INSURANCE TECHNOLOGIES

Ability to assign Reviewers to specific Activities within the Review Queue

FIRELIGHT BASE

FireLight®

Platform

INSURANCETECHNOLOGIES.COM

Insurance Technologies, LLC

Insurance Technologies, LLC
Two South Cascade Avenue
Colorado Springs, CO 80903
USA
Phone: 719.442.6400
FAX: 719.442.0600

Internet E-Mail: info@insurancetechnologies.com
Website: http://www.insurancetechnologies.com

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Design Approach iConnect 223534 & 220027 - Ability to assign Reviewers to specific Activities within the Review Queue

An enhancement needs to be added in order to allow certain activities to be added to a specific reviewer within the review queue. This process needs to have the option of being both a manual (adding applications to a specific reviewer in a manual process), and automatic (adding applications to the queue for a specific reviewer in an automatic process).

Along with this process, we'll need to send an email to the specific reviewer (and have the option to add any other email addresses as necessary) both when the application is ready for review, and also when it has been reviewed, and a final decision has been made (approved, rejected) and submitted to the carrier.

Impacts:

The Post-Submit and Automatic Review Queues only

Review queue script - adding a new rule node

Review queue group settings

Review Queue Email templates

Review Queue UI - adding a new button and changing status verbiage

Review Queue Report

Review queue Audit history and audit report - specifically the review queue section

1 Admin Changes to create the ability for reviewers to be assigned specific activities

1.1 Review Queue Script will allow new rule nodes associated with reviewer ID

A new attribute will need to be created in order to assign a reviewer using the review queue script.

The following attribute will be added:

-reviewerid - This will be associated to the reviewer's company producer ID/External map code

An example of this script is below:

```
<if>
 <condition>
   <qisstart />
   <compare op='=='>
     <diget dataitemid='FLI_PRODUCT_TYPE' />
     <const value='Life' />
   </compare>
 </condition>
 <setqincluded reviewerid="ABC123">

  <qid name="1" />
  <const value="true" />
 </setqincluded>
</if>
```

If an application doesn't need to be assigned to a reviewer, the new "reviewerid" section will be left out of the script.

```
<if>
 <condition>
   <qisstart />
   <compare op='=='>
     <diget dataitemid='FLI_PRODUCT_TYPE' />
     <const value='Life' />
   </compare>
 </condition>
 <setqincluded>
  <qid name="1" />
```

```
    <const value="true" />
  </setqincluded>
</if>
```

Acceptance Criteria

- A new attribute "reviewerid" will assign a reviewer to a specific application, product, or type.
- If "reviewerid" is not present, the script will use existing functionality meaning no automatic assignment will occur.
- This feature is only available for Post-submit and automated review queues.
- In an automated review queue, the assigned person will always show as "Backoffice" and not a specific assigned person.
- If a person gets assigned to an automated review queue, existing functionality with automated queues will override this automatic assignment.
- In Deadline Date passed, the action (approved or rejected) will show from "DeadlinedPassed" and not a specific assigned person
- The reviewer will have to have already logged into Firelight in order for this assignment to occur

1.2   Add Email Template for Assigning Activities for review to a specific person

A new email template needs to be created for when an application is assigned to a specific reviewer.

<QUEUE_NAME> - Name of Queue

<REVIEWER_NAME> - pulled from the system user

<REVIEWER_ID> - external map code

The email template will be housed in the "Review Queue" email category, and will be called "Post-Submit Review Queue Request (Assigned Reviewer)", and will say the following,"

Description

Subject: A New Case has been Assigned

Dear Reviewer,

The following case <CASE_NAME>, has been auto-assigned to <QUEUE_NAME> for <REVIEWER_NAME>, and is now available for review on queue. Please login to FireLight at your earliest convenience to review.

Acceptance Criteria

- "Post-Submit Review Queue Request (Assigned Reviewer)" will be visible to the user within the admin tool
- The "Post-Submit Review Queue Request (Assigned Reviewer) subject will be: A New Case has been Assigned
- The "Post-Submit Review Queue Request (Assigned Reviewer) will state: "Dear Reviewer, The following case <CASE_NAME>, has been auto-assigned to <QUEUE_NAME> for <REVIEWER_NAME>, and is now available for review on queue. Please login to FireLight at your earliest convenience to review."
- This email will only be utilized when a reviewer has been assigned to an activity for review
- Auto-assignment can only apply to post-submit or automatic queues. Pre-submit does not apply to this enhancement.

1.3   Email notifications need to be sent out to Reviewer

An email will be sent to this particular reviewer once it has been assigned, to notify them it is ready for review. Another email will be sent when the review has been completed.

This notification will go to the reviewer upon submission of the application - by selecting the submit button, the system will detect if an email address has been added in the general section of the Preferences section and if so, it will execute.

My Preferences

General

User Full Name	Julie Henry	☑ **Send Message Center Emails**
User Email Address	jhenry@insurancetechnologies.com	☑ **Use Agent Email for All Communications**
Default Jurisdiction	Select Jurisdiction	
Default Product Type	Life	
Default Time Zone	EST - Eastern Standard Time	
Locale	English	
Page Size for My App. List	10	

The review queue script checks to see that this application is being added to a review queue, as well as it is being assigned to a reviewer, and will send an email with the email address provided within the preferences section.

If the application is being moved to a reviewer through the UI button, this button will not only move the application to the specific reviewer, but will also send an email (which will be captured within the Preferences section) to the email address listed for that reviewer.

Also, an email will need to be sent to any email address that is listed within the Email group textbox within the Review Queue tab in the Admin tool. If an email address has been added to this textbox, the same email that is being sent to reviewers will be sent to this email address. This will be regardless if an email is being sent to a reviewer email.

Queue Name	Failed Lexis Nexis Authentication
Queue Number	2
Email Group	kdease@insurancetechnologies.com
Remarks	
Additional Info	
Last Updated	6/15/2020 5:20 PM UTC

Acceptance Criteria

- Email notifications will be sent to a specific reviewer upon selecting initial submit (prior to callbeforeosj) and/or the "Assign to Reviewer" button within the UI
- An email address has to be entered in the General section of the Preferences Section for the reviewer to receive an email
- The Preferences section email address can also be prefilled from any information coming from the 1228
- An email notification will also be sent to any email listed within the email group textbox of the review queue tab in the admin tool, regardless if an email is being sent to a reviewer.

1.4 Automatically change status from "Pending Review" to "In Review" for locked cases

The Display statuses will need to change from "Pending Review" to "In Review" when a case has been locked and assigned to a specific reviewer. This will need to be changed when either an activity is automatically assigned to a reviewer (through the review Queue script), or manually assigned (using the re-assign reviewer dropdown)
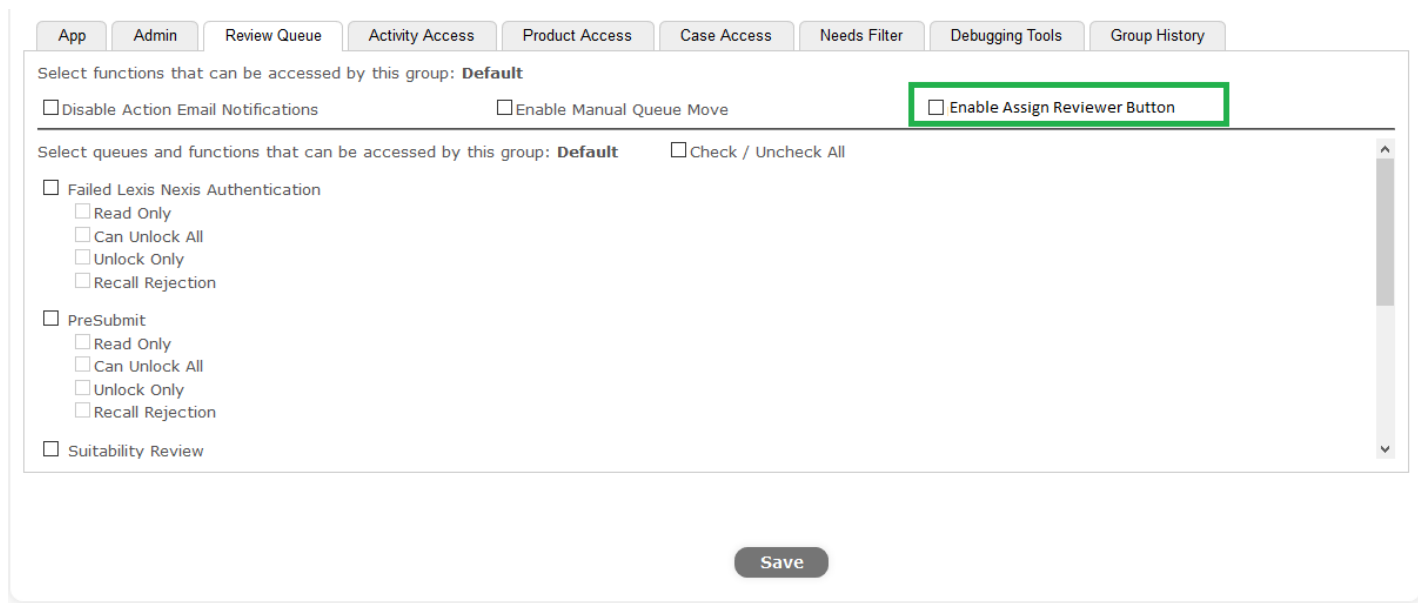
Acceptance Criteria

- When an activity is assigned (either automatic or manual) and is locked down, the activity will be moved from "Pending Review" to "In Review" automatically.

1.5 Add an "Enable Assign Reviewer Button" in Review Queue Group Settings

The "Assign Reviewer" dropdown and button will only need to show if it is enabled to do so within the groups settings in the admin tool. Under the Review Queue tab in the Groups Settings, we need to add "Enable Assign Reviewer Button".

This feature will be a global setting, in that it will not be configured per review queue.

**Please note, the Enable Assign Reviewer Button will only control the ability to manually assign the reviewer.

The script will use the logic where if the ReviewerID is present, FL will assign the reviewer regardless of this button being active. These are separate actions.

Acceptance Criteria

- "Enable Assign Reviewer Button" will be a global setting in the Review Queue Tab under Groups Settings
- Selecting "Enable Assign Reviewer Button" will make the Assign Reviewer button and Dropdown visible within the review queues
- "Enable Assign Reviewer Button" will be based on role code, and not configurable among specific review queues.
- The Auto-Assignment of a reviewer is dependent on the review queue script alone, and will still run if a ReviewerID is listed. It is not dependent on this functionality.

1.6   Audit: Need to capture the assignment of a specific Reviewer

Within the Review Queue Audit History, and the Audit Report, we'll need to capture the information surrounding assigning a specific reviewer.

This call will show the timestamp as well as the following message "{1} was locked and auto-assigned to {2} in review queue {3}."

The {1} represents the Application Name, the {2} represents the Reviewer's Name, and the {3} will represent which Queue this application is in. This message can change as many times as a case is assigned to a new reviewer, or if it is moved to a new queue and assigned to reviewer. The {2} can also reflect if it is unassigned, and if it is, will just say "Unassigned" in the message.

ex: NEW APPLICATION - Judy Smith Case was locked and auto-assigned to Julie Henry in queue Suitability Review"

We'll also need to make sure that the session user and status of the application is captured with this message as well.

The Session User will be

Manually assigned cases will show the session user that manually assigned the case

Auto assigned via the script will show "Backoffice assigned"

Review Queue History:

New Application - Lifetime Income - Queue History

Suitability Review

Status as of 9/12/2020 12:58:13 PM EDT: Approved
HISTORY:

Approved 09/12/2020 12:58:13 PM EDT	User Name: Julie Henry Remarks: A revew Queue Approval email was sent to Julie Henry
Approved 09/12/2020 12:58:11 PM EDT	User Name: Julie Henry Remarks: This application has been processed and approved by the reviewer [Julie Henry] and has been released to the carrier. Please contact the carrier if you have any further questions about the staus of this application
Lock 9/11/2020 02:48:30 PM EDT	User Name: Back Office Assigned Remarks: 'New Application - Lifetime Income' was locked and auto-assigned to 'Julie Henry' in review queue 'Suitability Review'
AutoAdded 9/11/2020 02:48:30 PM EDT	User Name: Back Office Remarks: Notification of application 'New Application - Lifetime Income' added to 'Suitability Review' reivew queue sent to 'jhenry@insurancetechnologies.com
AutoAdded 9/11/2020 02:48:30 PM EDT	User Name: Back Office Remarks: Auto Added to Queue

Audit History:

FireLight Packet Audit Report

Review Queue Activity Audit - 28b7b50c-0348-4e14-b0b3-56bc4222ff4c		
Timestamp (UTC)	**Session User**	**Audit Message**
9/11/2020 18:48		Auto Added to Queue
9/11/2020 18:48		Notification of application 'New Application - Lifetime Income ' added to 'Suitability Review' review queue sent to 'kdease@InsuranceTechnologies.com'.
9/11/2020 18:49	Julie_FLADEMO	Locked for Review
9/11/2020 18:49	**Back Office Assigned**	**New Application - Lifetime Income' was locked and auto-assigned to 'Julie Henry' in review queue 'Suitability Review'**
9/11/2020 18:49	Julie_FLADEMO	This application has been processed and approved by the reviewer [Julie_FLADEMO] and has been released to the carrier. Please contact the carrier if you have any further questions about the status of this application.
9/11/2020 18:49	Julie_FLADEMO	A review queue approval email was sent to Julie_FLADEMO.

Acceptance Criteria

- Review Queue audit history and audit report will contain a new message "{1} was locked and auto-assigned to {2} in review queue {3}."
- The {1} represents the Application Name
- The {2} represents the Reviewer's Name
- The {3} represents the Queue
- Unassigned Reviewers will also be listed in the {2} section if left unassigned
- The audit message will be created when a case is assigned through the UI
- The audit message will be created when a case is assigned through the review queue script
- Session user and Status will also need to be captured when this message is created

1.7   Audit: "Pending Review" to "In Review" status change needs to be captured- Verify

When "Pending Review" gets automatically changed to "In Review", the status change - "Locked for Review" - will need to be captured within the review queue audit history and the audit report.   Along with the existing message, the session user, and timestamp will need to be collected.

If a reviewer is changed at any point, this message will be captured again.

Review Queue Activity Audit – 29c073d2-0b22-4a93-893a-2ad426f85cc6		
Timestamp (UTC)	**Session User**	**Audit Message**
5/14/2020 17:06	Backoffice User	Auto Added to Queue
5/14/2020 17:06	Backoffic User	Locked for Review

Acceptance Criteria

- "Locked for Review" will need to be captured within the audit history and audit report when the display status is changed from "Pending Review" to "In Review"
- This message will display as many times as this locking action occurs

1.8   Audit: Need to capture when an email was sent to a specific reviewer

In Firelight today, we capture the following audit for email notifications, "Notification of application '{1} ' added to '{2}' review queue sent to {3}.

The {1} is the application name

The {2} is the Review Queue Name

The {3} is the email address that the notification was sent to.

We'll want to leverage this existing audit for the email notifications being sent to the assigned reviewer. The only change is that along with sending an email to the address within the Preferences section, we'll also want to include any email address that is in the email group section of the Review Queue tab in the admin tool.

Acceptance Criteria

- A new audit for the email notification will be added to the audit history and audit report.
- We'll leverage the existing email notification audit

1.9   Report: Alter Review Queue report to add in Specific Reviewers

The Review Queue Report will need to be altered to add in an additional columns for specific reviewers. This information will be in between the existing columns of "Current Queue" and "# of Days in Current Queue"

The additional columns needed are:

-Reviewer Name

-Reviewer Map Code

We will need to capture both the Assigned reviewer, and also an unassigned reviewer if the application has not been assigned.

Review Queue Report

Date	Product	Agent	Owner	Current Queue	Reviewer Name	Reviewer ID	# of Days in Current Queue	# of Days in Review Queue
5/15/2017	IT Annuity Product	IT TESTER FULLNAME	n	50	Julie Henry	Julie_IT	122	122
5/15/2017	IT Annuity Product	IT TESTER FULLNAME	j	50	Julie Henry	Julie_IT	122	122
6/26/2017	IT Annuity Product	IT	j	50	Julie Henry	Julie_IT	80	80
7/12/2017	IT Annuity Product	IT	j	50	Unassigned	Unassigned	64	64
8/9/2017	IT Annuity Product	IT	gfd	50	Unassigned	Unassigned	36	36
								Total Submissions in '50' Queue:5

Acceptance Criteria

- The Review Queue report will show a new column titled "Reviewer" which will show the reviewer's name
- The Review Queue report will show a new column titled "Reviewer ID" which will show the reviewer's map code
- If a case has not been specifically assigned to a reviewer, then "Unassigned" will display in the reviewer column
- "Unassigned" will show in both the Reviewer Name and Reviewer ID if an application hasn't been assigned.
- Send sample of report to PO

2 App changes to create the ability for reviewers to be assigned specific activities

2.1 Default Activities to be shown in "My Locked Orders" if assigned to a reviewer

We need to tie the existing "My Locked Orders" functionality to using the Company Producer ID/External Map code to associate a reviewer to specific cases.

When an existing reviewer comes into the review queue within Firelight, they will be presented with the queue, but will only see the cases that have been assigned to them or they have locked themselves. The "My Locked Orders" will be the default setting, and the cases that have been assigned to this reviewer will be the only ones displayed.
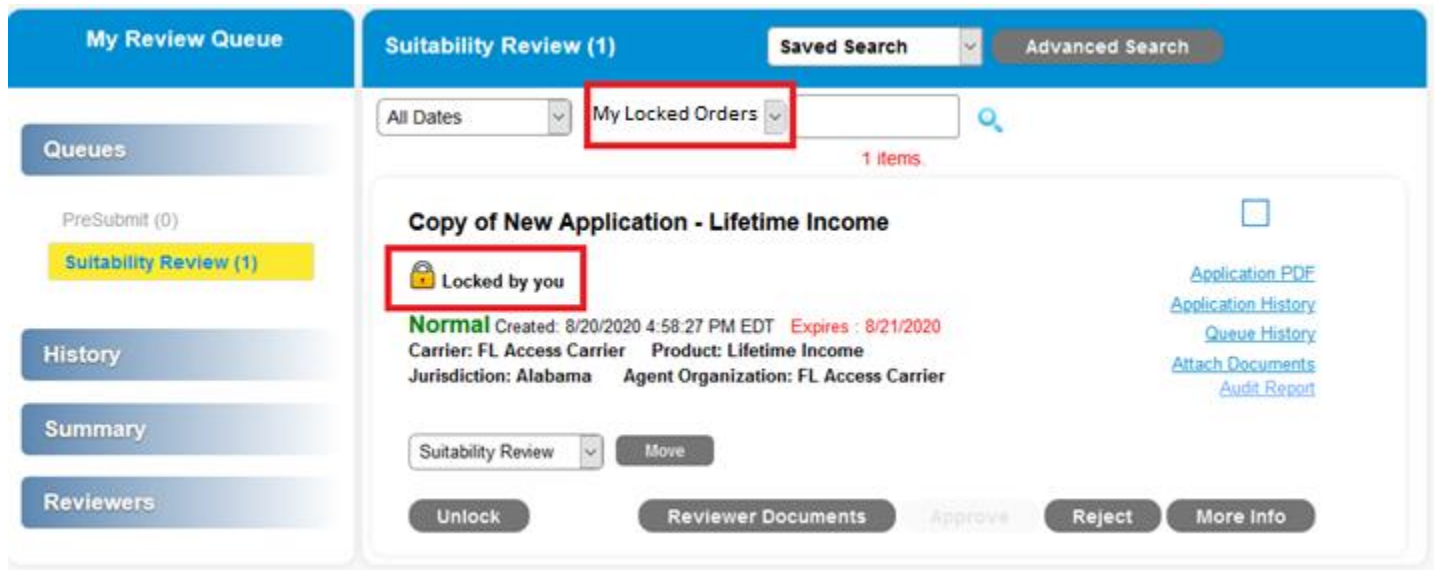
Acceptance Criteria

- When an existing reviewer has a company producer ID associated with their login, they will come into the review queue to see only the cases that are assigned to them.
- "My Locked Orders" will be the default setting for existing reviewers
- The Status dropdown will not be locked down, and the reviewer will be able to select other statuses
- Existing functionality for the Status filtering will not change

2.2   Change "Locked by Me" verbiage to "My Locked Orders" verbiage

The Verbiage "Locked by Me" will need to be changed to "My Locked orders". This is just a verbiage change, and will not change existing functionality

Acceptance Criteria

- "Locked By Me" will change to "My Locked Orders" and will be visible within the __ dropdown

2.3   Add "Assign Reviewer" dropdown within the Queue

Need to add a second dropdown next to the "Manual Queue Move" that will allow an application to be assigned to another reviewer.
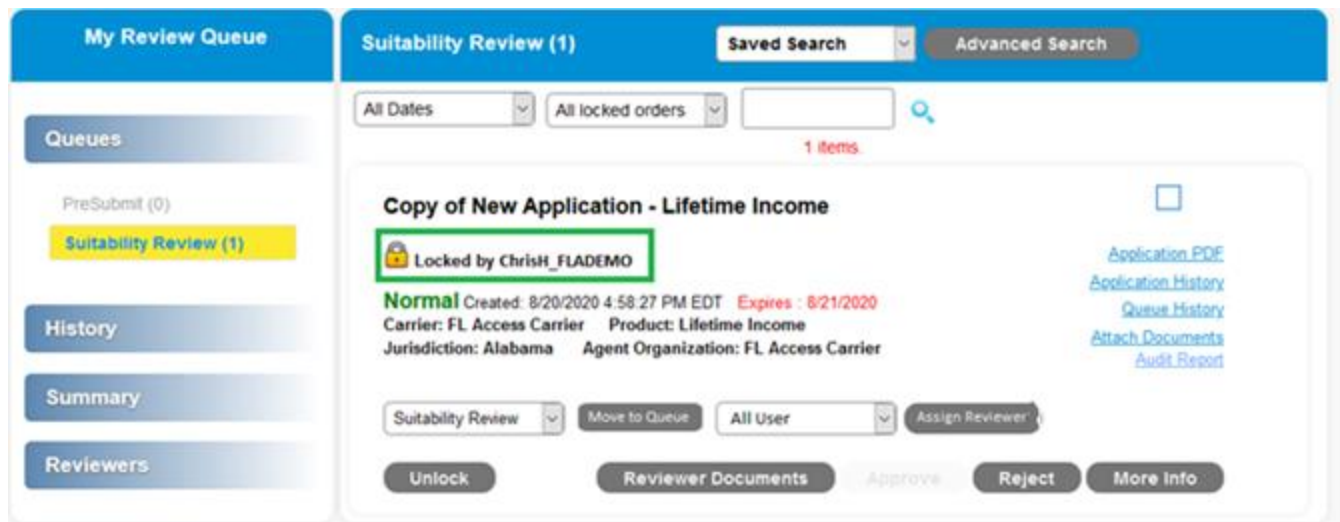
This dropdown will be associated with all of the reviewers (users) within this review queue. The default setting that will display will be "All User".

ex: If there are 8 reviewers, and 4 had access to review queue 1, and 4 had access to review queue 2, then if we were in RQ1, the dropdown would only show the 4 assigned to that queue.
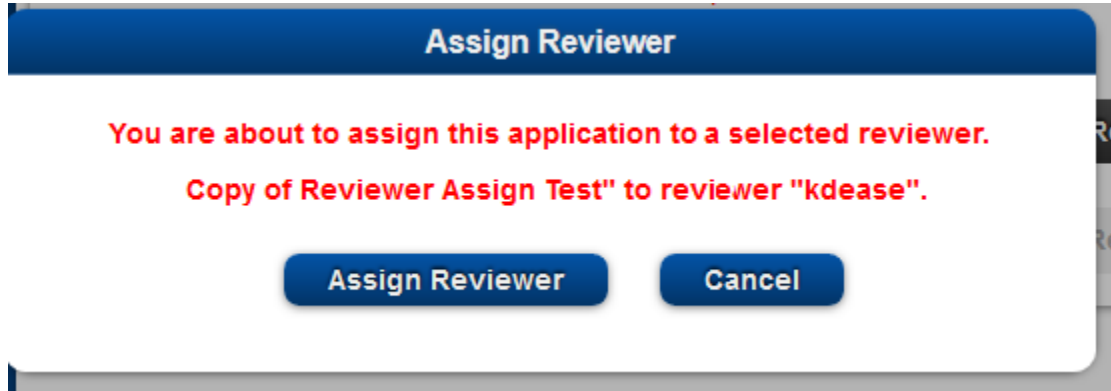
Once a name has been selected, the user can then click a button called "Assign Reviewer".

This case will then display that the case is "Locked by (Reviewer's name)"

When the "Assign Reviewer" is selected, a pop up will show letting the user know they are about to transfer this case. It should say "You are about to assign this application to a selected reviewer."Application Name" to reviewer "Reviewer Name"
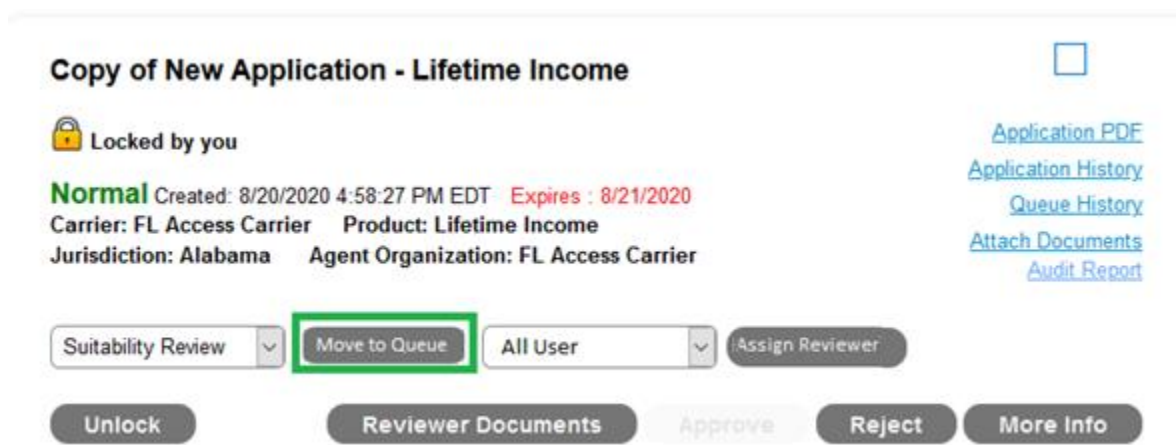

Acceptance Criteria

- A new dropdown will be associated to the users of the review queue. The default verbiage will be "All User"
- If dropdown is selected, it will display only the users that have access to that particular review queue.

- Once a name is selected within the dropdown, the "Assign Reviewer" button is selected, and will transfer the application to that specific user
- A pop up will show letting the user know this case is being transferred to a new reviewer. It will say "You are about to assign this application to a selected reviewer. "Application Name" to reviewer "Reviewer Name"
- The application will list "Locked by (Reviewer's name)" within the "All Locked Orders" tab
- A reviewer that has access to this dropdown will need to have the application locked to be able to assign or re-assign an application to another reviewer.

2.4 Change "Move" button to "Move to Queue"

To reduce any confusion a user may have with the current "Move" button, the current Manual Queue Move button needs to be changed from "Move" to "Move to Queue". This gives additional detail as to what this action is doing.

Acceptance Criteria

- The current "Move" verbiage will change to "Move to Queue"
- Current functionality associated with the "Move" button will not change

2.5 Change "All Status" to "All Statuses" in search

Within the Review Queue Status, The Status dropdown needs to say "All Statuses" instead of "All Status". This is in both the Search Status and the All Activity Status.

3