iConnect Design Approach - Clear Provider, Base, and Rule Scope data when copy with changes is used

Project Overview

When a Copy with Changes takes place:

1. Remove any user entered data items that are not referenced on the destination user documents (that are editable fields) included on the new product. We have this in place today. (This would ignore labels, disabled flags, signatures, etc.)

2. Remove all base data items FLI_ data items for the new application.

3. Remove any data items created through the provider (e.g. Provider scoped).

Basically, we will clear everything away except items identified in step 1 and 1a above, leaving user data only and removing Base, Provider, Mapping, Rule and Unknown scoped data.

Doing the above will clear the old product codes, old cusip, old carrier codes, old provider data, and old rule scope data. The user entered data and prefilled values from the 103 will be retained.

Currently, when a distributor uses "copy with changes" they are allowed to copy another carrier's product. When this happens, AppSub codes from the case copied from the other carrier can remain in the file. With this project this will eliminate this concern. When "copy with changes" occurs, the base system will clear the case of any base, provider, and rule scope data related to the prior carrier but retain the User Date. This will prevent product data from being retained and potentially being transmitted in the AppSub file. This update will remove any potential that PII that could be passed to another carrier.

Clear Provider Impacts:

Copy with Changes

AppSub files when Copy with Changes is use

Requirements / User Stories

Clear Base related items with Copy with Changes

Currently in Firelight, Base related items are not clearing entirely. We need to expand this clearing method to remove anything that is listed in the Base category. This will include FLI_ items and some items that are not prefixed with the FLI_. An example of not prefix FLI_ would be Needs Determination.

Currently, when a distributor uses "copy with changes" they are allowed to copy another carrier's product. When this happens, AppSub codes from the case copied from the other carrier can remain in the file. With this project this will eliminate this concern. When "copy with changes" occurs, the base system will clear the case of any base scope data related to the prior carrier to prevent data from being retained and potentially being transmitted in the AppSub file. This update will remove any potential that PII that could be passed to another carrier.

Acceptance Criteria

- When selecting Copy with Changes, any base values from the previous app will be cleared which will include FLI_ items that are not prefixed with FLI (Needs determination filter) will be cleared for the new copied activity.

Clear Rules when copy with changes is used

Currently in Firelight, Rules scope data from the previous app is not clearing when copy with changes is used. Rule scope data is defined as any data item that is created from a backend value (example to drive a combo box). We want to eliminate any data items from coming over in the copy with changes that could impact the App/Sub. We need to clear all previous activity Rule scope data when copy with changes is used. We need to ensure this occurs with both Distributor and Carrier rules scope data. Once the copy and clear occurs, then FL will apply the user data and run the rules associated with the new app.

Currently, when a distributor uses "copy with changes" they are allowed to copy another carrier's product. When this happens, AppSub codes from the case copied from the other carrier can remain in the file. With this project this will eliminate this concern. When "copy with changes" occurs, the base system will clear the case of any rule scope data related to the prior carrier and distributor to prevent the old data from being retained and potentially being transmitted in the AppSub file. This update will remove any potential that PII that could be passed to another carrier.

Acceptance Criteria

- Clear current Carrier and Distributor Rules scope data when copy with changes is used.
- Apply user data and run the new activity rules for both Carrier and Distributor

Clear Provider related items

Currently the Provider data items (provider data scope) is not clearing in FireLight when copy with changes is initiated. With this project, All Provider dataitems should be cleared when copy with changes is initiated. Provider data is not distinguished for carrier and distributor. Provider data will need to clear for both carrier and distributor. Once the user data is applied, the new provider will run. The clear provider with "copy with changes" will apply to both Copy with Changes across carrier & Copy with Changes in the same carrier.

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Acceptance Criteria

- Clear the original activity provider data (both carrier and distributor) when copy with changes is initiated.
- Once the user data is applied, allow the new provider to run.
- Validate that the provider data is cleared for Copy with Changes across carrier & Copy with Changes in the same carrier.

Clear Provider when copy with changes is used

Currently, when a distributor uses "copy with changes" they are allowed to copy another carrier's product. When this happens, AppSub codes from the case copied from the other carrier can remain in the file.

When "copy with changes" occurs, the base system will clear the case of any data related to the prior carrier to prevent data from being retained and potentially being transmitted in the AppSub file. This update will remove any potential that PII that could be passed to another carrier.

Acceptance Criteria

- 1. The provider details are cleared when "copy with changes" is used.
- 2. The AppSub codes are not in the new copied app. (dev will have to test)