IMPORTANT: ACTION REQUIRED

The following requires action from all clients. Please read and follow the steps at the end of this message regardless of whether or not you intend to use the new functionality introduced in 2.17 in your environment.

With the 2.17 release, FireLight® will be introducing an enhanced Multi-Sign process. This process will allow individuals that are fulfilling multiple roles relative to an application to sign for all roles simultaneously.
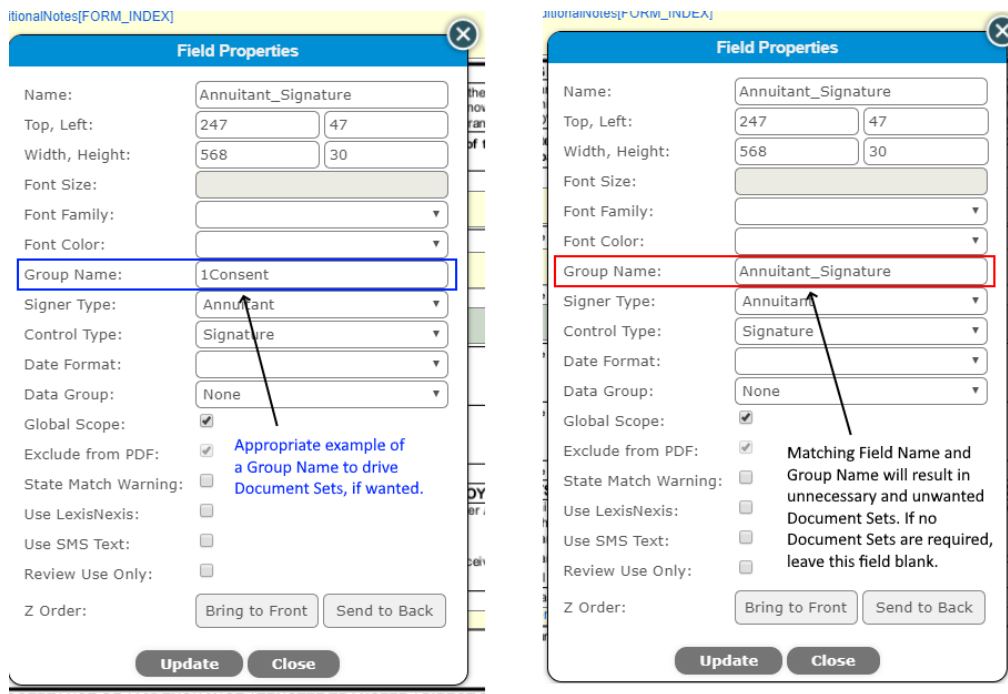

It provides individuals the ability to review all associated documentation for every role in one process and allows them to apply one signature to all necessary forms. In addition, email communication will be consolidated into a single email for the remote signing process (Send Email Request) and one consolidated email will be sent for delivery of documents after submission. We expect this functionality to be widely used as it does create a very clean and simple process for the consumer.

Group Name Impact

In testing this new functionality, we were able to identify some changes to the signing ceremonies being driven by naming conventions in the "Group Name" field of signature controls. The Group Name field drives what we refer to as Document Sets. Document Sets are used when a signing process needs to be separated into separate and sequential document review and signatures. As an example, a firm may require the review and signature first on the E-Consent form and then separately on the application. By setting the Group Name field of all signature controls on the E-Consent form and the application form, FireLight will break out the document review and signatures into Document sets. FireLight will arrange the document sets first by number and then alphabetically so, to review the consent form first, the Group Name is set to "1Consent" and the Group Name fields for the forms in the application package are set to "Application". Doing this, FireLight will lead the signer through two separate signing processes; starting with the E-Consent form and followed by the Application.

For firms that do not require separate and sequential signing processes (Document Sets), Group Name fields are not necessary. And, the presence of the Group Name can create multiple document sets when they are not actually required. Incorrectly, we have found many situations where the naming conventions used for the Group Name is specific to signer role. If that is consistent among distributors and carriers, you may not have seen an impact as most signing processes are for individual roles. With the introduction of Multi-Sign, the variations of Group Name will create multiple document sets and negate the benefit that Multi-Sign is intended to deliver. To prevent this negative experience, there is action required for all clients prior to the 2.17 release scheduled for 5/22/20.

Action Required

Action Required depends on your requirement regarding Document Sets.

- Does your organization require Document Set functionality to drive separate and sequential signing ceremonies?
    - If "NO" – we will run a script against all your signature fields to clear the Group Name field in your environment. We will run this script first in UAT Next for your testing, but it will also be run as part of the production conversion script on 5/22 in UAT for smoke testing and then in Staging and Production. Again, Group Name for signature controls serves no other purpose than to drive Document Sets. If you don't use Document Sets, the clearing of the Group Name field will have no negative impact to your implementation. We have already tested this script alongside several client in their QE environments with no negative results.

- If "YES" – Let us know and we will provide a listing of all signature controls in your environment to assist in identifying any extraneous Group Names that may drive undesired Document Sets. **Note:** Null (e.g. empty Group Name) is a valid value in the Group Name field and would drive its own document set.

We need all clients to take the following steps to help us resolve this issue prior to the 2.17 release.

Script: the FireLight team will run a script rather than deploying updates To ensure the changes are applied to distributors and carriers and to avoid impacts to your current form/wizard and product testing, we will run the script for clients. By doing this through a script, we can drive the change from our end without requiring you to interrupt your development efforts.

- By running a script to accomplish this, we can complete the task for carriers and distributors in a single step
  - The script that we run will exclude those organizations that do use document sets. As such, there will be no change from your expected signing process.

What is required of you?

Insurance Technologies will be testing first in QE Next and QE. After we have tested there and are satisfied with the results, we will apply the script to the UAT Next environment. This is where we will need your assistance in verifying that the signing ceremony is behaving as expected.

- TESTING
  - Carriers: We will ask that you test your signing ceremony in your own environment. We would also encourage you to use the "Carrier Testing as a Distributor" functionality as well.
  - Distributors: Please test in your environment with several different carriers.
    - If you have a requirement that the signing ceremonies be separate and sequential between Carrier and Distributor forms, please reach out to us to discuss.

Going Forward

In your ongoing form development, discontinue tagging the Group Name field of signature controls unless you specifically intend to drive separate Document Sets. Thank you for your prompt attention to this matter.