
Improve Signature/Review process when individual has
multiple roles

FIRELIGHT BASE

FireLight®

Platform

**IMPROVE SIGNATURE/REVIEW PROCESS WHEN INDIVIDUAL HAS MULTIPLE
ROLES**

Document Version: 1.x

Published: February 20, 2020

Insurance Technologies, LLC

Copyright © 2020 Insurance Technologies, LLC, all rights reserved.

Insurance Technologies, ForeSight® and FireLight® are registered or unregistered trademarks of Insurance Technologies, LLC (IT) in the USA and/or other countries.

ACORD, ACORD ObjX, ACORD OLifE, AL3, ACORD Advantage, ACORD XML, and "Association for Cooperative Operations Research and Development" are registered or unregistered trademarks of ACORD Corporation in the USA and/or other countries.

Microsoft, Microsoft SQL Server, Microsoft Internet Information Server, Windows, and other Microsoft names and logos are either registered or unregistered trademarks of Microsoft Corporation in the U.S.A. and/or other countries.

All other trademarks are the property of their respective owners.

The information contained in this document is current as of the date of the publication. Because Insurance Technologies, LLC must respond to changing market conditions and technology advances, Insurance Technologies, LLC cannot guarantee the accuracy of any information presented after the date of publication.

INSURANCE TECHNOLOGIES, LLC MAKES NO WARRANTIES, EXPRESSED OR IMPLIED, IN THIS DOCUMENT AND HEREBY DISCLAIMS ANY AND ALL SUCH WARRANTIES.

The material contained in this document is considered confidential and the intellectual property of Insurance Technologies, LLC. The recipient is given access to this material on the condition that the recipient (1) will keep the information confidential at all times, and (2) will not copy or modify or share the materials, except as expressly authorized by Insurance Technologies, LLC. The recipient should limit its disclosure of the information and materials only to its employees who have a clear business purpose and need to receive such information and materials and who are bound by confidentiality obligations to the recipient that are at least as protective of such information and materials as those contained herein.

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>

Table of Contents

iConnect Design Approach - Improve Signature/Review process when individual has multiple roles.....	4
1 Review a form one time if multiple roles are the same person	5
2 Disclosure and Labeling to ensure which roles are being signed for	6
3 Audit reports/History.....	8
4 Create Replacement text on Downloaded Completed Application email	10
5 Confirmation emails.....	11
6 Verify Enable Single User to Sign multi Signer Types is enabled	12
7 Ensure all enhancements to the Multi-Sign are updated in the Tele-Sign process	13

iConnect Design Approach - Improve Signature/Review process when individual has multiple roles

Project Overview

An Enhancement to improve the Signature/Review process when an individual has multiple roles is needed. With this enhancement, multiple changes will need to occur. The application itself will need to allow for one signing if the user is defined to have multiple roles. Currently in Firelight, if the user has more than one role they are asked to review and acknowledge multiple times. This will need to change to have the user view the Application ONE time for all roles.

*Throughout the signing disclosure/labeling process of the application we will need to ensure that the user is clearly presented which roles they will be signing for that is relative to the application.

*Secondly, a consolidation of emails that are generated throughout the signing process will be needed. Multiple emails are currently generated based on the number of roles found. We will need to consolidate this email down to one if the user has multiple roles. This email should still contain ONE link for the user to access the application.

The Application Audit report will also need to convey that the user is signing once for multiple roles. This is to ensure accuracy in all application audit reports that will be run.

Impacts:

- E-Signature - allowing multiple roles to be signed for one person when using the "Enable single user to sign multi-signer types"
- Signing review - consolidate the review process so that the multiple roles will be combined into 1 review and signing workflow.
- Screen labels during esign - The screens and audit will be labeled to represent the multiple roles.
- Emails - emails will be consolidated into one email when multiple roles are selected. This email will contain ONE link for the user to access the application.
- Application Audit report - all multiple roles will be listed for the signer

1 Review a form one time if multiple roles are the same person

When multi-sign is selected in the app we will want the user to review each form only one time. For example, if the Owner and the Payor are being signed by the same person then Firelight will only have them review a form with both signatures one time.

Example of both roles, Owner and Payor to be reviewed at one time instead of separately.



**INSURANCE
TECHNOLOGIES**

Demo Access Authorization

Name: _____

Company: _____

Company Address: _____

Company Telephone # _____

Requested By: _____ **Date of Request:** _____

User Name (first initial, last name i.e., "fdennis"): _____

User Password (Specified by Network Services): _____

ACCESS AREA NEEDED:

Demo Name: _____

Owner SIGNING HERE

Duration of Access:

☐ 30 Days
 ☐ 60 Days
 ☐ 90 Days
 ☐ Other

Signatures:

Authorization Approval (Sign and Print Name) _____

Payor SIGNING HERE

Network Services Approval _____

Date: _____

Owner SIGNING HERE

Date: _____

Acceptance Criteria

- User will only review the form once if they are the same person and have multiple roles (ex. Owner and Payor)



2 Disclosure and Labeling to ensure which roles are being signed for

Through disclosure/labeling in the signature process, the individual signing will know what roles they are signing for relative to the application. The user will be presented with what roles they have signed for during the signing ceremony process.

1 DATA ENTRY
2 **SIGNATURES**
3 REVIEW
4 FINALIZE

Client Signature Choice for Owner/Payor : Chris

Please indicate below the method you would like to use to obtain the client signature.



1 DATA ENTRY
2 **SIGNATURES**
3 REVIEW
4 FINALIZE

Agent Identification Verification

Agent ID: 00000000-0000-0000-0000-0000

Owner/Payor : Chris - Client Identification Verification

Form of Identification: Drivers License
ID Issue Jurisdiction: California
ID Number:
Name: Chris
Last 4 Digits of SSN/Government ID:
Birth Date:
Email Address:

Owner/Payor Signature

Before signing, you must review all pages of each of the 1 documents below.

Please click the buttons below to proceed.

➔

ApplicationTest19
✔

Sign

⊖
Cancel

1 DATA ENTRY ✔
2 REVIEW ⊖
3 SIGNATURES
4 FINALIZE

List of Required Signers for New Application - Julie Product

Joint Owner : Bob

Administrator

Completed Signatures

Payor / Owner:	Chris	3/10/2020	California	Re-Sign
----------------	-------	-----------	------------	--


Acceptance Criteria

- Ensure the user is clearly aware of what roles they are signing for during the Signing ceremony process
- Proper labeling of what roles the user is signing for during the signing ceremony process

3 Audit reports/History

The Firelight Packet Audit Report must be updated to show the user signing for multiple roles. We will want to be sure that when multiple roles are signed for that the Audit report reflects this accurately.

Example:

Identity Verification Summary							
Timestamp (UTC)	Party Type	Party Name	LexID	CVI	NAP	NAS	Status
Signature Summary							
Signature Identifier	d142728e-3962-4c6a-b920-acee049abbf2					Timeline	
Signing as	Payor, Owner, Joint Owner, and Administrator					3/10/2020 17:29	
Captured Name	fdg						
Captured State	California						
Captured City Name	fdg						
Captured Signature							
Identity Check Type	Agent Verification						

New Application - Julie Product
Page 1 of 2

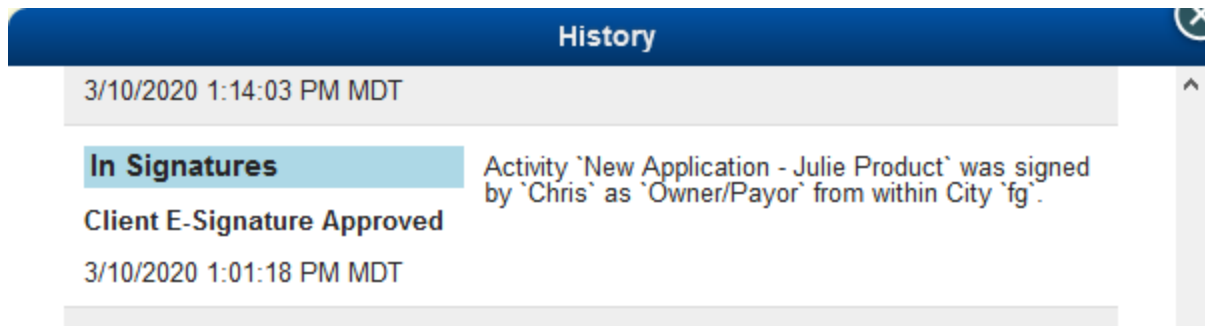
FireLight Packet Audit Report

Identification Type:	DriversLicense
Identification Number:	4533
Identification State:	California
Using IP Address	10.131.6.70

Signing Ceremony for Payor, Owner, Joint Owner, and Administrator (d142728e-3962-4c6a-b920-acee049abbf2)			
Timestamp (UTC)	Status	Event Type	Action Taken
3/10/2020 17:02	In Signatures	Begin Signing Ceremony	Signer `Owner/Payor` beginning signing ceremony.
3/10/2020 17:02	In Signatures	Page Displayed	Page 1 of form `ApplicationTest19` displayed.
3/10/2020 17:04	In Signatures	Client E-Signature Declined	`` `Owner` refused to sign activity ``.
3/10/2020 17:29	In Signatures	Begin Signing Ceremony	Signer `Owner/Joint Owner/Payor/Administrator` beginning signing ceremony.
3/10/2020 17:29	In Signatures	Page Displayed	Page 1 of form `ApplicationTest19` displayed.
3/10/2020 17:29	In Signatures	Leave-Behind Email Sent	An email containing a link to the signed activity documents was sent to `fdg` at address `chenry@insurancetechnologies.com`.
3/10/2020 17:29	In Signatures	Client E-Signature Approved	Activity `New Application - Julie Product` was signed by `fdg` as `Owner/JointOwner/Payor/andAdministrator` from within City `fdg`.
3/10/2020 17:29	Submit Requested	Link To Activity	An email containing a link to the completed activity was sent to `fdg` at address `chenry@insurancetechnologies.com`.

The history of the application will also need to reflect all roles that the user has signed for.

Example:



Acceptance Criteria

- Ensure the Firelight Package Audit reports reflects that the user signed for multiple roles.
Example: Audit report needs to show Owner and Payor as the signer.
- Verify History of application audit reflects the user has signed for multiple roles.
- Verify only one audit entry in History of application for user that signed for multiple roles.

4 Create Replacement text on Downloaded Completed Application email

On the Downloaded Completed Application email, we will need to create a replacement text. <SIGNER_ROLE> will need to be used to show what roles were signed for by the user. All roles that the user signed for must be included in the confirmation email.

Dear <CLIENT_NAME>,

Thank you for applying for '<PRODUCT_NAME>' of <COMPANY_NAME>.

You have signed for <SIGNER_ROLE>.

To download or print the completed application, please click on the link at the bottom of the email. You will be asked for your birth date and the last 4 digits of your social security number.

If you have questions please contact your producer.

To download or print your completed application, click on <URL_LINK>, Enter the last 4 digits of your SSN, and birth date. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of new browser window.

Example:

Dear chris,

Thank you for signing the application for 'Template Life Wizard' of FL Access Carrier.

You have signed for the roles of Owner and Payor.

To download or print the signed documents, please click on the link at the bottom of the email. You will be asked for your birth date and the last 4 digits of your SSN to login.

If you have questions please feel free to contact me.

Sincerely,

Chris Henry

To download or print signed application documents, click on <https://firelight.insurancetechnologies.com/h1m> and enter the last 4 digits of your SSN and your birth date. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of a new browser window.

Acceptance Criteria

- Apply <SIGNER_ROLE> to the Downloaded Completed Application email.
- Ensure that all roles the user signed for are listed on the Downloaded Completed Application email. (Example: if user signs as Owner and Payor then Owner and Payor must show on the Downloaded Completed Application email).

5 Confirmation emails

Since the user will be signing for multiple roles, we will need to eliminate multiple confirmation emails being generated and sent. Only one confirmation email should be sent to the user if they are signing for multiple roles.

Dear chris,

Thank you for signing the application for 'Template Life Wizard' of FL Access Carrier.

To download or print the signed documents, please click on the link at the bottom of the email. You will be asked for your birth date and the last 4 digits of your SSN to login.

If you have questions please feel free to contact me.

Sincerely,

Chris Henry

To download or print signed application documents, click on <https://firelight.insurancetechnologies.com/2XM> and enter the last 4 digits of your SSN and your birth date. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of a new browser window.

Acceptance Criteria


- Only one confirmation email will generate and be sent to the user if they have signed for multiple roles


6 Verify Enable Single User to Sign multi Signer Types is enabled

Verify Enable Single User to Sign multi Signer Types is enabled. This checkbox must be checked for Multisign in the Firelight Application to work correctly.

Groups - FL Access Carrier

Groups

 [Create New](#)



Name ▼	TC Role Code	
Agent	FLA10	X
Default	Default	X
Firm Admin/Support	FLA25	X
Insurance Technologies	InsTech	X
Registered Representative	FLA20	X
Reviewing Principal	FLA30	X
Test	123	X
UNICO	UNICO	X

Last Updated On : 11/22/2019 10:42:24 UTC

Name

Illustration Services Role Code

TC Role Codes

FLA10

App

Admin

Review Queue

Activity Access

Product Access

Case Access

Review Queue Access

Needs Filter

Debugging Tools

Training

Menu Options

☐ Disable Email After Submit

☐ Disable Send Email Request

☐ Optional Client Email

☐ Disable Edit Preferences

☐ Disable Log Off

☒ Enable CRM Preferences

☒ Enable Training

Notifications

☐ Enable Form Changes Notifications

☒ Enable Use Screen Notification

Other Actions

☐ Disable Show Annotations

☐ Disable View Activities Summary

☐ Disable View Documents

☐ Disable View History

Share/Transfer/Case Access

☒ Allow Activity Share

☒ Allow Transfer Activity

☐ Case Access by Firm ID

☒ Enable All Activities User Share

Signing: General

☐ Agent Not Required to View All Pages

☒ Allow Edits to Mobile

☐ Disable Decline E-Sign

☐ Disable Signing as Agent

☐ Disable Signing as Client

☐ Disable Signing Until All Pages Viewed

☐ Disable Sign Now

☒ Enable Single User to Sign Multi Signer Types

☐ Enable Override SSO

☒ Require Signature Capture

Testing

☒ Enable Create Benchmarks

☐ Enable Test Mode

☒ Enable Override Date

☒ Enable View Benchmarks

User Rights Home/All Activities

☐ Disable Copy Activities

☐ Disable Delete Activities

☐ Disable Editing Other Users' Activities

☐ Require Entry of Activity Name

☐ Disable Home Screen

☐ Disable Save Activities

☐ Disable View Activities

☐ Disable View Activity List

Acceptance Criteria

- Enable Single user to sign multi signer types checkbox, enables the multi sign function in Firelight.

7 Ensure all enhancements to the Multi-Sign are updated in the Tele-Sign process

With the enhancements that are being implemented to the signing ceremony for Multi-Sign, we will want to ensure that these changes flow to the Tele-Sign process as well. This will need to include the following areas of the telesign process:

Disclosure and Labeling:

As with the esign process, Telesign must inform the user on what roles are being signed for. The examples above shows the Annuitant and Owner are signing in the highlighted section.

Tele-Sign: Annuitant/Owner: - Signer Information & Form Access

Signer Information

Enter the city and state in which the signer will be located when they complete their telephone signature.

Signer Full Name: City:

State: Today's Date:

Form Access

It is required that the signer receive, read, and understand the purpose of the application being submitted. Please select the method of delivery below:

Delivery Type:

Download Forms

Back **Continue**

1 DATA ENTRY 2 **SIGNATURES** 3 REVIEW 4 FINALIZE

Client Signature Choice for Annuitant/Owner : Jane Client

Please indicate below the method you would like to use to obtain the client signature.

Sign Now **Send Email Request** **Tele-Sign**

1 DATA ENTRY

2 SIGNATURES

3 REVIEW

4 FINALIZE

Tele-Sign: Annuitant/Owner: Jane Client - Signer Information & Form Access

Signer Information

Enter the city and state in which the signer will be located when they complete their telephone signature.

Signer Full Name:

City:

State:

Colorado

Today's Date:

2/10/2020

Form Access

It is required that the signer receive, read, and understand the purpose of the application being submitted. Please select the method of delivery below.

Delivery Type:

Download

Download Forms

Back

Continue

Acceptance Criteria

- Disclosures will be reflected in the header that the user is signing for Multiple roles, ie. Annuitant/Owner