

iConnect 137217 Design Approach for eSignature Signing Sequence

Project Overview

Current functionality allows the signature order to be controlled at the form level, with a form in the package designated as the first or last form in the package to be signed. This functionality would provide another level of control of the signing sequencing by allowing an organization to require the agent to sign first or last in the signing ceremony.

Features/Requirements

- If the Agent Signing Order is set to 'Default', the signing order will be unchanged and the agent can choose whether to sign before or after the client signers
- If the Agent Signing Order is set to 'First', the other signer buttons will be disabled until the agent signer types have completed the signing ceremony.
- If the Agent Signing Order is set to 'Last', the agent signer type buttons will be disabled until the client signer types have completed the signing ceremony.
- If an external signature request is sent out, the signature must be complete before the agent signature button will enable if the Agent Sign Order option is set to 'Last'
- The option to delete a signature and re-sign will still be available, but will maintain the signing order requirements
- In a distributor environment, the session user's organization setting for Agent Sign Order will be used

Use Cases / Workflow Changes

An organization will determine whether the agent signers will be required to sign before the client signers or after the client signers. The option for Agent Sign Order will be selected in the organization tab in the Admin tool.

If the option is set to 'Last', the agent signer button will be disabled until all of the client signers have completed the signing ceremony. In the case of multiple agent signers, all of the agent signer buttons will enable after the last client signer has completed the signing ceremony. The option to delete the client signatures and re-sign will be available until the first agent signature has been completed.

If the option is set to 'First', the client signer buttons will be disabled until the agent signer has completed the signing ceremony. In the case of multiple agent signers, all of the agent signer buttons will be enabled from the onset and the client signer buttons will enable after the last agent signer has completed the signing ceremony. The option to delete the agent signatures and re-sign will be available until the first client signature has been completed.

Admin Changes

- Drop-down menu for Agent Signing Order added to the Organization settings

App Changes

- If the Agent Signing Order is set to first, the other signer buttons will be disabled until the agent signer types have completed the signing ceremony
- If the Agent Signing Order is set to last, the agent signer type buttons will be disabled until the client signer types have completed the signing ceremony
- In the agent sign first workflow, the re-sign option will be available to the agent signer types until the first client has completed signing
- In the agent sign last workflow, the re-sign option will be available to the client signer types until the first agent has completed signing


Integration Changes

None needed.

UI Mock Ups

Admin Tool


Agent signing order drop-down set in the Organization settings screen


Organization Name	Insurance Technologies
Organization Type	Carrier ▼
Country	USA ▼
DTCC Member ID	00012
Full Settling DTCC Member	<input type="checkbox"/>
Company Rating	AAA+
External Map Code	IT
App Signout URL Type	ThankYou ▼
App Site Signout URL	ThankYou
Shared Key	FireLight#123
Support Email	info@go.com
Deployment Notification Email	
Data Partition	ALL
Edit Masks Add	None ▼
Default Validation Placement	Right ▼
 Agent Signing Order	Default ▼


App Portal

With agent signing order set to 'Last', the agent signer button is disabled until the last client signer has completed the signing ceremony

List of Required Signers


Owner


Authorized Depositor


Agent

How to Enable and Use This Feature

1. In the Admin tool, navigate to the Organization tab by clicking on the Profile Administration menu button.
2. Select the desired agent signing order from the Agent Sign Order drop-down menu.
3. In the App Portal, verify the signing order in the 'List of Required Signers' which appears after completing the application and entering into the signing process.
4. Complete the signatures in any signing order, verifying that the client and agent signer buttons enable at the appropriate time according to the Agent Sign Order selected.
5. The option to delete the signature and resign should also maintain the sign order selected for the agent.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		Agent Sign Order option added to organization settings
- Reports		
- Deployment		

FireLight App		
- New Application		
- Edit Application		
- Signature Process		Agent sign order determines the enabling of signer buttons. Sign order should be maintained with the delete/re-sign functionality
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		