INSURANCE TECHNOLOGIES

Post Submission Status

FIRELIGHT BASE

FireLight®

Platform

POST SUBMISSION STATUS
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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

Design Approach - Post Submission Status

In this enhancement, FireLight will support post submission status changes and post submission agent notifications of the status change. The workflow will include the provider sending a web service call to an outside source to return the current status. The system will first look to the distributor's provider and if there is no code for the service call, it will then look to the carrier's provider. This will ensure this solution to be reusable for both carriers and distributors.

FireLight will update the Display status and External status in the Recent Activities and All Activities as well as notify the agent of the status change. Notification to the agent will occur with the status change, an onscreen icon, message center update, and an email with the details of the status.

Please note, review queue statuses have been updated as a result of this project. The Review Queue statuses will now reside in the Display Status reflecting if the activity has been approved, declined, or needing additional information.

Release Documentation for Post Submission Status

Impacts:

- Optional Usage controlled in the provider
- Provider
- Status Messages post submission
- Emails
- UI Change: Recent Activity and All Activity Icon (new for only Post Submission Statuses)
    - Display Statuses and Review Status –Additional Display statuses have been added including In Carrier Review and Carrier Review Complete. Impact to all clients using Review Status will now show in the display statuses. These will include the review status to change to the following: Review: Approved, Review: Declined, and Review: Info Requested. The Review Status will now reflect “Carrier Status” and display the new Post-submission statuses.
    - API Impact for anyone using the External Review API – Review Statuses will now display in the Display status. There should be no impact to this service, but testing will need to be performed by clients who have this implemented to verify this works as expected.
    - Audit History: A second audit will be created to reflect the Post-submission audits

1 Post Submission Status Backend: Post Submission Changes (Post Completion)

This feature will display the changes needed within the Admin tool to make Post Submission Status changes possible.

1.1 Post Submission Status: Add capabilities to connect the Provider for Post-Submission details

Since the provider will be doing the web service calls and polling post-submission, Base needs a way to connect to the provider in order to make the call post-submission, and display what the call will detail. We need the ability to connect the provider to Base so when a post submission call occurs.

The Provider will also control the frequency of the polling call, and this time will live in the Provider Config for faster updates (if needed) and deployments into Production.

Acceptance Criteria

- After submitting an activity in FireLight, the provider will poll for a status change, and will change according to the call received.

1.2 Post Submission Status: Provider will access message center and trigger email when Post-submission details are returned

Once the provider receives the message back from the post-submission call, the agent will be notified of the change through activity status and email. The provider will also need to access the message center to display these details and updates on the activity.

Acceptance Criteria

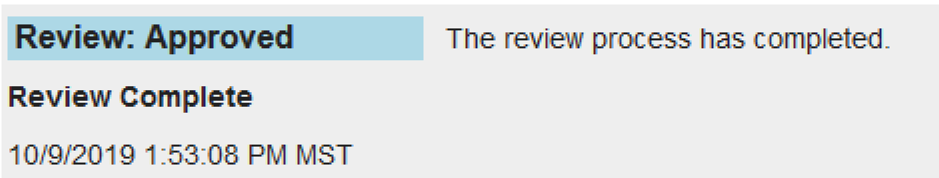
- Agent will receive a notification of status change through the message center.
- Agent will receive a notification of status change through an email
- Status will change based on display update service that provider has access to.
- Provider will provide additional details in the notification
- Review back office service to verify activity's display status is updating once Activity is complete from submission
- Review back office service to verify email is being sent off once Activity has completed submission

1.3 Post Submission Status: Move Review Statuses from External Status to Display Statuses

We will need to add a script to move all of the current Review Status to Display status.

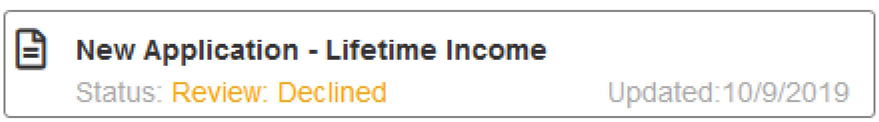
The below are the Review Display Statuses:

Remove Display Status of "Complete" and Review Status: Approved" from the External Status. The Review status is going away. The display status will now show "Review: Approved " in Display Status and audit history. For the PreSubmit Review, we'll display "PreSubmit Review: Approved"



Remove Display Status of " In Review" and "Review Status: More Info Requested" and only display "Review: Info Requested" in Display Status, and "PreSubmit Review: Info Requested" for the Manual Pre-Submission

"Review: Declined" will display for the Display Status for all rejected review Queue Activities



Acceptance Criteria

- Display Status will show the following statuses for Review Queue:
- If Approved:
- Review: Approved = OSJ post-submission
  PreSubmit Review: Approved = OSJ manual pre-submission

  If Declined:
- Review: Declined = OSJ post-submission
- PreSubmit Review: Declined = OSJ manual pre-submission

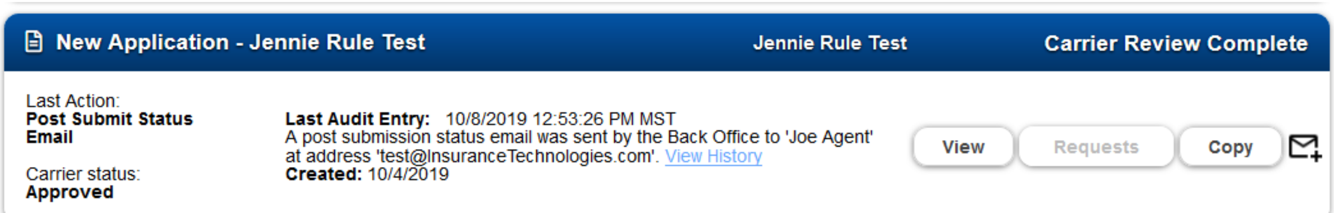
  If More Information needed: Info Requested
- Review: Info Requested = OSJ post-submission
- PreSubmit Review: Info Requested = OSJ manual pre-submission

1.4 Post Submission Status: Create New Display Status for Post-Submission Workflow

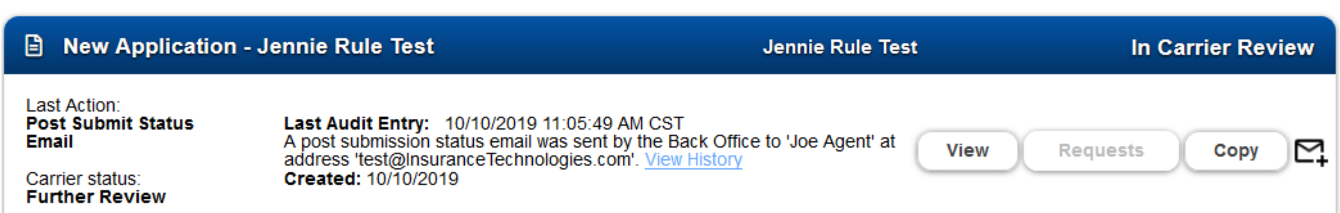
Create two new Display statuses that will display during the Post-Submission workflow.

As soon as the activity has been submitted and approved within the Review Queue (if applicable), then it will be submitted to the Carrier for review, the provider will kick off the Web Service Call, and go from a "Complete" display status to "In Carrier Review". The provider will tell FireLight when to change the status.

This status will continue to display during the review and will change to "Carrier Review Complete" when the provider responds back with x (please refer to the External Status value for the status changes defined by the client)



The display status will stay as "In Carrier Review" if status is y (please refer to the External Status value for the status changes defined by the client)



Also, currently the Review Status is showing as "Review Status", but the verbiage needs to change to "Carrier Status" and will only show when post-submission cases send back a review status of “Approved", "Declined" or "Further Review”.

Acceptance Criteria

- "Review Status" will now be displayed as "Carrier Status" in the external status
- Once an activity has been submitted to a carrier after form entry, signatures, and review queue approval, the Display status will change from "Complete" to "In Carrier Review"
- "In Carrier Review" will show in the display status until external status values defined by the client is received, at which point it will change to "Carrier Review Complete"
- If "Further Review" (or applicable external status defined by the client) is sent back in the response, the activity will still display "In Carrier Review"
- "Approved", "Declined", or "Further Review" will display in the external status

1.5 Post Submission Status: Create Email Template

A new email template will need to be created that will detail the post submission status changes. This email will be sent once the review procedure has completed and will detail the comments from the provider, including actionable items (instructions given). This template will use branding, sub branding, and replacement text. Message displayed will be additional details from the provider referencing the carriers.

We will need a new replacement text for the post-submission status to display.

Template is listed below:

Email Category: System

Email Template Type: Pending Case Status

Email Subject: <CASE_NAME> - <STATUS>

Dear <AGENT_NAME>,

<CASE_NAME> has received the status of <STATUS> from <COMPANY_NAME>.

<MESSAGE>

Acceptance Criteria

- Email will be displayed in the Admin tool under the "System" email category and will display the template located in the description
- Email will be sent once polling response has been received
- Email will be sent using the post submission template
- Client's branding, sub branding, and replacement text will be included and visible
- Email service will allow provider to include the provider generated message
- Replacement values will be replaced with applicable information - CASE_NAME, AGENT_NAME, and MESSAGE will be replaced by the Activity name, Agent's name, and the message generated from the provider.
- The template will display the case name, the current status, agent's name, and the carrier it received the status from.
- The template will include additional details from the provider post-submission call if applicable. If no additional details are able to be displayed, the template will just show the agent name, case name, status, and carrier.

1.6 Post Submission Status: Add Post Submission Status control to List Profile

All post submission Status controls should be moved to a list profile in order to allow for any status alterations or additions at a later date, without involving a release from Base.

For this to occur, we'll need to change the review status enum to a list profile and add the following statuses:

- Approved
- Declined
- Further Review

Acceptance Criteria

- Statuses will be visible in the Carrier Status, and will include the following statuses within the post-submission list profile:
- Approved
- Declined
- Further Review

1.7 Post Submission Status: Manage Handoff from Distributor to Carrier Provider

In a distributor environment, we need the ability to call to the carrier provider to honor the carrier's post-submission functionality. If distributor provider has the functionality "callotherprovider", use it and assume it will call the carrier provider after it's done. If distributor provider doesn't have it, fall back to the carrier provider.

Acceptance Criteria

- Verify that "callotherprovider" is being utilized

1.8 Post Submission Status: External status to display in numeric value in support tool.

The External status is currently displaying the OSJ Value in the support tool. We'll need to have this status displayed within the support tool as either a numeric value or list profile value.

Acceptance Criteria

- Support tool will display either a numeric value or the list profile value

2 Post Submission Status App: Post Submission Display Changes

This feature will describe the changes needed for display changes within the eApp for Post Submission.

2.1 Post Submission Status: Status will change based on Post-Submission Call

Review (Carrier) Statuses will be changed in a post-submission activity according to the polling call. Statuses that need to be added are listed below:

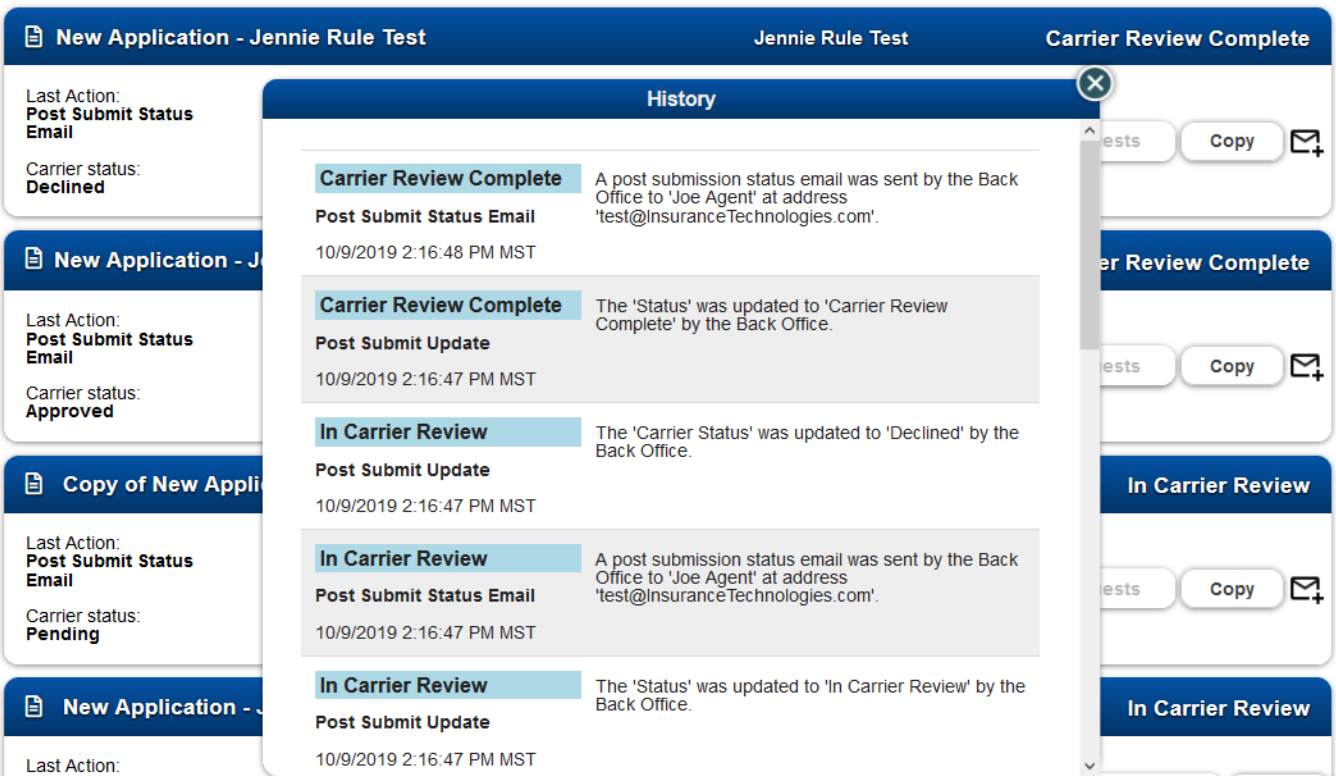
Approved

Declined

Further Review

Status will change to x (please refer to External Status value for the first post-submission call) as soon as the first post-submission call is sent.

Status will change to y (please refer to the External Status value for the status changes defined by the client).



Acceptance Criteria

Example workflow to display these statuses

- In Carrier Review – As soon as the first post-submission call is sent.
- Carrier Review Complete – once x response is received from the Provider.
    - Approved
    - Carrier Status will change to Approved based on External Status call referenced in Provider
    - Declined

- Status will change to Declined based on External Status call referenced in Provider
- Further Review
- Status will change to Declined based on External Status call referenced in Provider

2.2 Post Submission Status: Message Center icon will appear next to Activities under Recent Activity and All Activities

When a polling service occurs, and a notification has been received for an activity, the agent can be notified of this change by receiving a message through the message center. This will be displayed by the number displayed on the message center envelope in the eApp (functionality we have today), and also adding a message center icon with an indicator (a plus sign on the envelope) next to the activity in the Recent Activity window and the All Activities page. This will show up only when a notification is ready for review.

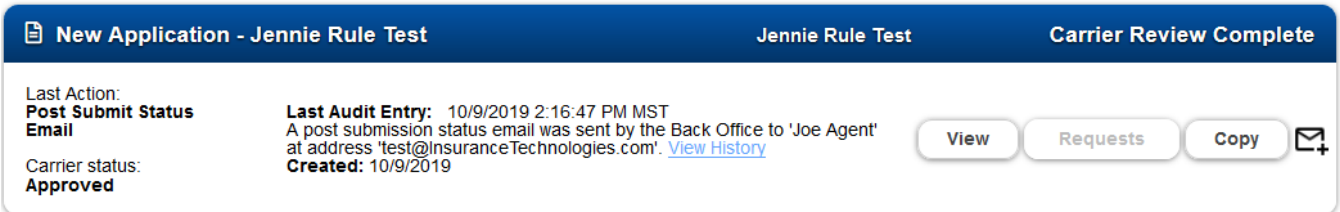
If this envelope is selected, it will display the message immediately. Once the user exits the message, the envelope will still show next to the activity, but will not display the indicator until a new notification is sent.

This icon can be accessed by the Recent Activity or All Activities page, and is clickable through both pages as well. Hover text will be added to the Recent Activity and All Activities in order to instruct the agent that they can click on the icon to receive the message. The message should be "Please click envelope icon to review message"

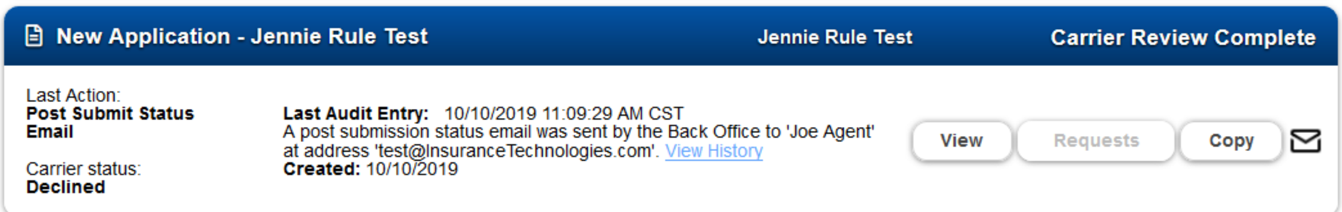
Unread:

Read:

All Activities Unread:



All Activities Read:



Acceptance Criteria

- When a notification comes through the polling call, a message center icon with indicator will display next to the activity
- Once message is accessed, the indicator will disappear, but the envelope will still be visible
- Upon selecting the message center icon either on the Recent Activity or All Activity pages, it will direct the user into the message
- Hover text will be added to the recent activity and all activities that instructs the agent to select the icon to read the message. The message should appear as "Please click envelope icon to review message"

2.3 Post Submission Status: Add New Post Submission Audit History

Add new Post Submission Audit History so the comments from the provider will be updated in the History and audit files. This file is for Post Submission content only, and this information will include any status changes based on post submission review, including time stamps and additional messages.

This is for the history only and not a report.

When Provider information is displayed in the audit, the reference to the provider will be listed as "Back Office".

Acceptance Criteria

- Audit history will include any polling comments listed included within the status change. This includes time stamps and additional details pertinent to the audit from the post-submission polling call.
- Provider Specific Information such as instructions for the agent will not be listed in the History or Audit, but placed in notifications through email and the message center
- Audit list is below:
- In Carrier Review
- Carrier Review Complete
- Approved (Carrier Status)
- Declined (Carrier Status)
- Further Review (Carrier Status)
- Additional details listed within the audit history will be: Packet Name, identifier, submitted to carrier date, post submission web service name
- Any reference to the provider will be listed as "back office"