

iConnect 170326 Design Approach- Enhance Reviewer Functionality

Project Overview

The current implementation of the reviewer documents in the review queue has some limitations for some client workflows, as well as language that can be unclear for users. This enhancement will allow users to set reviewer forms as optional or required in the Admin tool. This will allow the user to bypass the reviewer forms in the review queue if they are optional and complete the review process. Changes to the user interface wording and organization will also make the process more intuitive.

Features/Requirements

- Add new “Reviewer Optional” package type
 - In OSJ view, “Approve” button will always show for any Review items that have “Reviewer Optional” forms/package to complete.
- If there are either “Reviewer Optional” or regular “Reviewer” forms/packages for a given OSJ item, and it is unlocked, it will just unlock, and no longer automatically prompt the user to fill in any necessary reviewer forms.
- For each item in the OSJ queue, if there are either “Reviewer Optional” or regular “Reviewer” forms/packages, a “Reviewer Documents” button will appear. Clicking this button will allow the user to fill and complete the reviewer forms.
 - If the reviewer forms are already complete, this button will just launch the pdf’s for the completed reviewer forms.
- For each item in the OSJ Queue, if there are regular “Reviewer” forms/packages, the “Approve” button will be disabled until the reviewer forms are completed.
- Changes in verbiage:
 - Change “View Dashboard” to “Reviewer Documents”
 - Change blue link “Reviewer Only Documents” to “Attach Documents”
 - Change complete dialog title from “Complete Dashboard” to “Finish Reviewer Documents” and text from “The Dashboard will be locked” to “The reviewer documents will be locked”
 - Remove “Fill Reviewer Dashboard” dialog removed as it is unnecessary
 - Change title in edit mode from “Reviewer Dashboard” to “Reviewer Documents”
 - References in Review History audits will be change from reviewer dashboard to reviewer documents
 - Change Review History audit text to “Reviewer begins filling the documents”
- Add ability to customize the text for the “Review” button that locks the application
- Move the review queue move button and queue drop down to space above the Review button
- Hide the review queue move and queue drop down when application is unlocked or requests are pending for more information

- In Admin tool, only one type of Reviewer-Only package is available per Sales Agreement – a Sales Agreement cannot have both a ‘Reviewer’ type package and a ‘Reviewer Optional’ type package.
 - If a Sales Agreement contains this combination, an error message will display when the Save button is clicked (and the Sales Agreement won’t be saved).
- In Admin tool, the Package Duty drop-down (contains the Conditional/Required options for a given package) is hidden on all Reviewer & Reviewer Optional packages. These packages will instead default to Required (and not allow for a change to that), which is necessary for their functionality later in the OSJ.

Use Cases / Workflow Changes

If the workflow allows for manual review queue move, the “Review” button may be relabeled “Unlock” as user may be moving the app to another queue rather than reviewing the app.

Admin Changes

- New “Reviewer Optional” package type available when creating/configuring a package.
- Error on Sales Agreement page when both Reviewer and Reviewer Optional packages are included in a Sales Agreement.
- On Sales Agreement page, Reviewer and Reviewer Optional packages no longer have a Package Duty drop-down visible – they instead default to ‘Required’.

App Changes

- New “Reviewer Documents” button that the reviewer user must use to launch the Reviewer/Reviewer Optional forms.
- Reviewer user will no longer be prompted to complete any reviewer forms upon locking the OSJ/review item.
- “Approve” button on OSJ/Review items will be disabled if any required “Reviewer” packages/forms are not yet completed.
 - “Approve” button will remain enabled if there are “Reviewer Optional” package/forms, regardless of whether they are completed or not.
- Verbiage changes related to reviewer documents
- Change to placement and visibility of manual review queue move drop down and button controls

Integration Changes

N/A

UI Mock Ups

4 low TestQ - FSE WL Product

Normal

Created: 1/5/2018 3:27:37 PM MST

Carrier: Product:

Solicitation State:: Colorado Agent Organization: Insurance Technologies

[Application PDF](#)
[Application History](#)
[Queue History](#)
[Attach Documents](#)
[Audit Report](#)

Review queue move controls only visible when they are enabled

50

Move

Unlock

Approve

Reject

More Info

18 Hi TestQ - FSE WL Product

Urgent

Created: 1/8/2018 10:46:10 AM MST

Carrier: Product:

Solicitation State:: Colorado Agent Organization: Insurance Technologies

[Application PDF](#)
[Application History](#)
[Queue History](#)
[Attach Documents](#)
[Audit Report](#)

Review

Approve

Reject

More Info

My Review Queue

ARM (0)

Queues

ARM (0)

abc (34)

Q2 (0)

50 (32)

BasicQ (5)

PreSubmit (19)

History

Summary

Reviewers

Adv Search

1 ... 8 9 10 11 12 34 items.

Copy of New Application - zachs

Locked by you

Normal

Created: 4/2/2018 2:24:25 PM MST

Carrier: Insurance Technologies Product: zachs

Jurisdiction: Alabama Agent Organization: Insurance Technologies

[Application PDF](#)
[Application History](#)
[Queue History](#)
[Attach Documents](#)
[Audit Report](#)

abc

Move

Unlock

Reviewer Documents

Approve

Reject

More Info

Screenshot showing new "Reviewer Documents" button

How to Enable and Use This Feature

- Create a “Reviewer Optional” package (with any desired forms), and apply it to a Sales Agreement of a product.
 - After completing an application of the necessary product, ensure it goes into an OSJ queue. Lock the application in the OSJ Reviewer interface, and the reviewer will now see the “Reviewer Optional” button.
- Click ‘Enable Manual Queue Move’ in the Review Queue Only tab in the Groups page of the Admin tool
- Verify that applications in the app portal’s review queue do not show the manual queue move controls if the application has not been locked (by clicking the Review button) or if the application has more info requests pending

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration	X	New package type “Reviewer Optional” available on the Packages page New logic on Sales Agreement page
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue	X	“Review” button text is customizable, UI changes to control placement and verbiage, and new “Review Documents” button with logic surrounding enabling/disabling of “Approve” button.
- Manual Review	X	Changes can also apply to Manual/PreSubmit queues.
- User Preferences		
- Inbound Integration		

- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		