
Upload Documents send to Distributor or Carrier only

FIRELIGHT BASE

FireLight®

Platform

UPLOAD DOCUMENTS SEND TO DISTRIBUTOR OR CARRIER ONLY

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Insurance Technologies, LLC

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iConnect 249948 Design Approach - Upload Documents send to Distributor or Carrier only

Project Overview

Currently in FireLight, the Uploaded documents visibility is set for multiple types of visibility including carriers to receive the documents, but it is not set up for Distributors to only receive their forms. In this enhancement, FireLight will need to add in a Distributor Only visibility that will apply to uploaded documents within the Data Entry and Reviewer Document section. This will also apply for the forced template upload as well as documents that are optionally uploaded by an agent. With this in place, Distributor only uploaded documents can arrive at their proper destination, and not be sent to the Carrier. Since this is being applied to a list profile, this will only impact clients who request a Distributor Only visibility placed in their list profile.

Impacts:

Uploaded Documents List Profile - The ability to add this to the list profile will be added, but a client will still need to request this to be added to their specific list profile so it can be applied to their specified document tag

1 Update List Profile to add Distributor only Visibility

We need to update the current list profile that is set for the Document Tags to allow for a Distributor Only visibility. This will allow distributors to be able to create a "distributor only" document tag which will send the documents to only that distributor, and not to the carrier.

This visibility name will be "DistributorOnly"

This list profile visibility will need to affect both the Data Entry uploaded documents and the Reviewer uploaded documents.

Acceptance Criteria

- (Dev Test)
- The current list profile that controls the visibility of the document tags will be updated to include a "distributoronly" visibility function. The name will be "DistributorOnly"
- This list profile will apply to both the Data Entry and the Reviewer uploaded documents

2 Apply DistributorOnly visibility before "Get Historical Documents" within the provider

In the provider, when the "GetHistoricalDocuments" is being called, we need to look for the "DistributorOnly" visibility and remove any files that are associated with it from the Carrier send.

Acceptance Criteria

- When GetHistoricalDocuments is called, any files that have the "DistributorOnly" visibility set will be removed from the send to the carrier.