



INSURANCE
TECHNOLOGIES

FireLight Application Ownership Transfer Design Approach



Published:
1/22/2016 v1.0



Insurance Technologies, LLC

Copyright © 2016 Insurance Technologies, LLC, All rights reserved.

Insurance Technologies ForeSight® and FireLight® are trademarks of Insurance Technologies, LLC (IT) in the USA and other countries.

Microsoft, Microsoft SQL Server, Microsoft Internet Information Server, MS-DOS, Windows, and other Microsoft products are either registered trademarks or 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 represents the current view of Insurance Technologies, LLC on the issue discussed as of the date of the publication. Because Insurance Technologies, LLC must respond to changing market conditions and technology advances, it should not be interpreted to be a commitment on the part of Insurance Technologies, LLC and 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.

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 (which may include copying this document) of the information and materials to employees within its own organization whom are duly licensed to receive such information and materials.

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

Application Transfer Design Approach	4
Feature Requirements.....	4
Workflow Changes.....	4
App Changes	5
Admin Changes	5
Areas Impacted.....	5

Application Transfer Design Approach

Transferring an application from the original owner to a new owner will support two iConnect feature requests – 122279 & 127681. At a high level both iConnects have a home office user entering an application in FireLight and the HO user requires the agent to complete the app because of errors or business reasons. Both also require the ability to handle carrier specific logic during the transfer - either sending application info or scrubbing application data.

Feature Requirements

- Ability to turn on this feature within a user group in the Admin tool.
- Ability to transfer an application to a user selected by the Owner within FireLight.
- Ability to transfer an application to a user managed by the Integration Provider. Could require a call to client endpoint to retrieve new owners 1228.
- Application Transfer is available before an application is completed. Basically, if the application can be unlocked then Application Transfer is available.
- Once the application is transferred, the original owner will no longer see the application in their list of applications.
- Once the application is transferred, the new owner will have all rights to the app.
- Allow the integration provider to perform custom tasks when transfer starts and when transfer is completed.
- Provide notification to new owner that an application was transferred to them.
- Provide notification to original owner when the application completes the transfer.
- Append audits to the application to document the transfer of ownership.

Workflow Changes

When editing an application, the Other Actions menu will have a new action called “Transfer Application”. The “Transfer Application” action will only be available when turned on for the users group. Selecting the menu item will start the Transfer process by calling the integration provider. This consists of two calls to the Integration Provider.

The first call gives the integration provider the opportunity to determine the new owner. (Example: The provider could use a DataItem to determine the new Owner, or call a client endpoint to request the new owners 1228.) If the provider does not choose the new owner or is not able to, FireLight displays a dialog to the current FireLight user to select the owner from a list of users in FireLight.

The second call to the integration provider is done when the new owner is selected. Here the provider can handle any custom tasks to be done at the start of the transfer. (Example: The provider can call a client endpoint to notify them of the application transfer)

The transfer of ownership is completed when the new owner navigates to the FireLight home view where their apps are listed. The integration provider is called to perform any custom tasks before the app transfer is completed (Example: The provider could scrub data before the transfer is complete). The new owner is prompted to notify them of the new app(s) transferred to them. The original owner is also notified that the new owner has received the transferred application.

App Changes

The “Other Actions” menu will list a new action called “Transfer Application”.

A new dialog will handle the new Owner Selection.

Admin Changes

The Group profile will have a new option to Allow Transfer Application. This allows enables the “Transfer Application” action in the “Other Actions” menu. The receiving owner’s group does not need this group option turned on.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration	X	Group
- Reports		
- Deployment		
FireLight App		
- Home	X	Prompts to notify new owner
- New Application		
- Edit Application	X	Other Actions menu
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Integration	X	Optionally handle custom tasks during transfer
- PDF Generation		
-		
FireLight Console		
- Windows O/S		
- iOS		