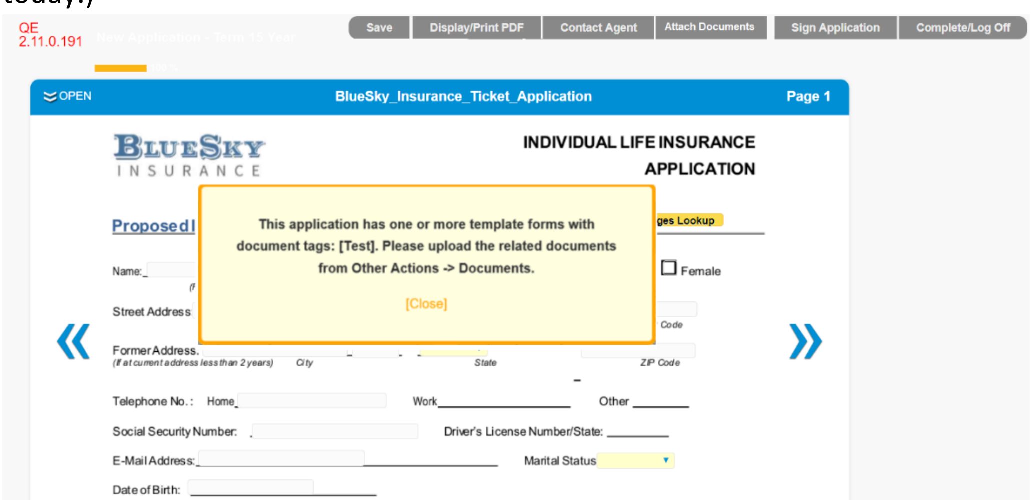


Edit Application Workflow

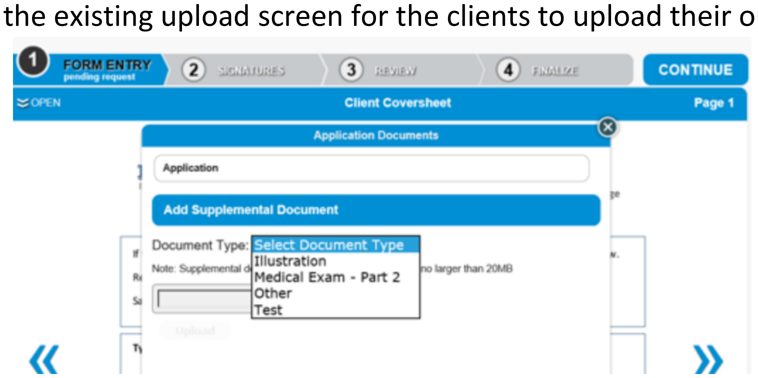
4. Add an Attach option to the top menu items in “Client Fill” and “Client Fill and Sign”



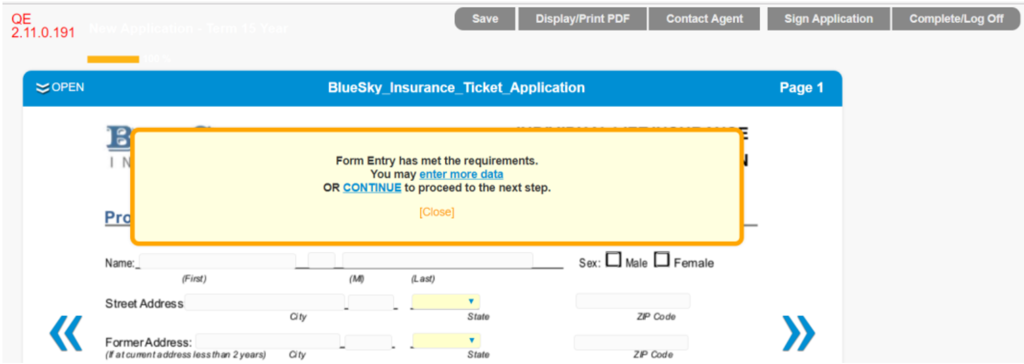
5. Reuse the existing template functionality to provide notifications to clients’ during their “Client Fill” and “Client Fill and Sign” request that they must upload a document. (Today, “Client Fill and Sign” cannot send with a required template so there is no support in these workflows today.)



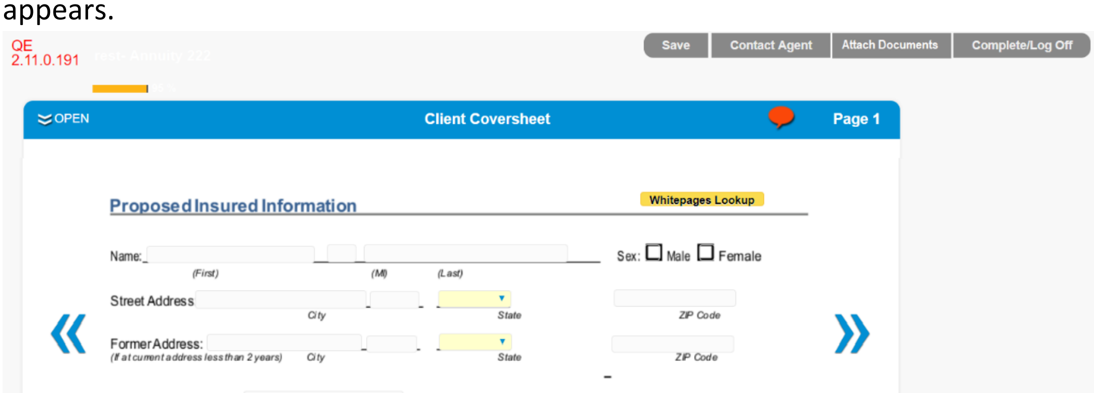
6. Reuse the existing upload screen for the clients to upload their outside documents.



7. Ensure % complete includes any template requirements. (See iConnect 170776)



8. If template has not been uploaded, the client will not have the Sign option. This will use the existing % complete functionality where the edit application must be 100% before the sign icon appears.



9. If template is not uploaded, the client can complete and logoff. The agent upon opening the Client Fill will need to complete the upload and then follow the normal client sign workflows.

Use Cases / Workflow Changes

Client must be able to attach outside documents during the "Client Fill" and "Client Fill and Sign" workflows.

- Client Fill and Sign with no defined templates
    - Client will have the attach option prior to completing the fill.
    - Once fill is complete, the client cannot attach documents anymore as we are not adding an attach option during signing.
- Client Fill and Sign with defined templates
    - Client will have the attach option prior to completing the fill.
    - Template will indicate a required form to be uploaded.
    - Client will use attach option to upload document with the correct document type.
    - Once document type is attached, % complete is updated
    - Client can continue and once fill is complete, the client cannot attach documents anymore as we are not adding an attach option during signing.
- Client Fill with no defined templates

- Client will have the attach option prior to completing the fill.
- Once fill is complete, the client cannot attach documents as the link to the fill request will be removed.

- Client Fill with defined templates
    - Client will have the attach option prior to completing the fill.
    - Template will indicate a required form to be uploaded.
    - Client will use attach option to upload document with the correct document type.
    - Once document type is attached, % complete is updated
    - Client can continue and once fill is complete, the client cannot attach documents as the link to the fill request will be removed.
- Client Fill with defined templates but client does not upload, agent will be required to upload as part of their edit application.
    - Client will have the attach option prior to completing the fill.
    - Template will indicate a required form to be uploaded.
    - If document type is NOT attached to complete the requirement, the % complete will not reach 100%.
    - Client can continue to fill and submit the application with the pending upload. The agent will complete the upload.
- Client Fill and Sign with defined templates but client does not upload, client will not get the Sign Application button. The agent will be required to upload as part of their edit application.
    - Client will have the attach option prior to completing the fill.
    - Template will indicate a required form to be uploaded.
    - If document type is not attached to complete the requirement, then % complete will not reach 100%.
    - Client can continue to fill but will not have the sign icon until the template is uploaded. The client can submit the application with the pending upload but cannot complete the sign. The agent will complete the upload.

Admin Changes

None

App Changes

See above

Integration Changes

None

UI Mock Ups

Included above

How to Enable and Use This Feature

See help guide for Client Fill and Client Fill and Sign features.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		Templates
- Design Forms		Templates and rules
- Profile Administration		
- Reports		
- Deployment		
FireLight App		
- New Application	Yes	“Client Fill” and “Client Fill and Sign”
- Edit Application	Yes	Edit application during “Client Fill” and “Client Fill and Sign”
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		

- Commission Netting		
- Activity Reporting		

