Outbound Processing-Include PDFs
FIRELIGHT BASE

FireLight®

Platform

OUTBOUND PROCESSING-INCLUDE PDFS
Document Version: 1.0
Published: November 05, 2020

INSURANCETECHNOLOGIES.COM

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 227461 Design Approach - Outbound Processing-Include PDFs

Project Overview

Currently, Base functionality does not allow for retrieval of PDF documents unless the activity is locked. Clients desire the ability to receive PDFs of documents not locked down for signing prior to purge. Base functionality will be enhanced to leverage the data query service to expose Print PDF in the provider for activities prior to signing, prior to purge, providing access to documents when the activity is not locked.

Impacts:

eApp, Presale-PDF of documents for unlocked activities can be sent prior to purge

Outbound Integration-Uses the ApplicationSchedule to handle retry logic – uses unique keys to avoid table collisions, however. The ApplicationSchedule table is used mostly (if not completely) by Providers for various reasons. A unique key should guarantee no impact, however.

Purge process (scheduler)-Processing to accomplish Provider call for incomplete apps per organization, and to accomplish a single retry as necessary

1 Include PDFs in Outbound Processing Prior to Purge

Abandoned transmissions such as in process applications, needs determination transactions, etc. will have the ability to be returned in a PDF format in addition to the XML name/value pair file in the outbound payload. The existing scheduler will be used to send the transmission prior to purge. Base functionality will be enhanced to leverage the data query service to expose Print PDF in the provider for activities prior to signing, providing access to documents when the activity is not locked. If the call to the provider fails, or there are exceptions, the purge will be delayed and one more attempt made. If the second attempt fails, the activities will be purged, and no additional attempts made.

Acceptance Criteria

- Existing scheduler is used to send transmission of PDF for activities prior to signing (ie: In process applications, Needs Determination, etc.).

- Base system provides a method for the provider to get access to documents, even if they are not locked.
- PDF documents prior to signing are included in addition to the XML name/value pair file in the outbound payload.
- Existing scheduler is used to send the transmission prior to purge.

2 How to Implement

To implement PDFs for incomplete activities prior to purge, clients should contact their Project Manager. Insurance Technologies resources may reference technical information in the developer document, "Pre-Purge Provider Hook for Incomplete Apps".