INSURANCE
TECHNOLOGIES

LexisNexis Enhancements

FIRELIGHT BASE

FireLight®

Platform

Insurance Technologies, LLC

Insurance Technologies, LLC
Two South Cascade Avenue
Colorado Springs, CO 80903
USA
Phone: 719.442.6400
FAX: 719.442.0600

Internet E-Mail: info@insurancetechnologies.com
Website: http://www.insurancetechnologies.com

Table of Contents

iConnect 239187 Design Approach - LexisNexis Enhancements

Project Overview

This Enhancement allows the ability to recognize and save any data that is associated to the LexisNexis custom action calls - including both the Instant ID and Risk Classifier services. This gives the user the ability to have data automatically save once a custom action button is selected associated with LexisNexis services, as well as prevent the application from being deleted. These services give the requesting organization the ability to retrieve this information up until the application purge, especially if this data wasn't submitted to their back office. This enhancement will only affect users of the LexisNexis Instant ID and Risk Classifier Solution functionality.

Impacts:
•Custom Action, specifically Action Type "LexisNexis" - when this button is clicked, the data already entered will be retained and the application will no longer be able to be deleted
•Delete Button within All Activities - this button will be disabled, with a tool tip explaining the reasoning when hovered over
•Save - The application will automatically save once the Custom action button for LexisNexis is clicked. The application will still ask the user if they want to save if they exit prematurely from submitting the application. This was left to still give the user the ability to save, however, if they select "no" the information will still save per the custom action button

1 When "LexisNexis" custom action is set within an activity, the activity is unable to be deleted

When a custom action type of "LexisNexis" is set within an activity, and is clicked, then the activity itself will not be able to be deleted from the All Activities or Recent Activity table.

The user will still be able to see the delete button within the All Activities page, but it will be disabled. When the user hovers over the delete button, it will show a tool tip stating, "The activity cannot be deleted after selecting the Custom Action Button associated with LexisNexis"

Acceptance Criteria

- When "LexisNexis" is set within a Custom Action Type, and is clicked, it will remove the ability to delete the activity associated to it, and disable the delete button within the All Activities page.

- The activity can be deleted prior to the Custom Action Type button being clicked. The Delete button will be enabled at this point.
- When the delete button has been disabled, a tool tip will show if the user hovers over the button stating "The Activity cannot be deleted after selecting the Custom Action Button associated with LexisNexis"
- This enhancement will apply to LexisNexis InstantID, and Risk Classifier, in which the custom action button is used to initiate service.

2 Ability to automatically save data from a custom action button click

When a custom action type is set to "LexisNexis", and is clicked, then any data that is entered on the application will be automatically saved. This will include any data group and data group properties that are populated (i.e. Owner First Name, Owner Last Name, etc.)

For LexisNexis specifically, the following dataitems will be required, so should be saved if already filled out:

Party First Name

Party Last Name

Party Street Address

Party City

Party State

Party Zip

Party DOB

Party SSN

Party Phone Number

Party Policy State of Issuance

Party Policy Face Amount

Party Gender

Party Driver License State

Party Driver License Number (this field is optional, but could be filled out)

Acceptance Criteria

- When a custom action button is clicked, any data that is filled into the dataitems will be automatically saved. This could include, Party First Name, Last Name, Street Address, City, State, Zip, DOB, SSN, Phone Number, Policy State of Issuance, Policy Face Amount, Gender, Driver License State, and Driver License Number.
- The save of data could include all other fields that are prefilled but not specifically mentioned here.
- This enhancement applies to both InstantID and Risk Classifier, that use the custom action button to initiate service.

Page 6 of 6