

# iConnect 115072 Design Approach

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Issue #115072 - Allow bulk send to a reviewer (Step 3 / manual review step) in bulk processing.

## Workflow Changes

There will be no changes to the normal workflow of how the existing manual review process works within FireLight. New functionality will be added to system to support the review of multiple applications that come in through multi-life.

## Features/Requirements

In our current system, after completing the signature process the user needs to send a review request to a reviewer. However, the user can only send a review request for the current application on which he is currently working. Currently there is no option in FireLight to send multiple applications for review to the reviewer. We need to provide a way for the user to make a review request for a batch of applications that were created through multi-life.

## Admin Changes

This functionality requires no changes in Admin.

## App Changes

To implement this feature, we need make change in multi-life application module as well as reviewer module.

### Multi-Life Application Module

1. On the “Multi-Life Application” view, a new option “Send Review Request” will be added to Request drop-down.
2. After selecting the “Send Review Request” option from the request drop-down, applications that qualify for review process will be shown.
3. When the “Send Review Request” option is selected from the request drop-down, “Signer Type”, “Agent Name” and “Agent Email” fields will be hidden. A “Next” button will be shown instead of “Send”.
4. User can select one or more application(s) from the list and proceed further by clicking “Next” button.
5. After clicking the “Next” button, a page just like the “Send Email To Reviewer(s)” will be shown.
6. Using “Send Email To Reviewer(s)” page, user can send single request for all selected applications. A link and passcode will be sent to reviewer’s mailbox.

### Reviewer Module

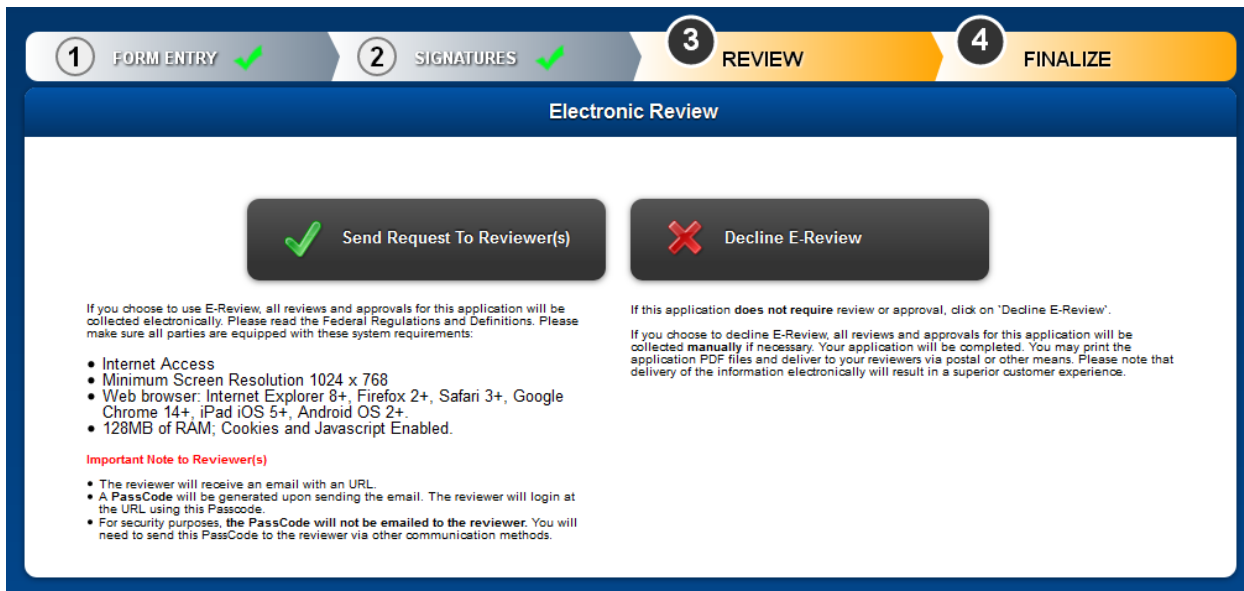
1. Reviewer will use the passcode to enter in the system.
2. A new page will be created that will list all the applications received for review. Each application section will have buttons for view, approve, reject and email. The application’s current status (Rejected/Pending) will also be displayed in each application section.
3. When Reviewer will approve an application, it will not submitted directly to back office but go in Pending state.

4. All these pending applications will be submitted to back office by clicking “Finalize” button.
5. Reviewer can also upload a document with batch like manual review.
6. The reviewer can view all pages in an application by clicking view button in application section.
7. We will update the review status (Pending/Rejected) on application list page for each application so the user can see a summary of applications in the request.
8. This page also list the “Federal Regulations and Definitions”.

## UI Mock Ups

### Existing flow

In the current system, the review process starts after the signature process is completed for each individual application.



The mockup shows a four-step process bar at the top: 1 FORM ENTRY (green checkmark), 2 SIGNATURES (green checkmark), 3 REVIEW (orange highlight), and 4 FINALIZE (orange highlight). Below the bar is a section titled "Electronic Review". It contains two main buttons: "Send Request To Reviewer(s)" with a green checkmark icon, and "Decline E-Review" with a red X icon. Below these buttons are two columns of text. The left column explains the E-Review process and lists system requirements. The right column explains the manual review process if E-Review is declined. Below the requirements is an "Important Note to Reviewer(s)" section.

**1 FORM ENTRY** ✓ **2 SIGNATURES** ✓ **3 REVIEW** **4 FINALIZE**

**Electronic Review**

**✓ Send Request To Reviewer(s)** **✗ Decline E-Review**

If you choose to use E-Review, all reviews and approvals for this application will be collected electronically. Please read the Federal Regulations and Definitions. Please make sure all parties are equipped with these system requirements:

- Internet Access
- Minimum Screen Resolution 1024 x 768
- Web browser: Internet Explorer 8+, Firefox 2+, Safari 3+, Google Chrome 14+, iPad iOS 5+, Android OS 2+.
- 128MB of RAM; Cookies and Javascript Enabled.

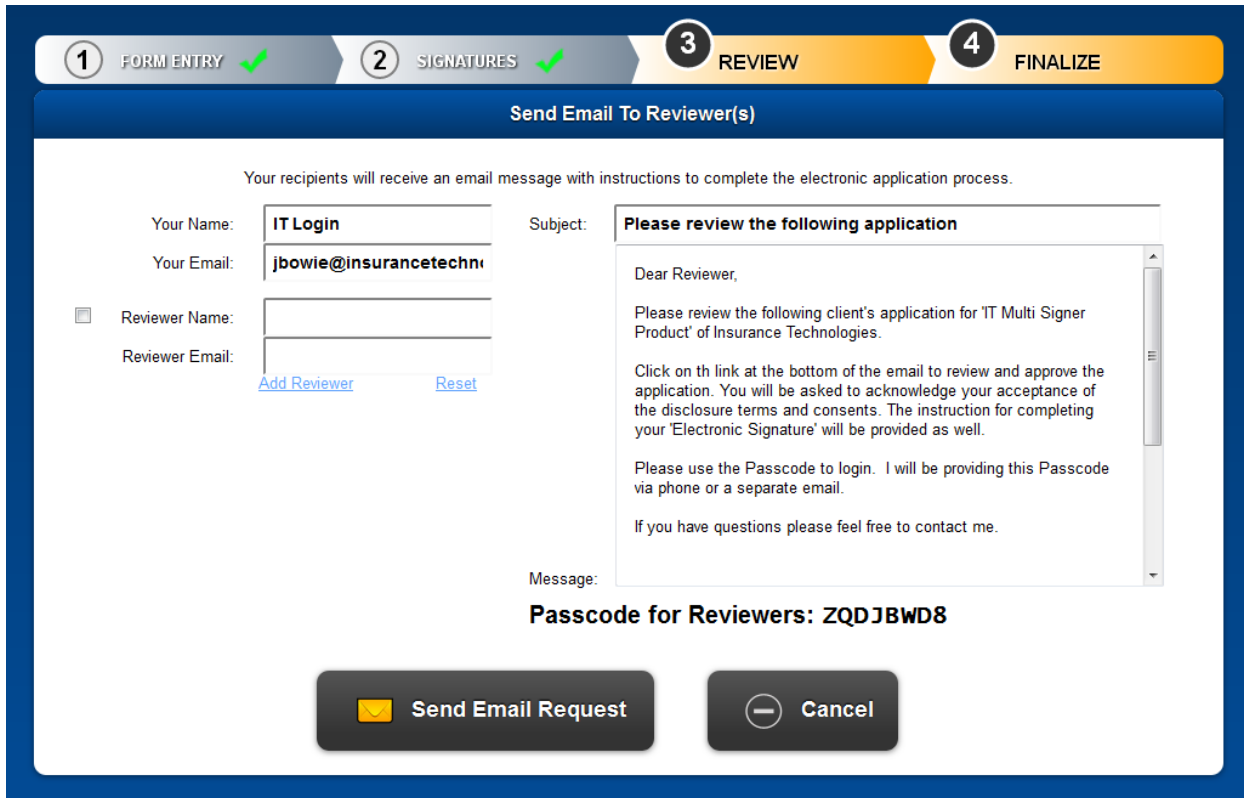
**Important Note to Reviewer(s)**

- The reviewer will receive an email with an URL.
- A PassCode will be generated upon sending the email. The reviewer will login at the URL using this Passcode.
- For security purposes, the PassCode will not be emailed to the reviewer. You will need to send this PassCode to the reviewer via other communication methods.

If this application does not require review or approval, click on 'Decline E-Review'.

If you choose to decline E-Review, all reviews and approvals for this application will be collected manually if necessary. Your application will be completed. You may print the application PDF files and deliver to your reviewers via postal or other means. Please note that delivery of the information electronically will result in a superior customer experience.

Using “Send Email To Reviewer(s)” page, user can send review request to reviewer.



**1** FORM ENTRY ✓ **2** SIGNATURES ✓ **3** REVIEW **4** FINALIZE

### Send Email To Reviewer(s)

Your recipients will receive an email message with instructions to complete the electronic application process.

Your Name:  Subject:

Your Email:



☐ Reviewer Name:

Reviewer Email:

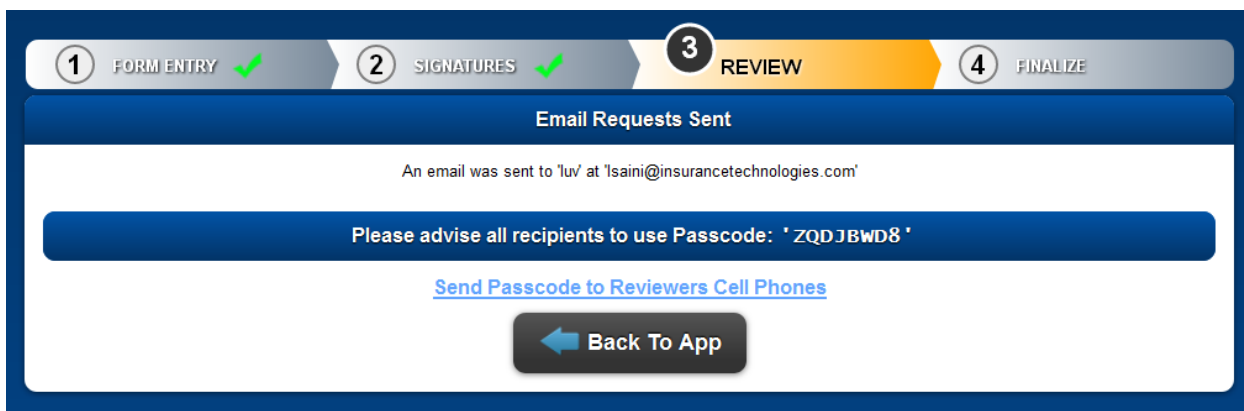
[Add Reviewer](#) [Reset](#)

Message:

**Passcode for Reviewers: ZQDJBWD8**

 **Send Email Request**  **Cancel**

Confirmation screen after sending review request.




**1** FORM ENTRY ✓ **2** SIGNATURES ✓ **3** REVIEW **4** FINALIZE

### Email Requests Sent

An email was sent to 'luv' at 'lsaini@insurancetechnologies.com'

**Please advise all recipients to use Passcode: 'ZQDJBWD8'**

[Send Passcode to Reviewers Cell Phones](#)

 **Back To App**

Reviewer login using passcode

Welcome

Passcode:

Enter


[Questions and Support](#)


Reviewer home screen after login. With this home screen the reviewer can view, approve or reject application


Approve Application 'New Application - IT Multi Signer Product'

Federal Regulations and Definitions

[ELECTRONIC SIGNATURES IN GLOBAL AND NATIONAL COMMERCE ACT \(ESIGN\)](#)  
[UNIFORM ELECTRONIC TRANSACTIONS ACT \(UETA\)](#)  
[Implementation of the Government Paperwork Elimination Act](#)  
[Digital Signature and Electronic Authentication Law \(SEAL\)](#)

 **View Application**

 **Approve Application**

 **Email Agent**

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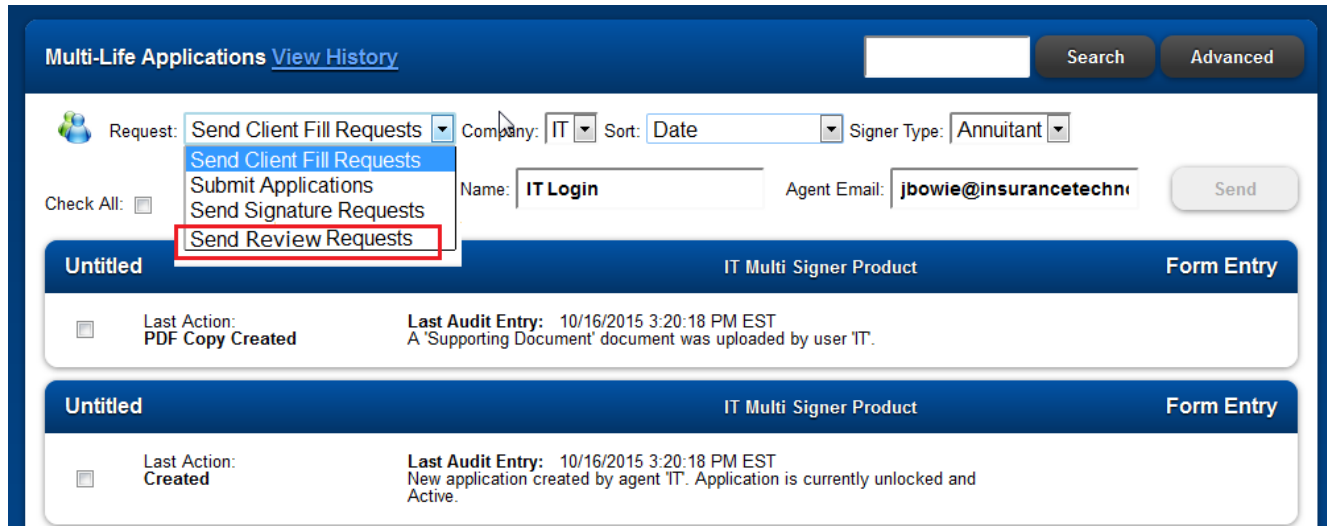
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## Proposed flow

In the proposed flow, there is no change to the existing flow for the manual review process for an individual application. In the proposed flow, new functionality will be added to the system so batch processing for review can be supported.

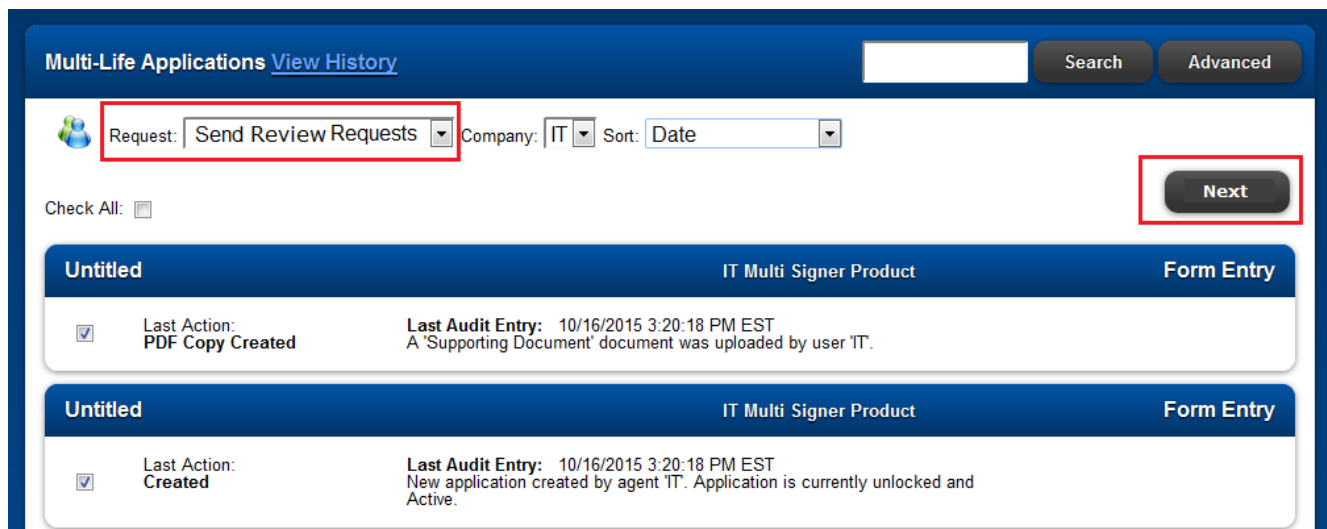
### Proposed flow in case of multi-life application -

Add a new option “Send Review Requests” in Request drop-down.



The screenshot shows the 'Multi-Life Applications' interface. At the top, there is a header bar with 'Multi-Life Applications' and a 'View History' link. Below this, there is a search bar and buttons for 'Search' and 'Advanced'. The main area contains a 'Request' dropdown menu with options: 'Send Client Fill Requests', 'Send Client Fill Requests', 'Submit Applications', 'Send Signature Requests', and 'Send Review Requests' (highlighted with a red box). Other fields include 'Company' (IT), 'Sort' (Date), 'Signer Type' (Annuitant), 'Name' (IT Login), and 'Agent Email' (jbowie@insurancetechni). A 'Send' button is visible. Below the form, there are two application entries, each with a 'Last Action' and 'Last Audit Entry'.

When “Send Review Requests” option selected from Request drop-down, we will hide “Signer Type”, “Agent Name” and “Agent Email” fields. We will show a “Next” button instead of the “Send” button.



The screenshot shows the 'Multi-Life Applications' interface after selecting 'Send Review Requests'. The 'Request' dropdown is highlighted with a red box. The 'Signer Type', 'Agent Name', and 'Agent Email' fields are hidden. A 'Next' button is visible in the top right corner, highlighted with a red box. The application entries below remain the same.

Clicking the “Next” button will show the “Send Email To Reviewer(s)” page/dialog. User can send a review request for all selected applications by clicking “Send Email Request” button. Clicking “Cancel” button will redirect user to previous screen.

Send Email To Reviewer(s)

Your recipients will receive an email message with instructions to complete the electronic application process.

Your Name:

Your Email:

☐ Reviewer Name:

Reviewer Email:

[Add Reviewer](#)
[Reset](#)

Subject: **Please review the following application**

Dear Reviewer,

Please review the following client's application for 'IT Multi Signer Product' of Insurance Technologies.

Click on the link at the bottom of the email to review and approve the application. You will be asked to acknowledge your acceptance of the disclosure terms and consents. The instruction for completing your 'Electronic Signature' will be provided as well.

Please use the Passcode to login. I will be providing this Passcode via phone or a separate email.

If you have questions please feel free to contact me.

Message:

Passcode for Reviewers: ZQDJBWD8

**Send Email Request**

**Cancel**

We will show a confirmation screen to user after sending the email request.

Email Requests Sent

An email was sent to 'luv' at 'lsaini@insurancetechnologies.com'

Please advise all recipients to use Passcode: 'ZQDJBWD8'

[Send Passcode to Reviewers Cell Phones](#)

**Back To List**

## Reviewer login screen

Welcome

Passcode:

Enter

[Questions and Support](#)

After entering into system, a new page listing all the applications will be displayed. Reviewer can view, approve, reject and send email to agent directly from this view by clicking respective buttons. Review status (Rejected/Pending) and product name will also be shown with each application section. Using “Upload Document” button, Reviewer can upload a document for the batch. “Finalize” button will submit all pending applications to back office. This page will also list “Federal Regulations and Definitions” block.

Review Applications

Application 1

Pending

Product 1

View

Approve

Reject

Email Agent

Application 2

Rejected

Product 2

View

Approve

Reject

Email Agent

Application 3

Pending

Product 3

View

Approve

Reject

Email Agent

Federal Regulations and Definitions

[ELECTRONIC SIGNATURES IN GLOBAL AND NATIONAL COMMERCE ACT \(ESIGN\)](#)

[UNIFORM ELECTRONIC TRANSACTIONS ACT \(UETA\)](#)

[Implementation of the Government Paperwork Elimination Act](#)

[Digital Signature and Electronic Authentication Law \(SEAL\)](#)

Finalize

Upload Document

## Areas Impacted

System Area	Yes	Comment
<b>Admin Tool</b>		
- <b>Form Library</b>		
- <b>Design Forms</b>		
- <b>Profile Administration</b>		
- <b>Reports</b>		
- <b>Deployment</b>		
<b>FireLight App</b>		
- <b>New Application</b>		
- <b>Edit Application</b>		
- <b>Signature Process</b>		
- <b>Review Queue</b>		
- <b>Manual Review</b>		
- <b>User Preferences</b>		
- <b>Inbound Integration</b>		
- <b>Outbound Integration</b>		
- <b>PDF Generation</b>		
- <b>Multi-life Application</b>	X	We will modify multi-life application view to accommodate new option "Send Review Request".
- <b>Reviewer Process</b>	X	After reviewer logon, A new page with selected application will be shown with view, approve, reject options. After approve application will go in "Pending" state. All pending applications will be submitted by clicking "Finalize" button.
<b>FireLight Console</b>		

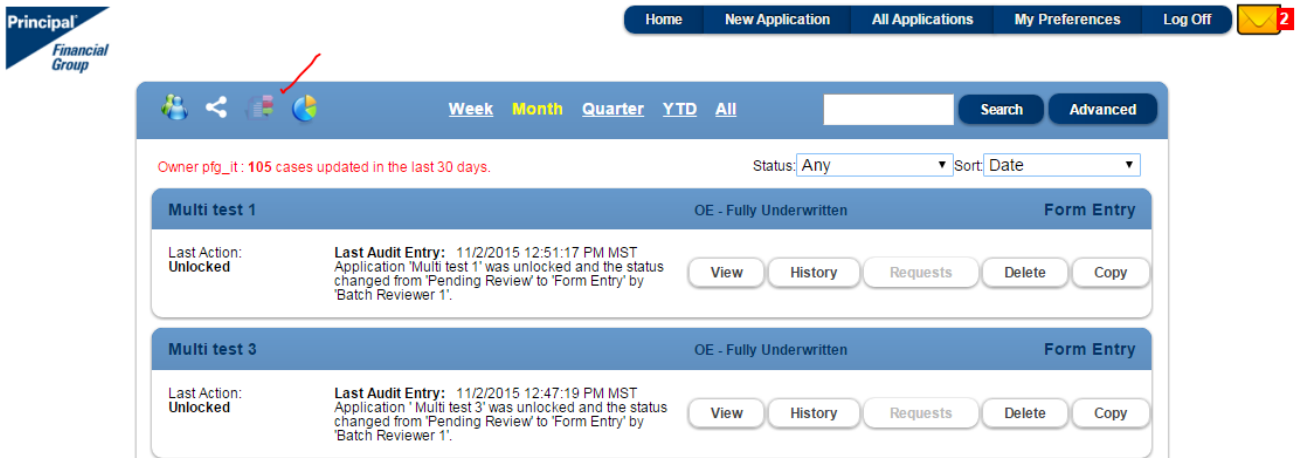


- Windows O/S		
- iOS		
- Android		
-		
<b>Other Systems</b>		
- DTCC Integration		
- Commission netting		
- Activity Reporting		

## Actual Implementation (11/2/2005)

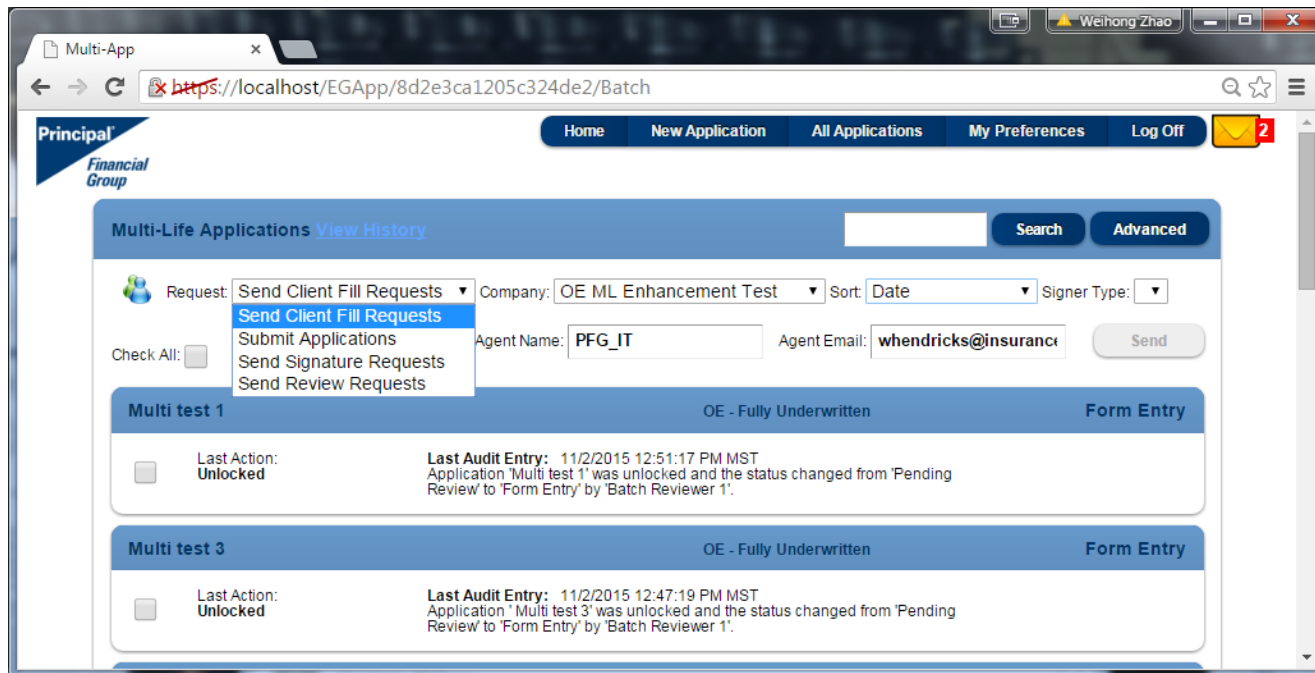
### Agent – send Multi-Life batch review request:

- Agent clicks on “Multi Life” icon.



The screenshot shows the Principal Financial Group application interface. At the top, there is a navigation bar with links: Home, New Application, All Applications, My Preferences, and Log Off. A notification icon with the number 2 is visible. Below the navigation bar, there is a search bar and a filter bar with options: Week, Month, Quarter, YTD, All. The main content area displays a list of Multi-Life batch review requests. The first request is for 'Multi test 1' with status 'OE - Fully Underwritten' and 'Form Entry'. The last action is 'Unlocked' and the last audit entry is dated 11/2/2015 12:51:17 PM MST. The second request is for 'Multi test 3' with status 'OE - Fully Underwritten' and 'Form Entry'. The last action is 'Unlocked' and the last audit entry is dated 11/2/2015 12:47:19 PM MST. Both requests have buttons for View, History, Requests, Delete, and Copy.

## ■ Select “Send Review Requests”

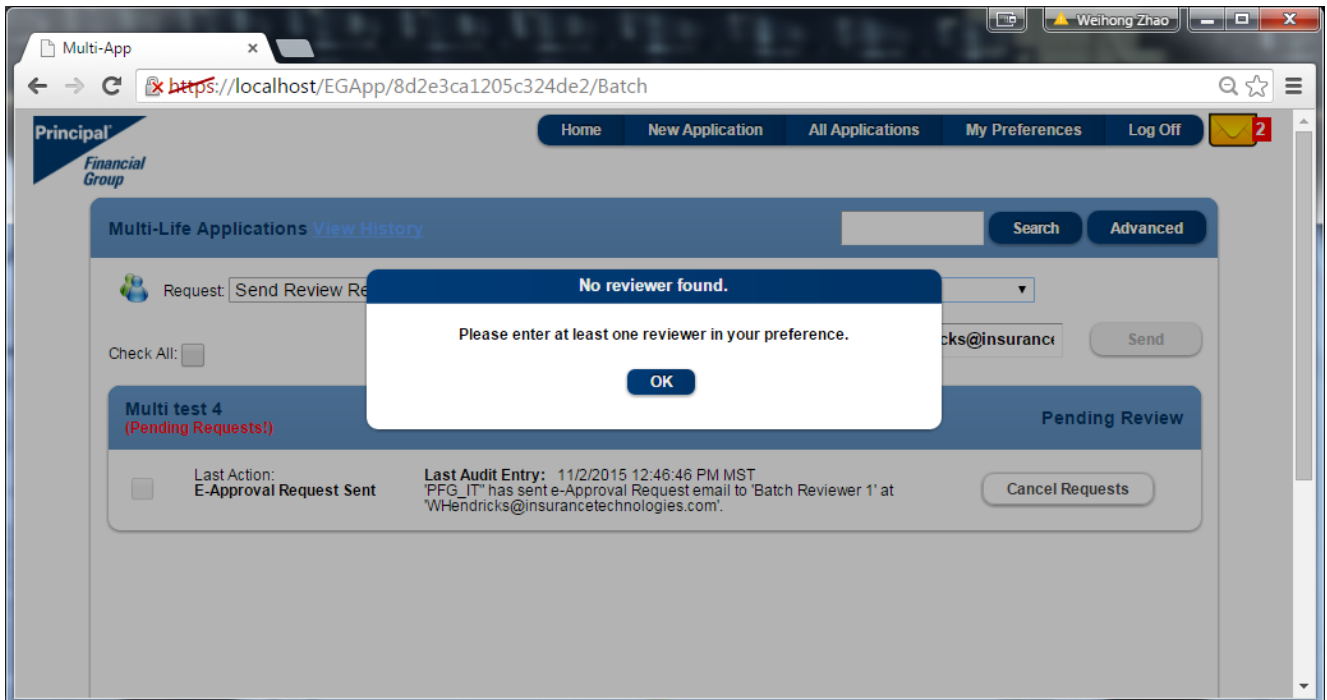


Multi-Life Applications [View History](#)

Request: **Send Review Requests** Company: OE ML Enhancement Test Sort: Date Signer Type:   
 Check All: ☐ Agent Name: PFG\_IT Agent Email: whendricks@insurance Send

Application	Status	Action
Multi test 1	Form Entry	Last Action: Unlocked Last Audit Entry: 11/2/2015 12:51:17 PM MST Application 'Multi test 1' was unlocked and the status changed from 'Pending Review' to 'Form Entry' by 'Batch Reviewer 1'.
Multi test 3	Form Entry	Last Action: Unlocked Last Audit Entry: 11/2/2015 12:47:19 PM MST Application 'Multi test 3' was unlocked and the status changed from 'Pending Review' to 'Form Entry' by 'Batch Reviewer 1'.

## ■ If no reviewers found on “My Preference”, prompt to enter reviewer: (this will not show if agent already has reviewers in preference).



Multi-Life Applications [View History](#)

Request: **Send Review Requests** Company: OE ML Enhancement Test Sort: Date Signer Type:   
 Check All: ☐ Agent Name: PFG\_IT Agent Email: whendricks@insurance Send

**No reviewer found.**


Please enter at least one reviewer in your preference.

**OK**

Application	Status	Action
Multi test 4 (Pending Requests!)	Pending Review	Last Action: E-Approval Request Sent Last Audit Entry: 11/2/2015 12:46:46 PM MST 'PFG_IT' has sent e-Approval Request email to 'Batch Reviewer 1' at 'WHendricks@insurancetechnologies.com'.

## ■ Update reviewer info on “My Preference”

**Principal Financial Group**

Home New Application All Applications **My Preferences** Log Off 



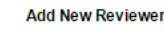
### My Preferences


#### General

Default Jurisdiction	Colorado ▼	My Full Name	PFG_IT
Default Product Type	Disability Income ▼	My Email Address	whendricks@insuranc
Default Time Zone	MST - Mountain Standard Time ▼	Default Page Size for My App. List	10 ▼

Send Message Center Emails ☐


#### Reviewers

	Reviewer Full Name	Reviewer Email Address
	Batch Reviewer 1	WHendricks@insuranc
	Batch Reviewer 2	WHendricks@insuranc
		




## ■ Select “Send Review Request”

**Principal**  
Financial Group

Home New Application All Applications My Preferences Log Off 

Multi-Life Applications [View History](#)


Request: **Send Review Requests**  Company: OE ML Enhancement Test Sort: Date

Check All: ☐ Agent Name: PFG\_IT Agent Email: whendricks@insurance

Multi test 5	OE - Fully Underwritten	Locked
<input type="checkbox"/> Last Action: E-Signature Process Declined	Last Audit Entry: 11/2/2015 2:20:04 PM MST 'pfg_it' declined to use E-Signature processing. Application must be processed manually.	
Multi test 1	OE - Fully Underwritten	Locked
<input type="checkbox"/> Last Action: E-Signature Process Declined	Last Audit Entry: 11/2/2015 2:19:09 PM MST 'pfg_it' declined to use E-Signature processing. Application must be processed manually.	
Multi test 3	OE - Fully Underwritten	Locked
<input type="checkbox"/> Last Action: E-Signature Process Declined	Last Audit Entry: 11/2/2015 2:18:49 PM MST 'pfg_it' declined to use E-Signature processing. Application must be processed manually.	
Multi test 4	OE - Fully Underwritten	Pending Review
<input type="checkbox"/> Last Action: Request Canceled	Last Audit Entry: 11/2/2015 12:46:46 PM MST Application Review request canceled by agent. The application no longer needs further action from 'Batch Reviewer 1' regarding 'Application Review'.	

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## ■ Select apps, or “Check All”, then “Send”:

- Reviewers from “My Preference” will be loaded in a dropdown.
- A new email template is added to accommodate the batch review request.
- This “Send Email Request” is consistent with existing batch requests for Client Fill, Signatures, and Submit.



Multi-Life Applications [View History](#)

Search

Advanced



Request: **Send Review Requests**

Company: **OE ML Enhancement Test**

Sort: **Date**

Check All: ☒

Agent Name: **PFG\_IT**

Agent Email: **whendricks@insuranc**

**Send**

Multi

Edit Email Template



**Batch Reviewer 1 ( WHendricks@insurancetechnologies.com )**

Multi

Subject: **Please review these applications**



Dear [REVIEWER\_NAME],

Multi

Please review the following applications.

Click on the link at the bottom of the email to review and approve the application. You will be asked to acknowledge your acceptance of the disclosure terms and consents. The instruction for completing your 'Electronic Signature' will be provided as well.



Message:

Please use the Passcode to login. I will be providing this Passcode via phone or a separate email.

Multi



**Send Email Request**



**Cancel**

■ “Send Email Request”:

Multi-Life Applications [View History](#)

Request:  Company:  Sort:

Check All: ☒ Agent Name:  Agent Email:

Multi test 5	OE - Fully Underwritten	Locked
<input checked="" type="checkbox"/> Last Action: E-Signature Process Declined	<b>Last Audit Entry:</b> 11/2/2015 2:20:04 PM MST 'pfg_it' declined to use E-Signature processing. Application must be processed manually.	<input type="button" value="Submitted"/>
Multi test 1	OE - Fully Underwritten	Locked
<input checked="" type="checkbox"/> Last Action: E-Signature Process Declined	<b>Last Audit Entry:</b> 11/2/2015 2:18:49 PM MST 'pfg_it' declined to use E-Signature processing. Application must be processed manually.	<input type="button" value="OK"/>
Multi test 3	OE - Fully Underwritten	Locked
<input checked="" type="checkbox"/> Last Action: E-Signature Process Declined	<b>Last Audit Entry:</b> 11/2/2015 2:18:49 PM MST 'pfg_it' declined to use E-Signature processing. Application must be processed manually.	
Multi test 4	OE - Fully Underwritten	Pending Review
<input checked="" type="checkbox"/> Last Action: Request Canceled	<b>Last Audit Entry:</b> 11/2/2015 12:46:46 PM MST Application Review request canceled by agent. The application no longer needs further action from 'Batch Reviewer 1' regarding 'Application Review'.	

1

■ Only ONE email is sent to the reviewer, followed by ONE email with Passcode.

■ The selected applications will be marked as “Pending Request”:

**Multi-Life Applications** [View History](#)  **Search** **Advanced**

Request:  Company:  Sort:

Check All: ☐ Agent Name:  Agent Email:  **Send**

Multi test 5 (Pending Requests!)	OE - Fully Underwritten	Pending Review
<input type="checkbox"/> Last Action: E-Approval Request Sent	<b>Last Audit Entry:</b> 11/2/2015 2:26:33 PM MST 'PFG_IT' has sent e-Approval Request email to 'Batch Reviewer 1' at 'WHendricks@insurancetechnologies.com'.	<input type="button" value="Cancel Requests"/>
Multi test 1 (Pending Requests!)	OE - Fully Underwritten	Pending Review
<input type="checkbox"/> Last Action: E-Approval Request Sent	<b>Last Audit Entry:</b> 11/2/2015 2:26:33 PM MST 'PFG_IT' has sent e-Approval Request email to 'Batch Reviewer 1' at 'WHendricks@insurancetechnologies.com'.	<input type="button" value="Cancel Requests"/>
Multi test 3 (Pending Requests!)	OE - Fully Underwritten	Pending Review
<input type="checkbox"/> Last Action: E-Approval Request Sent	<b>Last Audit Entry:</b> 11/2/2015 2:26:33 PM MST 'PFG_IT' has sent e-Approval Request email to 'Batch Reviewer 1' at 'WHendricks@insurancetechnologies.com'.	<input type="button" value="Cancel Requests"/>
Multi test 4 (Pending Requests!)	OE - Fully Underwritten	Pending Review
<input type="checkbox"/> Last Action: E-Approval Request Sent	<b>Last Audit Entry:</b> 11/2/2015 2:26:32 PM MST 'PFG_IT' has sent e-Approval Request email to 'Batch Reviewer 1' at 'WHendricks@insurancetechnologies.com'.	<input type="button" value="Cancel Requests"/>

## Multi-Life Reviewer

■ Receives an email:



Mon 11/2/2015 2:27 PM

PFG\_IT <IDleApp@idi.mail.principal.com>

Please review these applications

To  Hendricks, Weihong

Action Items

+ Get m

Dear Batch Reviewer 1,

Please review the following applications.

Click on the link at the bottom of the email to review and approve the application. You will be asked to acknowledge your acceptance of the disclosure terms and consents. The instruction for completing your 'Electronic Signature' will be provided as well.

Please use the Passcode to login. I will be providing this Passcode via phone or a separate email.

If you have questions please feel free to contact me.

Sincerely,

PFG\_IT

To review the application, click on <https://localhost/EGApp/PassiveCall.aspx?IBR=uEBH1r%2bhaL7Yl6H%2bteNSUGAu6fWwyMOF4015mJc%2bephWZNdRP9g9bWUbd53b2CFF&O=3554>, and enter the Passcode. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of a new browser window.

## ■ Another email with the passcode



Mon 11/2/2015 2:27 PM

PFG\_IT <IDleApp@idi.mail.principal.com>

Passcode Batch Review

To  Hendricks, Weihong

The Passcode For the Recent Request is F2pzSDpm



■ Click on the link, enter the passcode:

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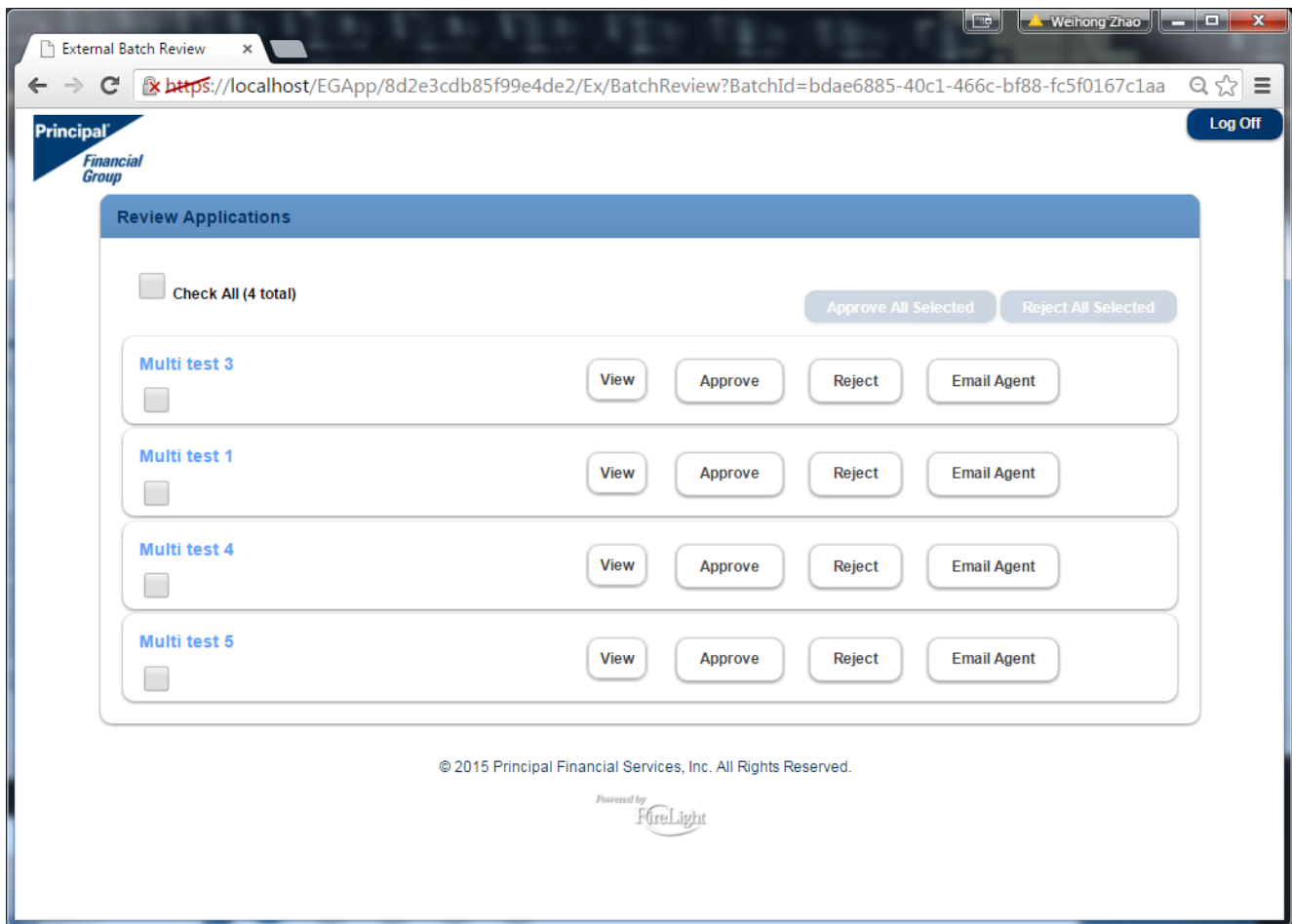
Welcome

Passcode:


[Questions and Support](#)

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**“View” will display the selected app’s Pdf in a new tab:**


**Principal  
Financial  
Group**

Principal Life  
Insurance Company  
P.O. Box 14455  
Des Moines, IA 50306-3455

**Individual Disability Insurance Producer  
Report – OE - Fully Underwritten**

Proposed Insured 11 Policy Number \_\_\_\_\_

**1. Office Contact Information** – Whom should we contact during the processing of this application?

Name <u>BeningOffice Staff</u>	Phone Number <u>(333) 777-8888</u>	Email Address <u>whendricks@insurancetechnologies.co</u>	Field Office – Sub Office # <u>00001</u>
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**2. Compensation Information**

List all Producers to Receive Compensation	Tax ID Number	Statement/Detail Code	Commission Split (must equal 100%)
<b>Primary Servicing Producer</b> (receives correspondence) <u>pfg_it</u>		<u>00001-00107</u>	
Signing producers tax id if signing for Corp./Non-Corp. reference			

**NOTE:** Contractual benefit increases such as FBI and BU, are paid per the split indicated when multiple producers where indicated at new business.

2a) What is the proposed insured's relationship to the Producer? \_\_\_\_\_

**3. Underwriting Requirements** (Please check requirements that have been ordered)

☐ TeleApp Interview (1-888-TeleApp) – Confirmation Number \_\_\_\_\_

If TeleApp has not been scheduled, please call 1-888-TeleApp and schedule at this time.

If English is not the primary language is an interpreter required for TeleApp? ☐ Yes ☐ No

If Yes, list language: \_\_\_\_\_ **Statement of English Understanding (DD992)** is required.

☐ HOBP/HOS ☐ Urine-HIV ☐ Mini/Paramed ☐ EKG Ordered through \_\_\_\_\_

☐ Other \_\_\_\_\_

**4. Discount Information**

Multi Life/Affiliation/Association (discounts listed in a, b and c cannot be stacked)

“Email Agent” will open a pre-filled dialog with selected application in the subject:

**Review Applications**

☐ Check All (4)

**Multi test 3** ☐ **Multi test 1** ☐ **Multi test 4** ☐ **Multi test 5** ☐

**From Name** Batch Reviewer 1

**From Address** WHendricks@insurancetechnologies.com

**To Name** PFG\_IT

**To Address** whendricks@insurancetechnologies.com

**Subject** Question about the application - " Multi test 3"

**Message**

-----  
Yours Sincerely,  
Batch Reviewer 1

Click on the single button of “Approve” or “Reject” will bring up the dialog for the selected application. If multiple apps are checked, the buttons “Approve All Selected” and “Reject All Selected” will be enabled.

Principal  
Financial  
Group
Log Off

Review Applications

☐ Check All (4 total)

Approve All Selected
Reject All Selected

Multi test 3 <input checked="" type="checkbox"/>	View Approve Reject Email Agent
Multi test 1 <input type="checkbox"/>	View Approve Reject Email Agent
Multi test 4 <input checked="" type="checkbox"/>	View Approve Reject Email Agent
Multi test 5 <input checked="" type="checkbox"/>	View Approve Reject Email Agent

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Powered by  
FireLight

Click on “Approve All Selected”:



Log Off

Review Applications

☒ Check All (2 total)

Multi Test 9 ☒ Multi Test 8 ☒

**Approve Selected Applications**

Please review all the Documents, Terms, Conditions & Disclosure carefully.  
Additional document can be [uploaded](#) and will be attached to all selected applications.

Reviewer Full Name:  City:   
State: **Alabama** Today's Date: **11/6/2015**

☒ I Consent

**Selected Applications**  
Multi Test 9  
Multi Test 8

Optional “Reviewer Only File” can be uploaded. Click on the link will show additional file upload info:

**Approve Selected Applications**

Please review all the Documents, Terms, Conditions & Disclosure carefully.  
Additional document can be **uploaded** and will be attached to all selected applications.

**Reviewer Only File. Supplemental documents must be in PDF format and no larger than 20MB**

**2015 Benefits...00000002).pdf**

Reviewer Full Name:  City:   
State: **Alabama** Today's Date: **11/2/2015**

**Selected Applications**  
Multi test 3  
Multi test 4  
Multi test 5

**“I Consent” button will enable when all fields are filled:**

**Approve Selected Applications**


Please review all the Documents, Terms, Conditions & Disclosure carefully.  
Additional document can be [uploaded](#) and will be attached to all selected applications.

**Reviewer Only File. Supplemental documents must be in PDF format and no larger than 20MB**

**2015 Benefits...00000002).pdf**

Reviewer Full Name: **WEIHONG HENDRICKS** City: **COLORADO SPRINGS**

State: **Colorado** Today's Date: **11/2/2015**

 **I Consent**

**Selected Applications**

- Multi test 3
- Multi test 4
- Multi test 5

### Click on “I Consent”:

Please review all the Documents, Terms, Conditions & Disclosure carefully.  
Additional document can be [uploaded](#) and will be attached to all selected applications.

Reviewer Only File. Supplemental documents must be in PDF format and no larger than 20MB

2015 Benefits...00000002).pdf

Reviewer Full Name:  City:

State:  Today's Date:

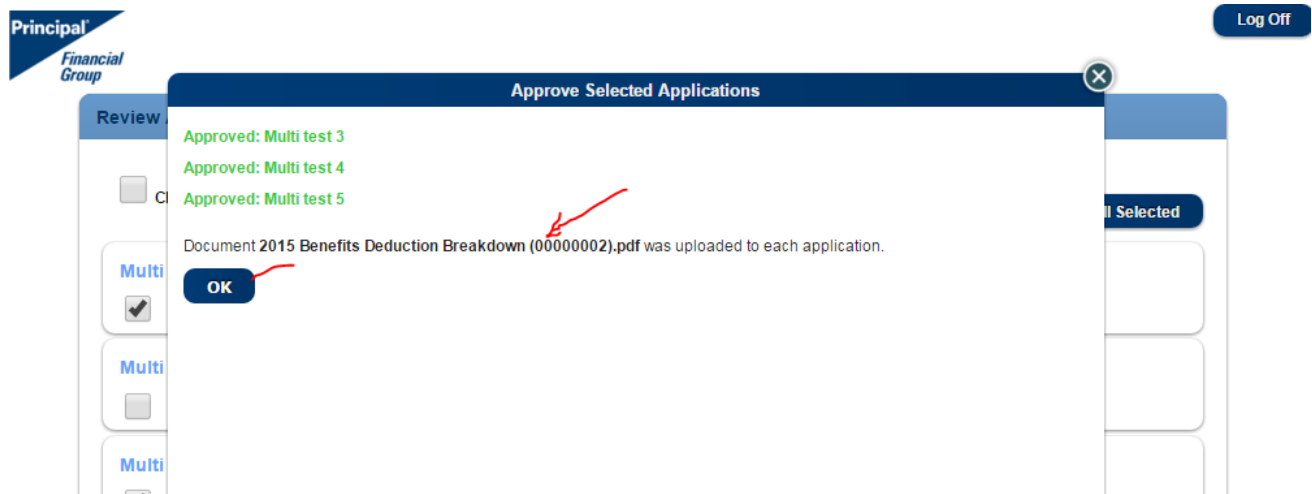
Processing request. Please wait....



Selected Applications

Multi test 3  
Multi test 4  
Multi test 5

### Upon finish:





Click on “OK”: the approve applications will be taken out of the batch:

Principal  
Financial  
Group

Log Off

Review Applications

☐ Check All (1 total)

Approve All Selected
Reject All Selected

Multi test 1

☐
View
Approve
Reject
Email Agent

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Powered by  
FireLight

Click on “Reject”:

Principal  
Financial  
Group

Log Off

Review Applications

☒ Check All (1 total)

Multi Test 1

☒
Multi Test 2

☒
Multi Test 3

Reject Selected Applications

Please review all the Documents, Terms, Conditions & Disclosure carefully.  
Please indicate the reason for your rejection.

Reviewer Full Name:
City:

State: Alabama
Today's Date: 11/6/2015

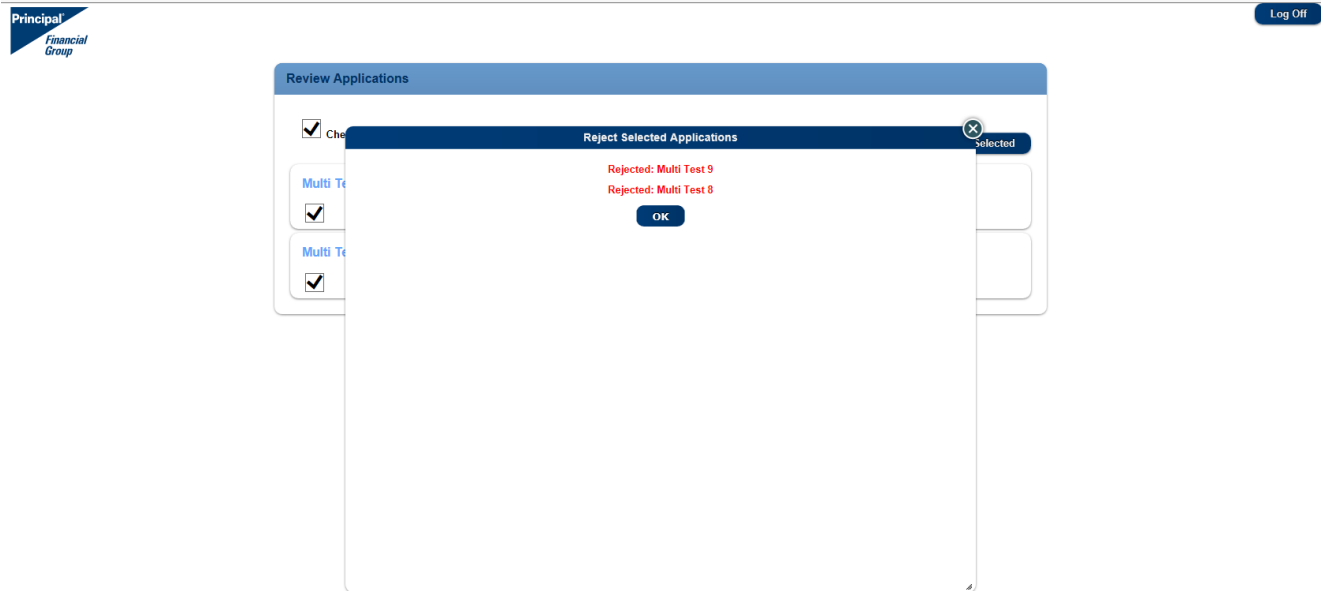
Reason for Rejection:

I Reject

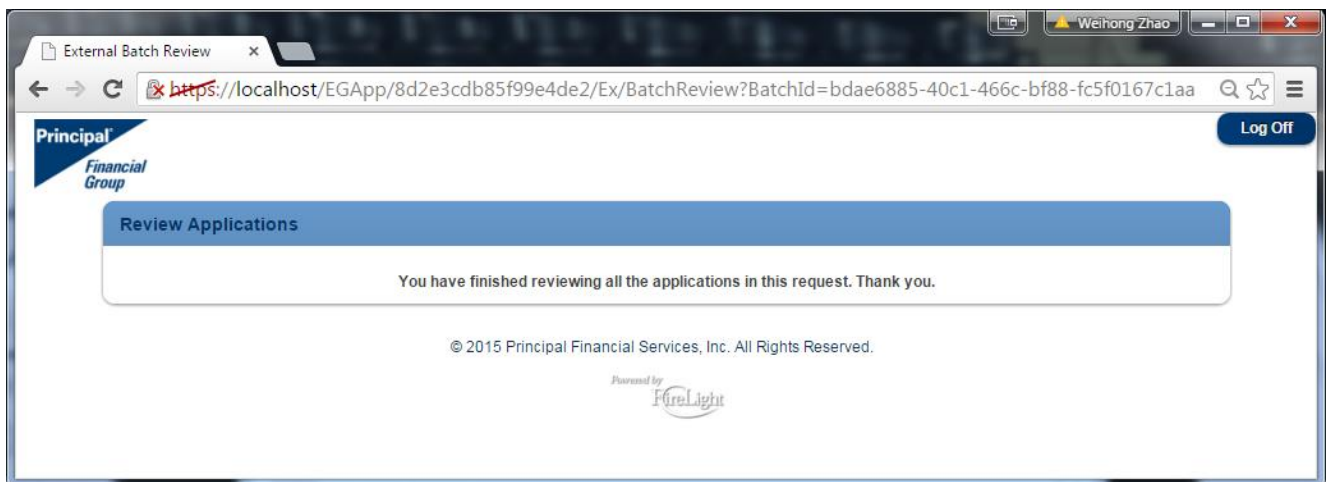
Selected Applications

Multi Test 9  
Multi Test 8

Click on “I Reject”:



Click on “OK”:



**Agent will notice the status change after reviewer’s actions:**

- The **approved** applications will be sent to the next step depends on each application's requirement. – Transmitted or Complete.
- The **Rejected** applications will be unlocked and sent back to "Form Entry", all signatures will be erased. This is the current behavior for manual review.

**My Recent Applications:**

**Multi test 1**  
Status: **Form Entry** Last Update: 11/2/2015 2:52:12 PM

**Multi test 5**  
Status: **Complete** Last Update: 11/2/2015 2:48:56 PM


**Multi test 4**  
Status: **Transmitted** Last Update: 11/2/2015 2:48:41 PM


**Multi test 3**  
Status: **Transmitted** Last Update: 11/2/2015 2:48:36 PM


**Multi test 2**  
Status: **Complete** Last Update: 11/2/2015 12:44:03 PM


1 2 3 4 5 6 All

[Hide Completed](#)


**New Application**  
Build a new application package for your client. Start filling in the information.


**All Applications**  
View and manage your applications. Finish the applications and follow through with your clients.


**My Preferences**  
Set up your own preferences for the system. Update your information.


**Exit**  
To help us improve the performance and functionality, please send us your feedback. Thank you.

## Inside each application's history will show the activities performed by the Batch Reviewer:

Multi test 5

1 FORM ENTRY 
2 SIGNATURES 
3 REVIEW 
4 FINALIZE 
FINISH

OPEN
Producer Report

Application History

Back Office Message	All Back Office Processing Complete.
11/2/2015 2:48:56 PM MST	
Complete	Application 'Multi test 5' is complete.
11/2/2015 2:48:56 PM MST	
Submitted	Application 'Multi test 5' was submitted to the back-office systems for final processing.
11/2/2015 2:48:49 PM MST	
E-Approval Received - Approved	Management Approval Received on application 'Multi test 5' by "from within City".
11/2/2015 2:48:46 PM MST	
PDF Copy Created	A 'Reviewer Uploaded Document' document was uploaded by user 'Batch Reviewer 1'.
11/2/2015 2:48:45 PM MST	
E-Approval Request Sent	'PFG_IT' has sent e-Approval Request email to 'Batch Reviewer 1' at 'WHendricks@insurancetechnologies.com'.
11/2/2015 2:26:33 PM MST	
E-Signature Process Declined	'pfg_it' declined to use E-Signature processing. Application must be processed manually.
11/2/2015 2:20:04 PM MST	

NOTE: 2a) V

3. Under

☐ Te

If T

If Engl

If Yes, list language: \_\_\_\_\_

Statement of English Understanding (DD992) is required.

Labs ☒ NA ☐ HOBP/HOS ☐ Urine-HIV ☐ Mini/Paramed ☐ EKG Ordered through \_\_\_\_\_

☐ Other \_\_\_\_\_

Where will exam take place? ▼