

# Addition of Reviewer notes to audit history 2.18

# **FIRELIGHT BASE**



**ADDITION OF REVIEWER NOTES TO AUDIT HISTORY 2.18** 

Document Version: 1.x Published: July 01, 2020



#### Insurance Technologies, LLC

Copyright © 2020 Insurance Technologies, LLC, all rights reserved.

Insurance Technologies, ForeSight<sup>®</sup> and FireLight<sup>®</sup> are registered or unregistered trademarks of Insurance Technologies, LLC (IT) in the USA and/or other countries.

ACORD, ACORD ObjX, ACORD OLifE, AL3, ACORD Advantage, ACORD XML, and "Association for Cooperative Operations Research and Development" are registered or unregistered trademarks of ACORD Corporation in the USA and/or other countries.

Microsoft, Microsoft SQL Server, Microsoft Internet Information Server, Windows, and other Microsoft names and logos are either registered or unregistered trademarks of Microsoft Corporation in the U.S.A. and/or other countries.

All other trademarks are the property of their respective owners.

The information contained in this document is current as of the date of the publication. Because Insurance Technologies, LLC must respond to changing market conditions and technology advances, Insurance Technologies, LLC cannot guarantee the accuracy of any information presented after the date of publication.

INSURANCE TECHNOLOGIES, LLC MAKES NO WARRANTIES, EXPRESSED OR IMPLIED, IN THIS DOCUMENT AND HEREBY DISCLAIMS ANY AND ALL SUCH WARRANTIES.

The material contained in this document is considered confidential and the intellectual property of Insurance Technologies, LLC. The recipient is given access to this material on the condition that the recipient (1) will keep the information confidential at all times, and (2) will not copy or modify or share the materials, except as expressly authorized by Insurance Technologies, LLC. The recipient should limit its disclosure of the information and materials only to its employees who have a clear business purpose and need to receive such information and materials and who are bound by confidentiality obligations to the recipient that are at least as protective of such information and materials as those contained herein.

#### **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**

D	esign A	Approach - Addition of Reviewer notes to audit history 2.18	4
1	APF	P: Updates to Review Queue Audit report and History	6
	1.1	Review Queue Audit: Updates to Review Queue History	6
	1.2	Review Queue Audit: Updates to Review Queue Audit report	8
2	Adr	min: Addition of DataItems to include in the Review Queue Audit and History	4
	2.1	Review Queue Audit: Add Dataitem field to Review Queue	4
	22	1-Addition of Dataitems	6



# Design Approach - Addition of Reviewer notes to audit history 2.18

This enhancement will allow for Reviewer and Supervisor comments that are included in the Reviewer Documents to be viewed in both the Review Queue History and Review Queue Audit report. For this to occur, additions will need to be made the Review Queue page. The addition of new FL tags will be needed along with a new section on the review queue page of FL to house these tags. Once in place, the Reviewer will be able to view comments in both the Review Queue Audit History and Review Queue Audit report.

Sequential Review Queues - Reviewer documents and their comments will be retained in the original queue, but since each queue has a brand-new document set, these comments will not be retained across sequential review queues. However, these comments can be copied through a client's provider at this time. If interested in this, please reach out to your project manager.

Impacts:

**Reviewer Documents** 

Admin: Capture the dataitems for each queue in text field titled: Data item to include in review audit

Review Audit: New section within the Review Audit titled: Reviewer Audit Comments

## 1 Admin: Addition of DataItems to include in the Review Queue Audit and History

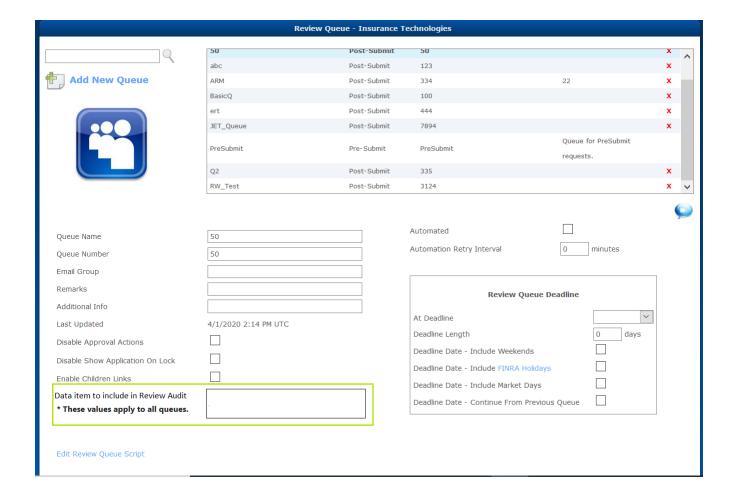
The addition of new comma separated value list of dataitems are needed to be collected in the Admin\Review to support storing the values entered in these data items in the Review audit. This will allow Reviewers to view comments made by other reviewers in the Reviewer Documents.

#### 1.1 Review Queue Audit: Add Dataitem field to Review Queue

The addition of a new section labeled "Data Items to include in the Review Audit" will be added to the Admin\Review Queue. There will be a text box where the admin can enter a list of data items in a comma separated value list. Any data items in this box that appear in the reviewer documents will be stored in the reviewer audit and history (see other stories). (This will work like the additional information fields.)



This section will appear for each queue, but the values are not unique per selected Queue. Therefore, we will need to add \*These values apply to all Queues\* as shown in the below example.



#### **Acceptance Criteria**

- "Data item to include in Review Audit" and "
- These values apply to all queues." label is present with a text box.
- The text box is editable and supports data items in a comma separated value list.
- One or many data items can be entered and saved.
- Data item to include Review Audit section appears for each queue but the values are not unique per Queue.



#### 1.2 1-Addition of Dataitems

The addition of two dataitems will be needed to access comments made by a specific reviewer within the Review Queue Audit History and the Review Queue History.

The dataitems that will be defined by the client.

### 2 APP: Updates to Review Queue Audit report and History

Enhancements to both the Review Queue Audit history report and Review Queue history log will be needed to show reviewer comments entered into the Reviewer documents for the data items listed in the Admin\Review Queue.

#### 2.1 Review Queue Audit: Updates to Review Queue History

The Review Queue history will be updated to capture the the values entered in the Reviewer Documents for the data items listed in the Admin\Review Queue.

A new section in the Review Queue History is required to store Reviewer Comments. Label the section Reviewer Comments.

If the data items listed in the Admin\Review Queue are not null, we will store those values in the Review Queue History. The Review Queue history will include a timestamp when the data items are saved and not null along with the user who entered the data items and the value of the data items at that time it is saved. We will need to support alpha numeric values in the text fields.

The history is viewable throughout all review queues. If there are multiple queues, the comments in the reviewer documents in the defined data items will remain in the review queue history for the subsequent review queues.



Status as of 4/7/2020 23:45 PM EST: Approved

HISTORY:

User Name: Approved

4/7/2020 23:45 PM EST Remarks: This application has been approved to

move to the next step of the review process by Jon Doe

Supervisor Comments: Application approved

User Name: Lock

4/7/2020 23:20 PM EST Remarks:

Reviewer Comments: Thank You

User Name: ReviewerDocuments

4/7/2020 23:12 PM EST Remarks:

Supervisor Comments: Application under Review

ReviewerDocuments User Name:

4/7/2020 23:00 PM EST Remarks:

Reviewer Comments: Application has been edited

and ready for further review

ReviewerDocuments User Name:

4/7/2020 22:48 PM EST Remarks:

Supervisor\_Comments: Application needs edits

Lock User Name:

4/7/2020 22:45 PM EST Remarks:

Reviewer Comments: Please review Application

#### Acceptance Criteria

- Reviewer Comments section is added to the Review Queue history for each review queue.
- Each comment is timestamped.
- Every time a comment is added for the defined data items, the audit is added.



- Audit comments are present in the history for the queue. the logged in user is indicated for the Reviewer.
- The history is viewable for the subsequent review queues.

#### 2.2 Review Queue Audit: Updates to Review Queue Audit report

The Review Queue Audit History Report will now include a new section titled Reviewer comments. This section will capture the values for the data items listed in the Admin\Review Queue. As the reviewer enters data into the Reviewer Documents into the fields with the defined data items, the text entered at that time will be stored and displayed in the Reviewer Audit. We will need to support alpha numeric values in the text fields.

The Reviewer Audit comments section will allow for the following:

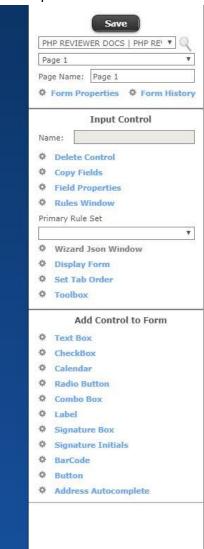
- A timestamp when each reviewer added a comment into the data items
- Session user ID
- The data items will be listed along with the audit comments saved for the values of that data items.

Example: In the below example, the data items listed in Admin\Review Queue are Reviewer\_Comments and Supervisor\_comments.

Here is the Reviewer Document with the data items.



#### Mockup:





Production Points [TextBox_1	
Reviewer Notes:	
Reviewer_Comments	
Supervisor_Comments	



Review Queue Activity Audit - 67b09d42-61cd-4f8d-adb5-8fb705b8dba5					
Timestamp (UTC)	Session User	Audit Message			
4/7/2020 22:45		Auto Added to Queue			
4/7/2020 22:48	it	Locked for Review			
4/7/2020 22:48	it	Application is unlocked and released back in the queue.			
4/7/2020 22:50	it	Locked for Review			
4/7/2020 22:50	it	This application has been processed and approved by the reviewer 'it' and has been released to the carrier. Please contact the carrier if you have any further questions about the status of this application.			
4/7/2020 22:50	it	A review queue approval email was sent to it.			

Reviewer Audit Comments					
Timestamp (UTC)	Session User	Audit Comments			
4/7/2020 22:45	ChrisH_FLADEMO	Reviewer_Comments: Please review Application			
4/7/2020 22:48	ChrisH FLADEMO	Supervisor_Comments: Application needs edits			
4/7/2020 23:00	ChrisH FLADEMO	Reviewer_Comments: Application has been edited and ready for further review			
4/7/2020 23:12	ChrisH FLADEMO	Supervisor_Comments: Application under Review			
4/7/2020 23:20	ChrisH FLADEMO	Reviewer_Comments: Thank You			
4/7/2020 23:45	ChrisH FLADEMO	Supervisor_Comments: Application approved			

#### Signature Summary

#### Acceptance Criteria

- Reviewer Audit Comments section is added to the Review Queue Audit history. This will repeat per queue so that it is clear which queue the comments were added.
- Each comment is timestamped
- Session ID of user is present with all added comments
- Audit comments are present, and the data item is indicated before the comment. Example, Reviewer Comments: Please Review Application
- The audit for these data items is added for each review queues.
- If there are multiple review queues, the Reviewer comments will be under each queue. So, this will repeat under each queue so that it is clear which queue the comments were added.



	Acce	ptance	Criterio	7
--	------	--------	----------	---

CONFIDENTIAL ©2020 Insurance Technologies, LLC. All rights reserved.