
Include Signature Type Filter Advanced Search

FIRELIGHT BASE

FireLight®

Platform

INCLUDE SIGNATURE TYPE FILTER ADVANCED SEARCH

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Insurance Technologies, LLC

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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>

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iConnect 257362 Design Approach - Include Signature Type Filter Advanced Search

Project Overview

FireLight users would like to enhance the Advanced Search fields in All Activities and Review Queue to feature a search item by e-signature. A new field will be added to allow users to perform a search using an e-signature filter.

Impacts:

- New search field for Advanced Search: All Activities
- New search field for Advanced Search: Review Queue

1 Add New Filter Type to All Activities

A new search field will be added to All Activities, Advanced Search for "Signature Type". The new field will allow a search to be performed for cases using the "FLI_DECLINED_ESIGN" tag, or by accepting or declining e-Sign in FireLight. Options in the search dropdown will be "e-Signature" or "Wet Signature".

The new "Signature Type" search field will first look at the Status before applying the search for the "Signature Type". For statuses of "Data Entry" and "Pre-Submit Review", the "Signature Type" may not be determined because the user has not yet accepted or declined e-Signature. In these instances, the activity will return in the search results under "e-Signature". For example, if the "Status" is "Data Entry" and "Signature Type" selected is "Wet Signature", the search results will come back with zero results. Exception to this scenario: "FLI_DECLINED_ESIGN" tag is used in rules and signature type is established by use of this tag.

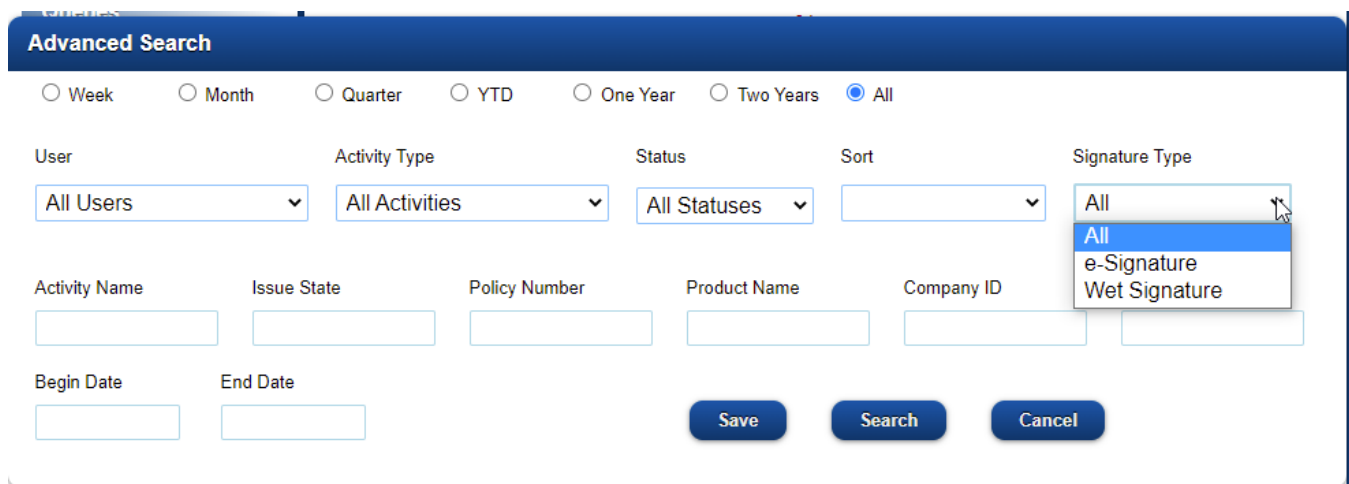
The screenshot displays the 'Advanced Search' interface. At the top, there are radio buttons for time periods: Week, Month (selected), Quarter, YTD, and All. Below this, a row of filters includes 'User' (set to 'My Activities'), 'Activity Type' (set to 'Application'), 'Status' (set to 'Data Entry'), 'Sort' (set to 'Last Update'), and 'Signature Type' (a dropdown menu). The 'Signature Type' dropdown is open, showing three options: 'All' (highlighted), 'e-Signature', and 'Wet Signature'. Below the filters are input fields for 'Activity Name', 'Issue State', 'Policy Number', 'Product Name', 'Company', and 'Comment'. At the bottom, there are 'Begin Date' and 'End Date' fields, and three buttons: 'Save', 'Search', and 'Cancel'.

Acceptance Criteria

- Using a rule containing the "FLI_DECLINED_ESIGN" tag will allow activities to show on the new "Signature Type" search field for All Activities Advanced Search.
- Declining e-Signature or Accepting e-Signature reflects the appropriate activities in the search results.
- Statuses of "Data Entry" and "Pre-Submit Review" are prior to signing, so when used in conjunction with the "Signature Type" of "e-Signature", all search results are returned.
- Statuses of "Data Entry" and "Pre-Submit Review" are prior to signing, so when used in conjunction with the "Signature Type" of "Wet Signature", no search results are returned.
- Activities using "FLI_DECLINED_ESIGN" tag in rules will return search results based on the tag, so search results for statuses of "Data Entry" and "Pre-Submit Review" could return search results for "Signature Type" of "Wet Signature".

2 Add New Filter Type to Review Queue

A new search field will be added to Review Queue, Advanced Search for "Signature Type". The new field will allow a search to be performed for cases using the "FLI_DECLINED_ESIGN" tag, or by accepting or declining e-Sign in FireLight. Options in the search dropdown will be "e-Signature" or "Wet Signature".



Advanced Search

☐ Week
 ☐ Month
 ☐ Quarter
 ☐ YTD
 ☐ One Year
 ☐ Two Years
 ☒ All

User:
 Activity Type:
 Status:
 Sort:
 Signature Type:

Activity Name:
 Issue State:
 Policy Number:
 Product Name:
 Company ID:

Begin Date:
 End Date:

Acceptance Criteria

- Using a rule containing the "FLI_DECLINED_ESIGN" tag will allow activities to show on the new Signature Type search field for Review Queue Advanced Search.
- Declining e-Signature or Accepting e-Signature reflects the appropriate activities in the search results.