INSURANCE TECHNOLOGIES

Generate unique Addendum doc for each form in the Activity

FIRELIGHT BASE

FireLight®

Platform

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iConnect 244655 Design Approach - Generate unique Addendum doc for each form in the Activity

Project Overview

Currently when Display PDF action is performed for an application with soft limits in the field properties, a single Addendum document is generated at the end of the form package that includes all soft fields present on all forms in an application. With this enhancement, a separate addendum document will be created for each form containing soft limits, at the time of Print PDF action. Each individual addendum will generate directly after the corresponding form and not at the end of the package.

This change will impact Print PDF functionality for all the activity types, except for Print Forms activity. This enhancement will be a global change for addendums and will not be controlled by an Admin setting.

Impacts: Individual Addendum document will be generated directly behind the corresponding form with updated reference functionality to easily identify and match the form field with the overflow content.

- When soft limit is set and exceeded, impacts to FL App -> Activity -> Other Actions -> Display/Print PDF - Show Addendum doc for each for the form in the activity in the same sequence of the forms. This change will not impact Print Forms activity.
- Provider updates - Prior to December, outbound feeds contained a single addendum. After the December release the outbound feed could an addendum for each form. Integration providers are being evaluated individually to determine additional impact due to the way some providers manage addendums. Clients should also evaluate their systems that are receiving an outbound feed from FireLight to ensure there is no specific logic around how addendums are being processed.

1   Add Addendum doc for each of the form in the Activity

Currently, at the time of Display/Print PDF action, all values that exceed the "Soft Limit" set in the field properties are displayed on a single Addendum document at the end of the activity package.

FireLight will be enhanced to generate an individual Addendum document for each form present in the activity when text values exceed the "Soft Limit" set in field properties. All overflow content for the same form will be displayed on the same Addendum document. The individual Addendum content will also be enhanced for ease of use, as well as changing the order of generation so the individual
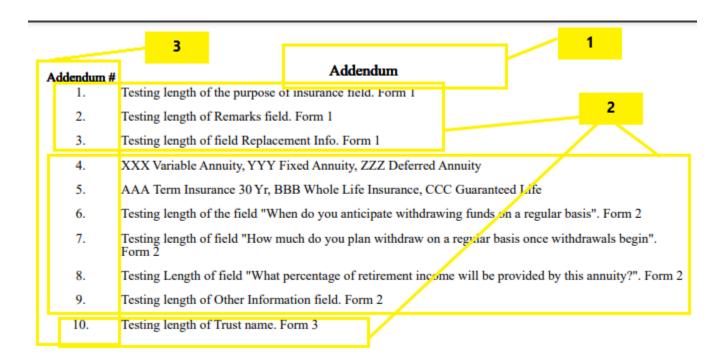
Addendum follows the corresponding form in the package order instead of being produced at the end of the package.

Below is the mockup of how Addendum document is printed currently, and highlighted sections will be impacted with new changes.

1. Addendum document for each form will include the form name in the title in the format "Addendum Document: <Form Name>". Both overflow fields and their overflow content will be represented in tabular format. Column heading for the field will be "Reference ID" and column heading for the content will be "Overflow Content".

2. Addendum fields for each form will be shown in its Addendum document. The reference on the form will match the reference on the addendum document (i.e.: See #1, Addendum - 1035 Exchange Form). The format for Addendum field will be "See #<Reference ID>, Addendum - <Form Name>".

3. Numbering for these soft limit fields will be in continuous sequence as per the order of the forms selected for printing.

Addendum

Addendum #	
1.	Testing length of the purpose of insurance field. Form 1
2.	Testing length of Remarks field. Form 1
3.	Testing length of field Replacement Info. Form 1
4.	XXX Variable Annuity, YYY Fixed Annuity, ZZZ Deferred Annuity
5.	AAA Term Insurance 30 Yr, BBB Whole Life Insurance, CCC Guaranteed Life
6.	Testing length of the field "When do you anticipate withdrawing funds on a regular basis". Form 2
7.	Testing length of field "How much do you plan withdraw on a regular basis once withdrawals begin". Form 2
8.	Testing Length of field "What percentage of retirement income will be provided by this annuity?". Form 2
9.	Testing length of Other Information field. Form 2
10.	Testing length of Trust name. Form 3

Using above example, below mock-ups show how each of the Addendum document will be created for multiple copies of the same forms in the package (form indexing).

Fields on Form 1

ADDRESS (number and street, city, state, zip)

See #1, Addendum - WS Annuity Form

HOW MANY BENEFICARIES WILL BE ASSOCIATED WITH THIS APPLICATION? 1

1. ☐ **PRIMARY**
   ☐ **IF TRUST, NAME OF TRUST** See #2, Addendum - WS Annuity Form
   ☐ **CHECK HERE IF THIS BENEFICARY IS IRREVOCABLE.**

Addendum Document 1

Addendum - WS Annuity Form

Reference ID	Overflow Content
1.	111 Southern Parkview Avenue
2.	Name of Trus

Fields on Form 2

Page 6 of 8

NAME (first Middle Initial, last)

| See #3, Addendum - WS Annuity Form 2 | | Customer |

ADDRESS (number and street, city, state, zip)

See #4, Addendum - WS Annuity Form 2

Denver

Addendum Document 2

Addendum - WS Annuity Form 2

Reference ID	Overflow Content
3.	Most Valued
4.	222 Northern Parkview Avenue

Acceptance Criteria

- Unique Addendum documents are printed immediately following the corresponding form instead of the end of the entire PDF package.
- In unique Addendum documents, form names are referenced with a numeric value to represent the overflow content.
- Form name is present in the title for each of the unique Addendum document based on the forms they are representing.
- Addendum reference values for overflow content match the correct data value on the form.

- Multiple versions of the same form (form indexing) are easily identified with a numeric reference following. Example: "Addendum – Form Name", "Addendum – Form Name 2".
- Each individual addendum gets generated directly after the corresponding form and not at the end of the package.
- Unique Addendum document is generated for each form in the activity when text fields exceed the soft limit.
- This change impacts Print PDF functionality on all the activity types except the Print Forms activity.
- Potential provider changes are evaluated for changes due to individual addendums printing.