
Reviewer Document Enhancements

FIRELIGHT BASE



Platform

REVIEWER DOCUMENT ENHANCEMENTS

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Insurance Technologies, LLC

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Table of Contents

iConnect Design Approach - Reviewer Document Enhancements.....	4
1 Reviewer Documents will retain information throughout sequential review queues.....	4

iConnect 239185 Design Approach - Reviewer Document Enhancements

Project Overview

Within FireLight today, a user is not able to retain comments within reviewer documents from one queue to another unless a workaround is placed within the Provider. For this enhancement, comments made on any reviewer document will need to be retained throughout each sequential review queue that it is associated with. Even though these comments will still be editable across each queue, the next reviewer will be able to view them within the queue that they are assigned, which allows for a more convenient user experience. Additionally, if an application is rejected, then these reviewer documents will need to be retained, especially if the user would want to recall that rejection. This will be an impact to all users who currently use reviewer documents within all available review queues (Post-Submit Queues, Pre-submit Queues, and automated queues).

Impacts:

Review Queue - mainly Reviewer Documents - any comments added to the reviewer documents will be retained. This will apply to all review queues - Pre-Submit, Post Submit, and Automated queues

1 Reviewer Documents will retain information throughout sequential review queues

Currently in FireLight, a reviewer can review an application within a review queue, fill out the reviewer documents, and approve or reject. If this queue is associated with a sequential review, then this application will move to the next queue, however the comments left in the reviewer documents are not retained from one queue to the next.

In this enhancement, the reviewer's comments that are made within a reviewer document will need to be retained across all of the sequential review queues that this application is associated with. For example, If queue 1 has a reviewer document, and the reviewer adds in the sentence of "This is approved for underwriting", then when this application moves to queue 2, the next reviewer will see "This is approved for underwriting" when opening up the reviewer documents.

The comments from the previous reviewers will be editable, and can be changed if need be (however, these comments can be stored within the Audit report and history utilizing the reviewer comments enhancement within the review queue tab).

If an activity is rejected from the current queue, and gets recalled, the activity will be added back to the queue it was rejected from, but the reviewer documents will still be retained with the previous reviewer comments. If an activity is moved to another queue, even if it would be the previous queue, the reviewer documents will be retained, and the comments from the previous reviewer will also be retained.

Acceptance Criteria

- Reviewer documents within the review queue will be retained when moving to another queue through a sequential review queue script
- This enhancement will also work for manual queue move, and reviewer assignment
- Reviewer documents within the review queue will be retained when rejected, as an activity could possibly be recalled at a later date (prior to purge)
- Reviewer comments within the reviewer documents will be retained across all queues, including but not limited to sequential reviews, queue moves, and activities that are recalled
- Reviewer comments are editable on the reviewer documents throughout each sequential review queue or moved queue
- Reviewer comments can be captured within the audit history and audit report when data items are listed within the reviewer comments section in the review queue admin tab.
- These changes will apply to all types of review queues, including but not limited to Post-Submit Queues, Pre-submit Queues, and automated queues.
- This enhancement will not interfere with the deadline passed functionality