



iConnect 134978 Design Approach for Signing Ceremony Form

Project Overview

Provide a document type for Signing Ceremony Only form which will allow a form to be presented during the signing ceremony without having a signature control on the form.

Features/Requirements

- Document type will be selected in the Packages tab of the Admin tool allowing user to designate a form as 'Signing Ceremony Only' in the package
- 'Signing Ceremony Only' form will not be visible in the edit application process nor be submitted as part of the application
- The form will be visible in the 'Display/Print PDF' view in the App Portal as an optional print item
- During the signing ceremony, the form will display as part of the form acknowledgement for each signer
- The placement of the form in the form acknowledgement will be based on the position of the form in the package within the Admin Tool's Packages tab

Use Cases / Workflow Changes

The 'Signing Ceremony Only' form allows organizations to present necessary disclosures to clients that do not require a signature but must be presented at the time of signing. When creating the package in the Admin Tool, the form would be added to the package and the document type of 'Signing Ceremony Only' selected from the document type drop down. The form would be presented to each signer during the form acknowledgement stage of the signing process along with forms requiring signatures.

Admin Changes

Document type 'Signing Ceremony Only' added to the document type drop down of the Forms in Package section on the Packages tab.

App Changes

Documents with the document type of 'Signing Ceremony Only' will be added to the print list in the 'Display/Print PDF' view. The form will display for all signers during the form acknowledgement stage of the signing process. It will not display as part of the application during the edit application stage. It will also be excluded from back office processing.

Integration Changes

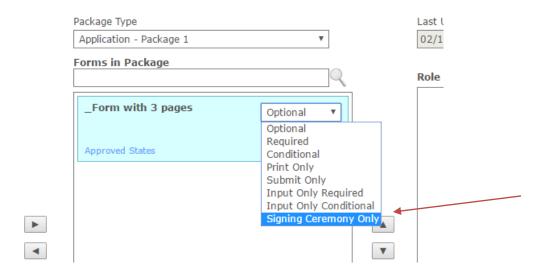
None needed



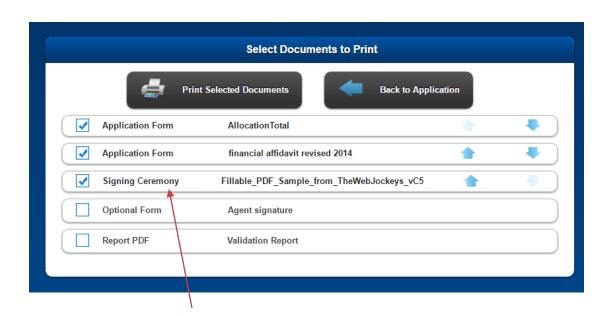


UI Mock Ups

Admin Tool- Packages Tab



App Portal- Display/Print PDF







App Portal- Form Acknowledgement in Signing Ceremony



How to Enable and Use This Feature

- In Admin Tool in the Packages tab, add form to package and select 'Signing Ceremony Only' from the document type drop-down
- In App Portal, create an application- verify the form is not listed as optional in the list of forms for application
- In edit application process, verify the 'Signing Ceremony Only' form is not visible in menu list of forms or in the application view
- Click Other Actions/Display/Print PDF. The 'Signing Ceremony Only' form should appear in list of forms to be selected for print with the document type listed to the left

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		Addition to document type drop-down in Package Forms





- Reports	
- Deployment	
FireLight App	
- New Application	
- Edit Application	Visibility of Signing Ceremony Only forms hidden
- Signature Process	Addition of Signing Ceremony Only forms to the form acknowledgement without signature controls
- Review Queue	
- Manual Review	
- User Preferences	
- Inbound Integration	
- Outbound Integration	
- PDF Generation	Addition of Signing Ceremony Only forms to the Display/Print PDF form list as optional print
- Email System	
FireLight Console	
- Windows	
- iOS	
Other Systems	
- DTCC Integration	
- Commission Netting	
- Activity Reporting	