

## iConnect 168121 Design Approach

### Project Overview

Allow users to pass in manual review queue information through the incoming SSO

### Features/Requirements

1. Allow 1228 to contain reviewer information
2. Display reviewer name and email address on preferences. but don't allow edits.
3. Display reviewer name and email address on manual review page, but do not allow edits.

### Use Cases / Workflow Changes

To use this feature, add a reviewer party with the relationship rolecode for reviewer: OLI\_REL\_REVIEWER (255). Note that the related reviewer party needs to come after the agent party in the 1228 if the agent party is not defined within a relationship node. Without the relationship node for the agent, the first party information is assumed to be the agent.

### App Changes

The reviewer name and address passed in the 1228 will display on the preferences and manual review pages.

### UI Mock Ups

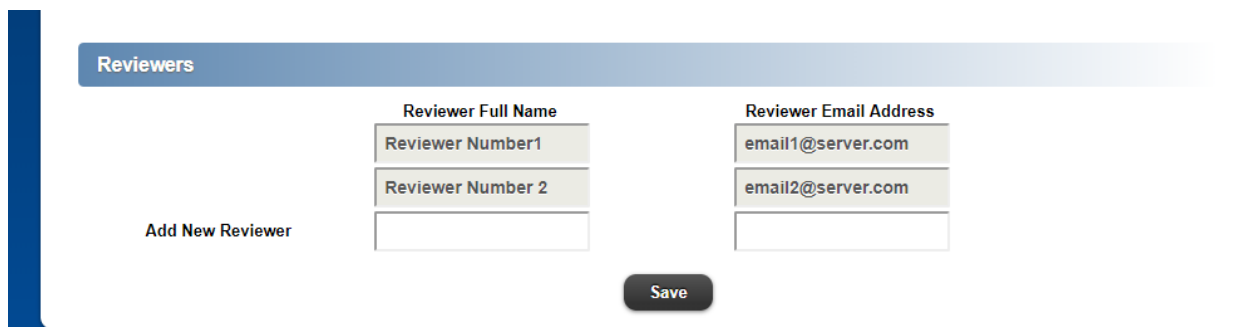
```
<TXLife xmlns="http://ACORD.org/Standards/Life/2">
  <UserAuthRequest>
    <!--{Valid Login Info Here}-->
  </UserAuthRequest>
  <TXLifeRequest>
    <TransRefGUID></TransRefGUID>
    <TransType tc="1228"></TransType>
    <TransSubType tc="22800"></TransSubType>
    <OLife>
      <SourceInfo>
        <CreationDate>2018-01-09</CreationDate>
        <CreationTime>16:57:16.7798868-07:00</CreationTime>
        <SourceInfoName>IT</SourceInfoName>
      </SourceInfo>
      <Party id="Agent_Party">
        <PartyTypeCode tc="1">Person</PartyTypeCode>
        <FullName>IT TESTER FULLNAME</FullName>
        <EmailAddress>
          <AddrLine>AgentEmail@emailserver.com</AddrLine>
        </EmailAddress>
        <Person />
        <Producer>
          <CarrierAppointment>
            <CompanyProducerID>Login ID</CompanyProducerID>
            <CarrierCode>CarrierCodeAbbr</CarrierCode>
          </CarrierAppointment>
        </Producer>
      </Party>
    </OLife>
  </TXLifeRequest>
</TXLife>
```

```

    </Producer>
  </Party>
  <Party id="Party_Reviewer1">
    <FullName>Reviewer Number1</FullName>
    <EmailAddress>
      <AddrLine>email1@server.com</AddrLine>
    </EmailAddress>
  </Party>
  <Party id="Party_Reviewer2">
    <FullName>Reviewer Number3</FullName>
    <EmailAddress>
      <AddrLine>email2@server.com</AddrLine>
    </EmailAddress>
    <Person>
      <FirstName>Reviewer</FirstName>
      <LastName>Number 2</LastName>
    </Person>
  </Party>
  <OLifeExtension VendorCode="25">
    <UserRoleCode tc="10">OverRide</UserRoleCode>
  </OLifeExtension>
  <Relation OriginatingObjectID="Relation_Reviewer1" RelatedObjectID="Party_Reviewer1">
    <OriginatingObjectType tc="4">OLI_HOLDING</OriginatingObjectType>
    <RelatedObjectType tc="6">OLI_PARTY</RelatedObjectType>
    <RelationRoleCode tc="255">OLI_REL_REVIEWER</RelationRoleCode>
  </Relation>
  <Relation OriginatingObjectID="Relation_Reviewer2" RelatedObjectID="Party_Reviewer2">
    <OriginatingObjectType tc="4">OLI_HOLDING</OriginatingObjectType>
    <RelatedObjectType tc="6">OLI_PARTY</RelatedObjectType>
    <RelationRoleCode tc="255">OLI_REL_REVIEWER</RelationRoleCode>
  </Relation>
</OLife>
</TXLifeRequest>
</TXLife>

```

Example 1228



The App Portal's Preferences page will contain the passed in values for reviewer name and email.

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

Your Name:	IT TESTER FULLNAME	Subject:	Please review the following application for 'Product NAME'
Your Email:	AgentEmail@emailprov		
<input type="checkbox"/> Reviewer Name:	Added Reviewer		<p>Dear Reviewer,</p> <p>Please review  CLIENT_NAME 's application for 'Test Product' of Insurance Technologies.</p> <p>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.</p> <p>Please use the Passcode to login. I will be providing this Passcode via phone or a separate email.</p> <p>If you have questions please feel free to contact me.</p>
Reviewer Email:	dfd@dd.com		
<input checked="" type="checkbox"/> Reviewer Name:	Reviewer Number1		
Reviewer Email:	email1@server.com		
<input checked="" type="checkbox"/> Reviewer Name:	Reviewer Number 2		
Reviewer Email:	email2@server.com		
	<a href="#">Add Reviewer</a> <a href="#">Reset</a>	Message:	

Send Email to Reviewer will show reviewers passed into the 1228. Reset button will not remove reviewers sent in the 1228.

## How to Enable and Use This Feature

Feature is automatically enabled.

## Areas Impacted

System Area	Yes	Comment
<b>Admin Tool</b>		
- Form Library		
- Design Forms		
- Profile Administration		
- Reports		
- Deployment		
<b>FireLight App</b>		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review	Y	Displays disabled reviewer information that is passed in the 1228
- User Preferences	Y	Displays disabled reviewer Information that is passed in the 1228

- Inbound Integration	Y	XML within 1228 has new node for reviewer info.
- Outbound Integration		
- PDF Generation		
- Email System		
<b>FireLight Console</b>		
- Windows		
- iOS		
<b>Other Systems</b>		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		