INSURANCE
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Ability to Disable Send Email for Agent
FIRELIGHT BASE

FireLight®

Platform

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iConnect 269378 Design Approach – Ability to Disable Send Email for Agent

Project Overview

With the implementation of the Agent Remote Sign functionality, carriers should have the ability to disable "Send Email" or disable "Sign Now" for a client and/or an agent separately. To allow this, organization group setting will have separate flags available using which carriers should be able to perform the following actions on the E-signature for client and agent signers:

1. Disable Send Email - Agent
2. Disable Send Email - Client
3. Disable Send Email - Client and Agent
4. Disable Sign Now - Agent
5. Disable Sign Now - Client
6. Disable Sign Now - Client and Agent

Impact:
Four settings will be available on the screen, FLAdmin > Organization Config > Groups > App (tab) > Signing: General (section):

1. Disable Send Email Request for Agent
2. Disable Send Email Request for Client
3. Disable Sign Now for Agent
4. Disable Sign Now for Client

1 Group Setting to Disable Email Request for Agents

Current group setting "Disable Send Email Request" under section "Signing: General" on App tab will be renamed as "Disable Send Email Request for Client".
There will be a new group setting "Disable Send Email Request for Agent" added above "Disable Send Email Request for Client".

Action to be performed for group setting "Disable Send Email Request for Agent":
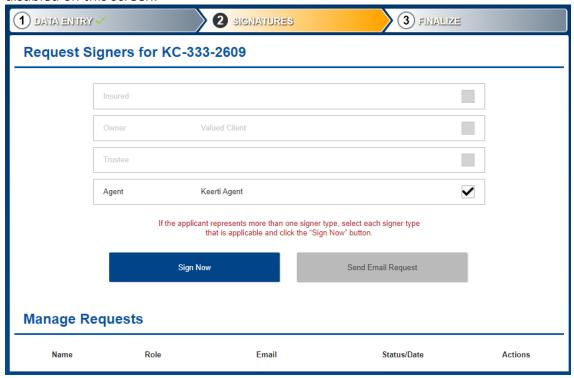
1. When the group setting "Disable Send Email Request for Agent" is checked, at the time of signing ceremony when an agent signer (such as Agent, Agent 2, Agent 3, Producer, etc.) is selected for E-Sign, FireLight will load the Sign Now process without displaying the screen to choose between "Sign Now" and "Send Email Request" options.

2. When the group setting "Disable Send Email Request for Agent" is unchecked (default behavior), at the time of signing ceremony when an agent signer (such as Agent, Agent 2, Agent 3, Producer, etc.) is selected for E-Sign, FireLight will load the screen to choose between "Sign Now" and "Send Email Request" options.

3. When the group setting "Disable Send Email Request for Agent" is checked, the group setting "Disable Sign Now for Agent" cannot be checked at the same time. Both these settings will work as a toggle.

4. By default, new group setting "Disable Send Email Request for Agent" will appear checked for all the groups/organizations. Organizations who wish to use the feature to allow remote signatures for Agent signers will uncheck this setting for required groups.

5. In case the group setting "Disable Send Email Request for Agent" is checked on the MVC interface when the Agent signer is selected for e-sign the document review page will be shown straight away.

Following is the React interface when the Agent signer is selected for e-sign and the group setting "Disable Send Email Request for Agent" is checked. The button "Send Email Request" can be hidden or disabled on this screen.

① DATA ENTRY ✓	② SIGNATURES	③ FINALIZE

Request Signers for KC-333-2609

Insured		☐
Owner	Valued Client	☐
Trustee		☐
Agent	Keerti Agent	☑

If the applicant represents more than one signer type, select each signer type that is applicable and click the "Sign Now" button.

Sign Now	Send Email Request

Manage Requests

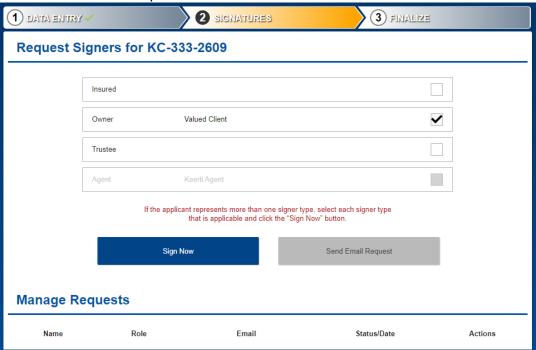| Name	Role	Email	Status/Date	Actions

Action to be performed for group setting "Disable Send Email Request for Client":

1. When the group setting "Disable Send Email Request for Client" is checked, at the time of signing ceremony when a client signer (such as Owner, Investor, Joint Owner, etc.) is selected for E-Sign, FireLight will load the Sign Now process without displaying the screen to choose between "Sign Now" and "Send Email Request" options.

2. When the group setting "Disable Send Email Request for Client" is unchecked (default behaviour), at the time of signing ceremony when a client signer (such as Owner, Investor, Joint Owner, etc.) is selected for E-Sign, FireLight will load the screen to choose between "Sign Now" and "Send Email Request" options.

3. When the group setting "Disable Send Email Request for Client" is checked, the group setting "Disable Sign Now for Client" cannot be checked at the same time. Both these settings will work as a toggle.

4. In case the group setting "Disable Send Email Request for Client" is checked on the MVC interface when the Client (Owner, Insured, Joint Owner, Trustee, etc.) signer is selected for e-sign the document review page will be shown straight away.
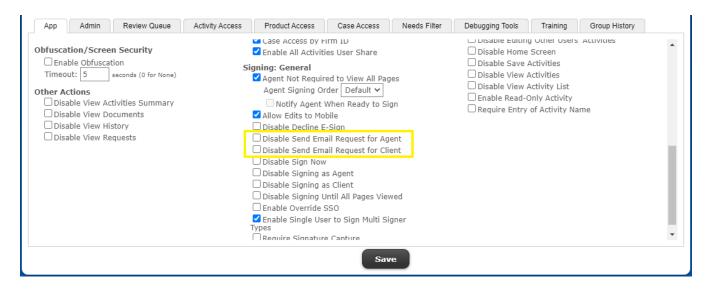
Following is the React interface when the Client (Owner, Insured, Joint Owner, Trustee, etc.) signer is selected for e-sign and the group setting "Disable Send Email Request for Client" is checked. The button "Send Email Request" can be hidden or disabled on this screen.

Below mockup shows of Organization Setting > Groups > App (tab) > Signing: General (Section), where both the group settings to disable send email request options for client and agent signers will be placed.

Acceptance Criteria

- There are two separate group setting present to disable sending email requests for client and agent signers.
- Checking the group setting "Disable Send Email Request for Client" does not load the page to select "Sign Now" and "Send Email Request" for E-Signing process of client signers.
- Checking the group setting "Disable Send Email Request for Agent" does not load the page to select "Sign Now" and "Send Email Request" for E-Signing process of agent signers.
- Options are displayed in alphabetical order.
- Both group settings "Disable Send Email Request for Agent" and "Disable Sign Now for Agent" works as a toggle. When "Disable Send Email Request for Agent" is checked, "Disable Sign Now for Agent" is unchecked and vice-versa.
- Both group settings "Disable Send Email Request for Client" and "Disable Sign Now for Client" works as a toggle. When "Disable Send Email Request for Client" is checked, "Disable Sign Now for Client" is unchecked and vice-versa.
- By Default, group setting "Disable Send Email Request for Agent" is checked, and "Sign Email Request" option is not presented to the agent for signatures, allowing them to only sign the application as "Sign Now".

2 Group Setting to Disable Sign Now for Agents

Current group setting "Disable Sign Now" under section "Signing: General" on App tab will be renamed as "Disable Sign Now for Client".
There will be a new group setting "Disable Sign Now for Agent" added above "Disable Sign Now for Client".
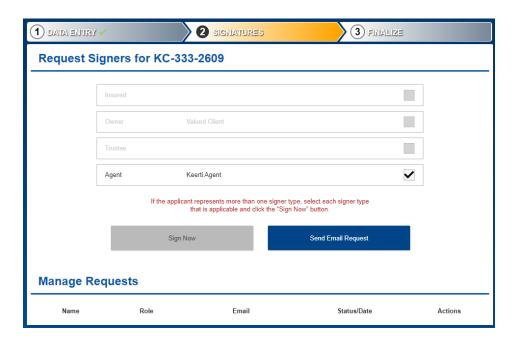
Action to be performed for group setting "Disable Sign Now for Agent":

1. When the group setting "Disable Sign Now for Agent" is checked, at the time of signing ceremony when an agent signer (such as Agent, Agent 2, Agent 3, Producer, etc.) is selected for E-Sign, FireLight will load the Send Email Request process without displaying the screen to choose between "Sign Now" and "Send Email Request" options.

2. When the group setting "Disable Sign Now for Agent" is unchecked (default behavior), at the time of signing ceremony when an agent signer (such as Agent, Agent 2, Agent 3, Producer, etc.) is selected for E-Sign, FireLight will load the screen to choose between "Sign Now" and "Send Email Request" options.

3. When the group setting "Disable Sign Now for Agent" is checked, the group setting "Disable Send Email Request for Agent" cannot be checked at the same time. Both these settings will work as a toggle.

4. In case the group setting "Disable Sign Now for Agent" is checked on the MVC interface when the Agent signer is selected for e-sign the document review page will be shown straight away.

5. By default, new group setting "Disable Sign Now for Agent" appears unchecked for all groups/organizations.

Following is the React interface when the Agent signer is selected for e-sign and the group setting "Disable Sign Now for Agent" is checked. The button "Sign Now" can be hidden or disabled on this screen.
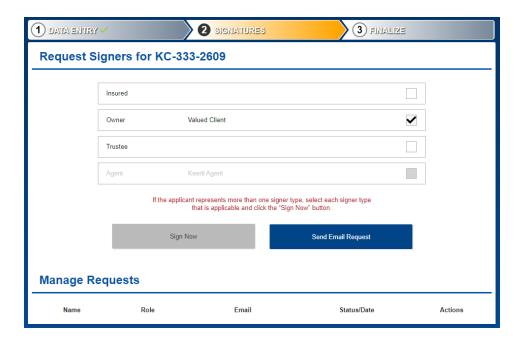
Action to be performed for group setting "Disable Sign Now for Client":

1. When the group setting "Disable Sign Now for Client" is checked, at the time of signing ceremony when a client signer (such as Owner, Investor, Joint Owner, etc.) is selected for E-Sign, FireLight will load the Send Email Request process without displaying the screen to choose between "Sign Now" and "Send Email Request" options.

2. When the group setting "Disable Sign Now for Client" is unchecked (default behavior), at the time of signing ceremony when a client signer (such as Owner, Investor, Joint Owner, etc.) is selected for E-Sign, FireLight will load the screen to choose between "Sign Now" and "Send Email Request" options.

3. When the group setting "Disable Sign Now for Client" is checked, the group setting "Disable Send Email Request for Client" cannot be checked at the same time. Both these settings will work as a toggle.

4. In case the group setting "Disable Sign Now for Client" is checked on the MVC interface when the Client (Owner, Insured, Joint Owner, Trustee, etc.) signer is selected for e-sign the document review page will be shown straight away.
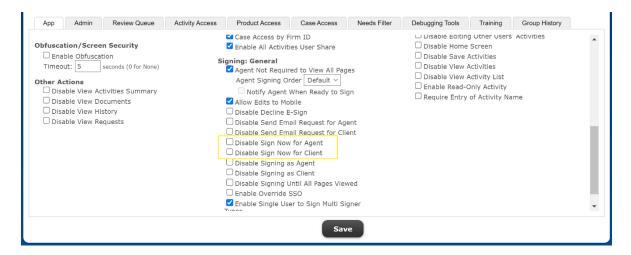
Following is the React interface when the Client (Owner, Insured, Joint Owner, Trustee, etc.) signer is selected for e-sign and the group setting "Disable Sign Now for Client" is checked. The button "Sign Now" can be hidden or disabled on this screen.

Below mockup shows of Organization Setting > Groups > App (tab) > Signing: General (Section), where both the group settings to disable send email request options for client and agent signers will be placed.

Acceptance Criteria

- There are two separate group setting present to disable sign now option for client and agent signers.
- Checking the group setting "Disable Sign Now for Client" does not load the page to select "Sign Now" and "Send Email Request" for E-Signing process of client signers.
- Checking the group setting "Disable Sign Now for Agent" does not load the page to select "Sign Now" and "Send Email Request" for E-Signing process of agent signers.

- Options are displayed in alphabetical order.
- Both group settings "Disable Sign Now for Agent" and "Disable Send Email Request for Agent" works as a toggle. When "Disable Send Email Request for Agent" is checked, "Disable Sign Now for Agent" is unchecked and vice-versa.
- Both group settings "Disable Sign Now for Client" and "Disable Send Email Request for Client" works as a toggle. When "Disable Send Email Request for Client" is checked, "Disable Sign Now for Client" is unchecked and vice-versa.
- By default, new group setting "Disable Sign Now for Agent" is checked for all groups.

3 Create New Data Item for Agent Sign Later

With the introduction of Agent sign later feature, two new data items will be added to allow enabling sign later and sign now options for the Agent signers. These data items can be used to enable/disable setting via writing rules.

1. FLI_DISABLE_AGENT_SIGN_LATER
This data item will be used to disable sign later (remote sign) option for the agent signers.

2. FLI_DISABLE_AGENT_SIGN_NOW
This data item will be used to disable sign now option for the agent signers.

Both the above data items cannot be used in conjunction. If date item "FLI_DISABLE_AGENT_SIGN_LATER" is set to "True", date item "FLI_DISABLE_AGENT_SIGN_NOW" will be set to "False" and vice versa.

Current data items will be utilized for the client signers.
1. FLI_DISABLE_SIGN_LATER
2. FLI_DISABLE_SIGN_NOW

Acceptance Criteria

- Data item "FLI_DISABLE_AGENT_SIGN_LATER" is used to write rules to disable Sign Later option for agent signers.
- Data item "FLI_DISABLE_AGENT_SIGN_NOW" is used to write rules to disable Sign Now option for agent signers.

- Verify: Both the new data items cannot be set to "True" together
- Verify: Data item "FLI_DISABLE_SIGN_LATER" is used to write rules to disable Sign Later option for client signers.
- Verify: Data item "FLI_DISABLE_SIGN_NOW" is used to write rules to disable Sign Now option for client signers.

4 Generate Passcode for Agent Sign Later Without the Setting

Currently, when an external link to request for review is generated, the passcode email is sent to the reviewer overriding the group setting "Allow PassCode Email". Similarly, it will be followed with Agent Send Email Request option.

When agent remote signing is enabled and "Send Email Request" option is selected at the time of signing ceremony for agent signer, the passcode email will be sent bypassing the group setting "Allow PassCode Email". Since the agent authentication is done via Passcode, generation of passcode or sending email containing the passcode will not be managed by the group setting "Allow PassCode Email" for the agent signers.

Acceptance Criteria

- Passcode email for agent remote signing is sent overlooking the group setting "Allow PassCode Email".
- When Send Email Request option is selected for agent to e-sign, the agent receives the passcode email even is the group setting "Allow PassCode Email" for the application owner is turned off.