

iConnect 128213- Email Notification on E-Signature Decline

Workflow Changes

None

Features/Requirements

Email notification sent on decline of the e-signature process. Additional decline signature template in admin which would allow organizations to update with their own process for obtaining wet signatures before application submission. Option within the admin tool would allow the organization to control this email notification at the group level.

Admin Changes

- Option to 'Enable Decline E-Sign Email' in the group settings tab will allow feature to be turned on/off. Default will be set to not send an email on decline the e-sign process.
- New email template added to the Email tab to allow organizations to insert desired text for the instructions on the wet-signature process before application submission in FireLight.

App Changes


- Auto-generated email sent to agent on click of 'Decline E-Signature' button if the option for 'Enable Decline E-Sign Email' has been checked in the group settings of the admin tool for the logged in user's group.


UI Mock Ups

Admin Tool

Option within groups tab to enable the decline e-sign email

Groups

 Create New



Name ▼	TC Role Code	
BASEIT	External Role Code2	X
Date Override	DO	X
Devel		X
For IT2	IT2Only	X
For IT3	IT3	X
IT UserGroup	IT	X
New User Group		X
Test Group		X

Name:

TC Role Codes:

App Only | **Admin Only** | **Review Queue Only**

☐ Disable View Documents
☐ Disable Save Apps
☐ Disable View Application
☐ Disable View Application Summary
☐ Disable Edit Preferences
☐ Disable Email After Submit
☐ Disable Signing as Client
☐ Disable Signing as Agent
☐ Disable Sign Now
☐ Disable Submit
☐ Disable Signing Until All Pages Viewed
☐ Agent Not Required to View All Pages
☐ Optional Client Email
☐ Allow PassCode Email
☐ Auto-Email PassCode
☐ Enable Quoting

☐ Require Mobile Verification
☐ Disable Editing Other Users' Applications
☐ Enable Use Screen Notification
☐ Enable Test Mode
☐ Enable Override Date
☐ Enable Cc Sender In All Requests
☐ Enable Single User to Sign Multi Signer Types
☐ Require Entry of Application Name
☐ Allow Not In Good Order Submittals
☐ Disable Console For Group
☐ Case Access by Firm ID
☐ Enable Override SSO
☐ Enable User Share
☐ Enable Multi-Life
☐ Enable Use Agent Email
☐ **Enable Decline E-Sign Email**

Product Access | **Case Access** | **Review Queue Access**

Organization:

☐ AA
☐ AA delete me
☐ Abhi Prod
☐ Agency Appt Request
☐ ASD
☐ Corporate Forms
☐ DEL Product
☐ dfgdsgfdsgfdsg
☐ G Delete Me
☐ IMO/Agency Appt Request
☐ IT Annuity Product
☐ IT Multi Signer Product
☐ IT UL DonzQuest
☒ Jennie Rule Test
☐ Jims Test Term Product
☐ Jonathan Test Product
☐ Check/Uncheck All

Declined E-Signature Email Template- can be modified to include custom instructions for obtaining wet signatures before application submission

Email Template

Insurance Technologies

Email Template Type

Declined E-Signature Email Template

Email Template

Dear <AGENT_NAME>,
You have elected to decline E-Signature for the application <APPLICATION_NAME>. Please collect all application signatures manually before submitting the application electronically.

Save Email Template

Application Portal

Trigger for auto-generated declined e-signature email is the button click on 'Decline E-Signature' in the signatures step of the application workflow.

1 FORM ENTRY ✓

2 SIGNATURES

3 REVIEW

4 FINALIZE

Electronic Signatures

This application will be locked upon making these choices. No changes can be made after signing.

✓ Use E-Signature

✗ Decline E-Signature

If you choose to use E-Signature, all signatures in this application will be collected electronically. Please read the Federal Regulations and Definitions. Please make sure all parties are equipped with these system requirements:

- Internet Access
- Minimum Screen Resolution 1024 x 768
- Web browser: Internet Explorer 8+, Firefox 2+, Safari 3+, Google Chrome 14+, iPad iOS 5+, Android OS 2+.
- 128MB of RAM; Cookies and Javascript Enabled.

If you choose to decline E-Signature, all signatures in this application will be collected manually. Your application will be completed in our system. You may print the application PDF files and deliver to your client via postal or other means. Please note that delivery of the information electronically will result in a superior customer experience.

System Area	Yes	Comment
Admin Tool		
▪ Form Library		
▪ Design Forms		
▪ Profile Administration	x	Option to enable email added to Groups tab- App Only Declined E-Signature template added
▪ Reports		
▪ Deployment		
FireLight App		
▪ New Application		
▪ Edit Application		
▪ Signature Process		
▪ Review Queue		
▪ Manual Review		
▪ User Preferences		
▪ Inbound Integration		
▪ Outbound Integration		
▪ PDF Generation		
▪ Other		
FireLight Console		
▪ Windows O/S		
▪ iOS		
▪ Android		
Other Systems		
▪ DTCC Integration		
▪ Commission netting		
▪ Activity Reporting		

Steps for testing:

1. In the Admin tool Organization tab, check option 'Enable Decline E-Sign Email' to turn on auto-generated email for declined e-signature process.
2. Add custom text to the 'Declined E-Signature Email' template in the Profiles/Email tab of the admin tool.
3. In the Application portal, verify email address is entered in preferences screen or, if using 1228 FireLight entry, an email address is sent in for the agent.
4. Create a new application in the app portal and complete the application.
5. Click continue to transition to the signature step of the application workflow.
6. An auto-generated email will be sent to the agent email with instructions for completing the wet-signature process before electronically submitting the application.