INSURANCE TECHNOLOGIES

Allow Configurable Attempts for "State Signing Error"

FIRELIGHT BASE

FireLight®

Platform

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iConnect 259565 Design Approach – Allow Configurable/Unlimited Attempts for "State Signing Error"

Project Overview

Currently, there is a set limitation of 5 attempts when a user selects an incorrect/mismatched state during the E-sign ceremony with the "State Signing Error" selection made on the signature control. After the 5th attempt with a state mismatch, the application is locked and cannot be submitted. This enhancement will allow clients to configure the number of attempts to display an alert for state mismatch at the time of signing ceremony. Using this setting, clients can also set the number of attempts to be unlimited. Removing the limitation for the number of attempts will allow signers to select a mismatching signing state any number of times. This will allow the alert dialog to display to the user after each invalid state selection but will not lock the application and prevent submission.

This change will impact all clients using the setting "State Signing Error" on the signature control of their form.

Impact:
- Admin Tool: New org setting "State Signing Error Attempts" on Organization Config -> Organization Settings -> Signature (tab).
- E-Sign ceremony: State signing mismatch on signature capture screen.
- This change will also impact the embedded APIs used for SSO/IXN.

1 Org setting for state signing error attempts
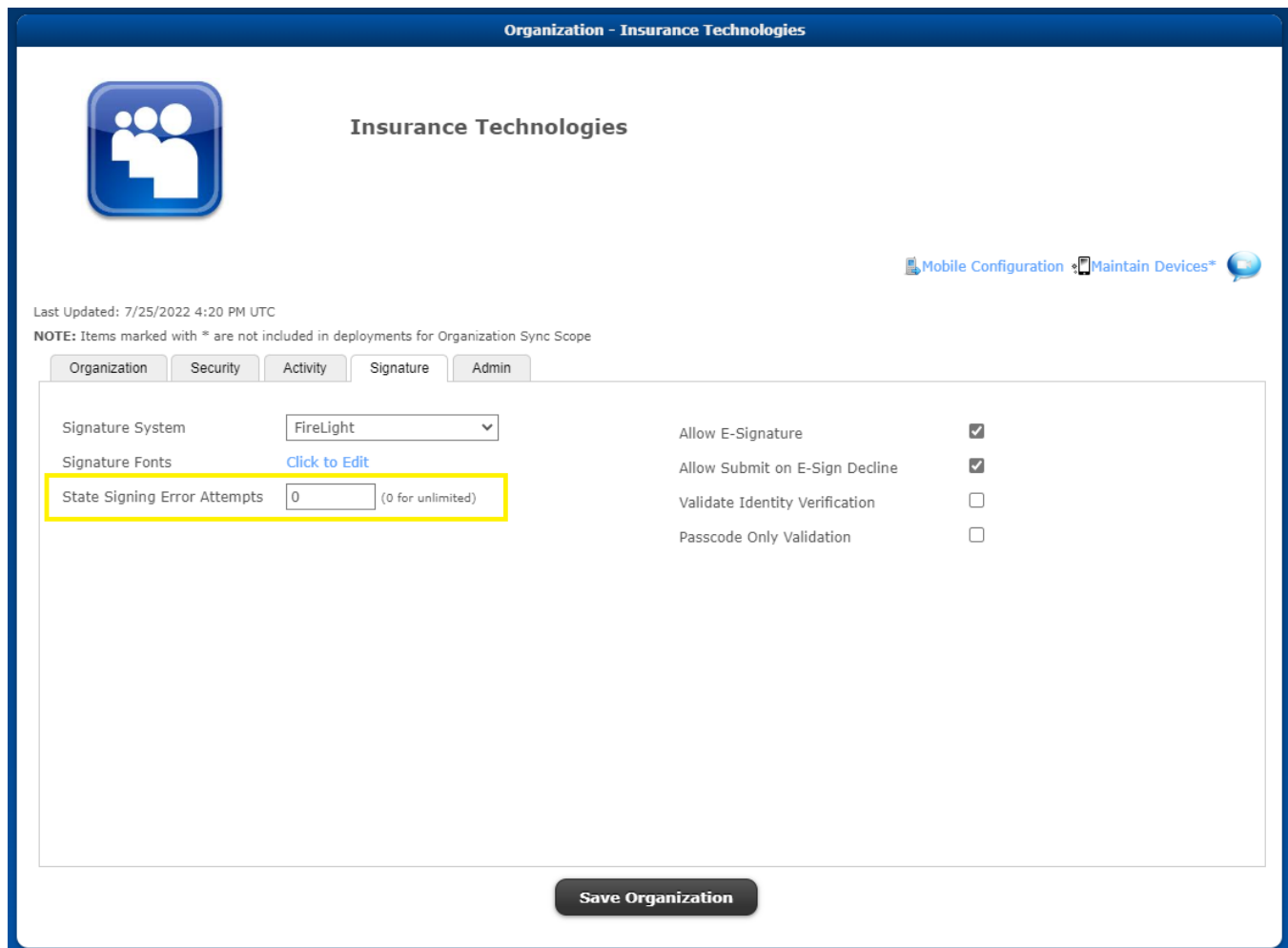
An organization level setting "State Signing Error Attempts" will be added on Signature tab (under Organizations) to allow clients to enter the desired number of times the state signing error will show on the signature capture screen. The number of attempts will be saved at the organization level and based on the number saved, FireLight will allow/display the warning message. Default value for this setting will be "0", which means unlimited attempts.

If the client would like to display the error message unlimited times to the user, they will update the value as "0". This will display the error message each time a mismatching signing state is selected.

Since it will be unlimited number of times, it will not lock the application for submission but continue to display the error message.

If the user wants to limit the number of attempts for the mismatch signing state, they will update the value to a natural number. FireLight will display a warning at each attempt up to the limit set by the organization and lock the application at the last attempt, preventing submission.

Below is a mockup of the new setting "State Signing Error Attempts" to be placed on screen FL Admin -> Organization Config -> Organization Settings -> Signature (tab).

Acceptance Criteria

- New setting "State Signing Error Attempts" is added on the screen "Organization Config -> Organization Settings -> Signature (tab)" in admin tool.
- Any natural number can be entered for the new setting.
- The new setting allows entering "0" to set the limits as unlimited.
- The new setting allows leaving it as blank and then it treats the value as "0".
- Default value for the org setting is "0".

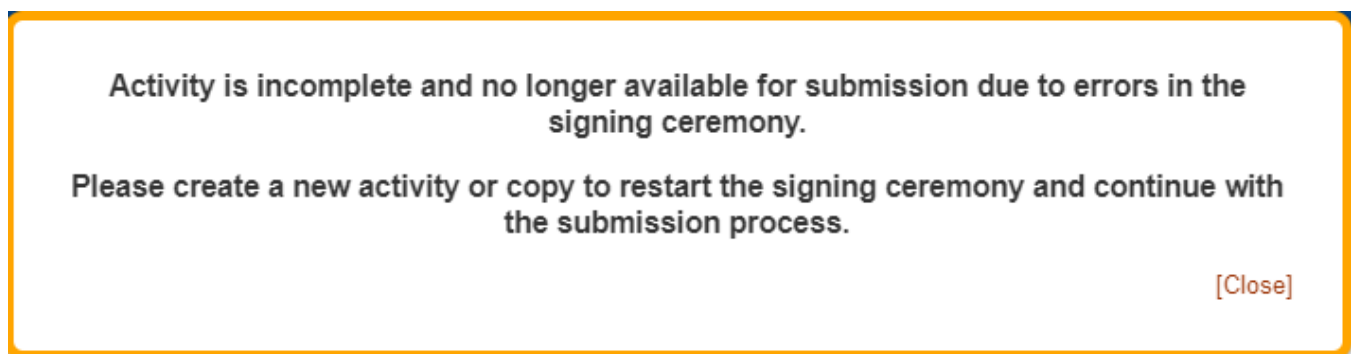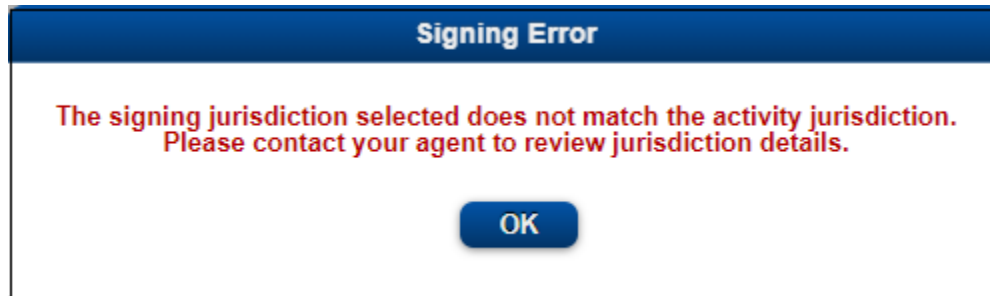# 2 Allow unlimited attempts for mismatched state while signing

Currently there is a limitation of 5 attempts when a user selects an incorrect/mismatched state while in the E-sign ceremony when using the setting "State Signing Error" on the signature control. This limitation will be removed to allow the check/alert to appear at unlimited attempts. This will prevent the application from locking after 5 attempts and display the state mismatch error innumerable times when the signing state does not match the jurisdiction state.

Clients will be given the ability to set the number of times the state signing mismatch warning is displayed to the user on the signature capture screen. As per the number set under the org setting "State Signing Error Attempts" along with the State Signing Error setting selected for the signature control, the state signing error will display and after the last attempt the application will lock in submission. The default attempts are set to "0", which means the attempts will be unlimited for state signing error. Making the attempts "0" will not lock the application for submission and will trigger the state signing error every time a mismatched state is selected. Clients can update this value to any natural number if they would like to limit the number of times an incorrect state is selected at the signing ceremony and lock the application for submission at the last attempt.

For example, if the number of attempts is set to 5, an alert will display on the signature capture screen if the client selects a signing state that does not match the application jurisdiction 4 times.

Signing Error

The jurisdiction in which you are signing must match the activity jurisdiction.

OK

If the user selects a mismatching state on the 5th attempt, an alert will display and the application will lock, preventing submission.

Signing Error

The signing jurisdiction selected does not match the activity jurisdiction.
Please contact your agent to review jurisdiction details.

OK

Activity is incomplete and no longer available for submission due to errors in the signing ceremony.

Please create a new activity or copy to restart the signing ceremony and continue with the submission process.

[Close]

This change will be applied to all clients using "State Signing Error" on the signature control in the Forms Designer.

Acceptance Criteria

- When the state signing mismatch limit is set to 5, activity is locked after the 5th attempt of mismatched signing state.
- When the state signing mismatch limit is set to 0, activity is not locked after the 5th attempt of mismatched signing state.
- When the state signing mismatch limit is set to 0, signing mismatch error shows at the nth attempt of selecting an incorrect signing state.
- When the state signing mismatch limit is set to 0, after the nth attempt of mismatched signing state, activity is not locked in submission.
- Org Setting "State Signing Error Attempts" can be set to any numeric value.
- Embedded APIs using SSO/IXN also display the state mismatch error at the time of signing ceremony.
- State signing mismatch error appears only when setting "State Signing Error" is enabled on signer's signature control for that application.