

iConnect 135628 Design Approach- Delayed Use of 103 Client Data

Project Overview

Ability to SSO into the FireLight system with a 103 and launch into the Home page. When a new application is created, then have the ability to use the client data posted over in the 103 during that session.

Features/Requirements

- Allow a 103 to post-over into FireLight without containing a product ID and jurisdiction ID
- Without a product and jurisdiction ID in the 103, the user is brought to the FireLight Home page
- Client data in the posted over 103 can be used for any applications created during that session
- User will be asked at the time of application creation if they would like to use the information for the insured or annuitant party from the current session's 103
- If user opts to use session data, the associated fields will pre-fill on the forms
- The system will store the data for the current session's 103 post-over and will be overwritten when the user posts over in a future session
- Delayed 103 will be available for the following single sign on methods: New Business, IDP-Initiated SSO or AltNewBusiness

Use Cases / Workflow Changes

User enters FireLight through a CRM system. The client data associated with the individual selected in the CRM is posted over to FireLight through a 103. If the 103 does not contain a product ID or jurisdiction ID, the user is launched into the FireLight Home page. When the user selects the product and jurisdiction, the system will allow the user to choose whether to use the data from the 103 for the application being created. The checkbox for 'Create the Application for [Insured Name] or [Annuitant Name]' will default to checked. If the user does not uncheck the box, the associated fields on the forms are pre-filled with the data from the current session's 103. The 103 client information can continue to be used for duration of the session for any applications created.

Admin Changes

None needed

App Changes

- Allow 103 to post over without product and jurisdiction information
- If 103 does not contain the product ID and jurisdiction ID, launch into Home page rather than new application or existing application
- Checkbox on the form selection screen will allow the user to select whether they would like to create an application for the insured or annuitant name. The checkbox will default to checked.
- If user keeps the checkbox checked, the application will pre-fill with any information mapped from the retained 103

Integration Changes

No changes needed

UI Mock Ups

Required Forms

☒ DIDon2007

☒ AllocationTotal


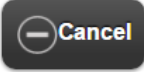
Optional Forms


☐ 5 - EEO Employee Self-Identification Survey Employee Self-Identification Survey

☐ financial affidavit revised 2014

Add any optional forms, then click 'Create Application' to proceed.

☒ Create the application for John Smith



How to Enable and Use This Feature

- Create ACORD TX103 request without the jurisdiction and product ID (see documentation “FireLight Single Sign On Methods”)
- Enter FireLight through Single Sign on method using New Business, IDP-Initiated SSO or AltNewBusiness

- On main FireLight dashboard, select New Application and choose the jurisdiction and product type from the drop down menus. If applicable, select the carrier. Then choose the application package.
- Once the application is created on the form selection screen, a dialog pop-up will allow you to choose whether the 103 information should be used.
- If ok is selected, verify that the application has been named appropriately and the data sent over has pre-filled the application fields.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		
- Reports		
- Deployment		
FireLight App		
- New Application		Checkbox option to use delayed 103 post
- Edit Application		Pre-filled data items from the 103 post
- Signature Process		
- 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		