



APPS Paramed Exam Order

Integration Guide

firelight

APPS PARAMED EXAM ORDER

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APPS Paramed Order Integration

Description

This Integration will allow for a Paramed exam to be scheduled within Firelight. It will send basic proposed insured's demographics and account information to the chosen Paramed ordering system via webservice calls. We are working to incorporate with the APPS Paramed ordering system that will be used to schedule a Paramed exam for the insured. The insured/or agent will choose the APPS Scheduled4Real Paramed online ordering system. Based on the proposed insured's demographics sent in a webservice call, it will determine which examiner(s) covers that requested exam completion location. If there are available time slots for the paramed exam to be completed, it will feed that data back into Firelight. The insured/or agent will select the requested time slot and another webservice call is submitted to APPS to lock in the appointment. up the location's Examiner(s) and time slots availability for a requested date. This new functionality will be managed via a custom action button within the activity. All clients that want to use this service are required to contract directly with APPS.

APPS: Schedule4Real

Impacts:

Activities: Adding checkbox to enable Paramed ordering. Adding a hidden checkbox to determine when the order is to be facilitated: Pre- or Post-Signature.

Admin: Third Party Configuration – Adding a new Service Type

Data Group Properties

Email Templates: Different status of Paramed ordering (to be delivered in February 2022)

UI Changes: Statuses (to be delivered in February 2022)

Common Tags

API Structure: Send required insured data and account info, order ID and availability will open and save in the database. We will then submit the order to Apps with the same tracing ID and lock the order with the schedule.

Forms: Data Group Properties

Wizards: Data Group Properties

Reports: Usage

Audits: Addition of new codes needed for ACORD 1122 status updates

APPS Services Setup

To use the APPS Paramedical Exam services, contracting needs to be established between your organization and APPS. Please reach out to APPS to start this process.

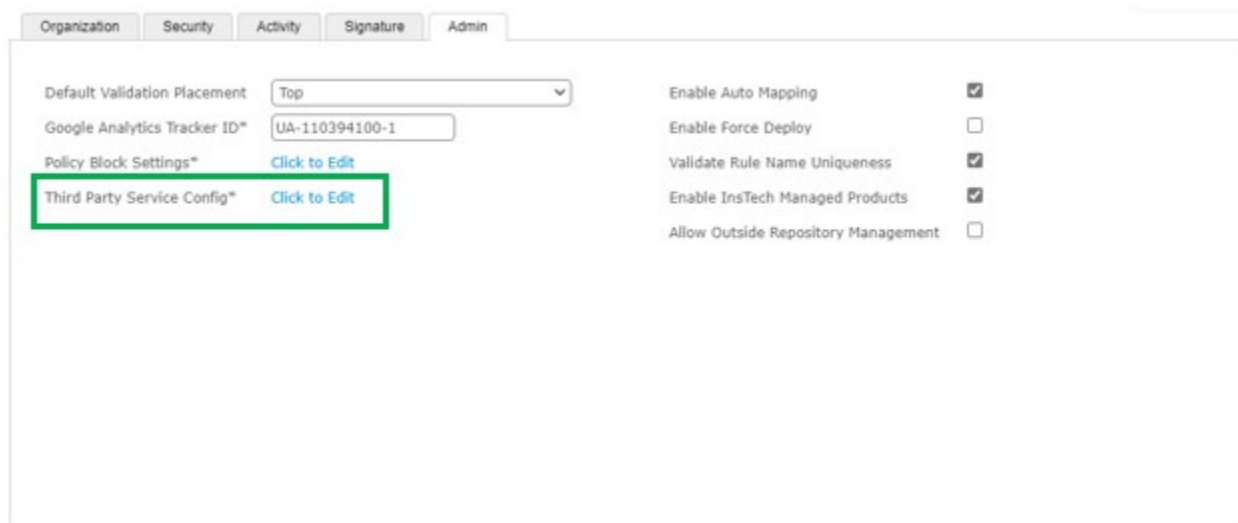
1 Setting up APPS Integration in Admin Tool

There are several steps to setup the APPS integration in Firelight.

1.1 Organization Settings

In Organization Configuration on the Organization Settings page, Admin Tab: set up the APPS Paramedical credentials. APPS Paramedical supplies the configuration names and values.

On the Admin tab, click the Third Party Service Config to Edit Link.



The screenshot shows the 'Admin' tab selected in the top navigation bar. Below the tabs, there are several configuration options. On the left, 'Third Party Service Config*' is highlighted with a green box, with a 'Click to Edit' link next to it. On the right, there are several toggle switches: 'Enable Auto Mapping' (checked), 'Enable Force Deploy' (unchecked), 'Validate Rule Name Uniqueness' (checked), 'Enable InsTech Managed Products' (checked), and 'Allow Outside Repository Management' (unchecked).

1.1.1 Third Party Service Configuration for APPS

On the Add New Link at the top of the page. Enter the APPS Paramedical service credentials (configuration IDs and values):



The screenshot shows a table titled 'Third Party Service Configuration'. At the top of the table, there is a blue bar with the title and an 'Add New' link highlighted with a green box. Below the bar, the table has columns: 'Service Type', 'Config Group', 'Config Name', 'Config Value', 'Update', and 'Delete'.

1.1.1.1 Account ID

Click the Add New link at the top of the dialogue box. In Config Name, type Account ID. In the Config Value, type the APPS Paramedical value. In Service Type, select APPS and click Add Config button.

1.1.1.2 Password

Click on the Add New link at the top of the dialogue box. In Config Name, type Password. In Config Value, type the APPS Paramedical value. In Service Type, select APPS and click Add Config button.

1.1.1.3 Username

Click on Add New link at the top of the dialogue box. In Config Name, type Username. In Config Value, type the APPS Paramedical value. In Service Type, select APPS and click Add Config button.

Third Party Service Configuration

[Add New](#)

Config Name	<input type="text" value="AccountID"/>
Config Value	<input type="text" value="*****"/>
Config Group (Optional)	<input type="text"/>
Service Type	<input type="text" value="APPS"/>

Add Config

Third Party Service Configuration

APPS	<input type="text"/>	AccountID	<input type="text" value="*****"/>	Update	Delete
APPS	<input type="text"/>	Password	<input type="text" value="*****"/>	Update	Delete
APPS	<input type="text"/>	Username	<input type="text" value="*****"/>	Update	Delete

1.2 APPS: New Group - Paramed Ordering

A New Group for "Paramed Ordering" has been added to the App tab. This new section for "Paramed Ordering" and allows for the carrier to choose which paramed vendor(s) can be used for paramed exam scheduling. Under the "Paramed Ordering" section we will

need to add two new options with checkboxes: APPS and ExamOne (available for use once ExamOne Integration is completed in an upcoming release). These boxes will be mutually exclusive, but are optional, so both can be checked or unchecked.

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

Last Updated On : 10/22/2021 11:05 AM UTC

Name: Illustration Services Role Code: TC Role Codes:

App Admin Review Queue Activity Access Product Access Case Access Needs Filter Debugging Tools Training Group History

Emails

- ☒ Allow PassCode Email
- ☒ Auto-Email PassCode
- ☒ Enable Auto Submit Email Notification
- ☐ Enable Cc Sender In All Requests
- ☒ Enable Decline E-Sign Email
- ☒ Enable Leave-Behind Email
- ☒ Enable Submit Email for Agent
- ☐ Enable Submit Email for Reviewer
- ☒ Enable Use Agent Email
- ☐ Disable Email After Submit
- ☐ Optional Client Email

Menu Options

- ☐ Disable Copy
- ☐ Disable Edit Preferences
- ☐ Disable Log Off
- ☒ Enable CRM Preferences

Other

- ☒ Active Agent User List
- ☐ Disable Console For Group
- ☒ Enable Multi-Life
- ☒ Enable Multiple Open Activities

Paramed Ordering

- ☒ Enable APPS
- ☐ Enable ExamOne

Print Options

- ☐ Enable Custom Print Override
- ☐ Enable Print Individual Forms After Lock
- ☐ Enable Print NIGO
- ☐ Disable Print PDF

Quote

- ☐ Disable Annuity Quotes
- ☐ Disable Life Quotes
- ☒ Sales Agreement Products Only

Signing: Tele-Sign

- ☒ Enable Tele-Sign Download Forms
- ☒ Enable Tele-Sign Generate Link
- ☒ Enable Tele-Sign Email Link
- ☒ Enable Tele-Sign

Submit

- ☒ Allow Not In Good Order Submittals
- ☒ Enable Auto Submit
- ☐ Enable Custom Submit Page
- ☐ Disable Continue at 100%
- ☐ Enable HTTP Redirect on Submit

URL:

Testing

- ☒ Enable Create Benchmarks
- ☐ Enable Test Mode
- ☐ Enable Override Date
- ☒ Enable View Benchmarks

Save

1.3 Wizard Designer

1.3.1 Create Wizard

Set up the product inputs in the Wizard Designer. The wizard will contain the paramed scheduling proposed insured's requirements, such as face amount, age, proposed insured gender, proposed insured state, proposed insured zip code, which will be utilized to determine if a paramed exam is required and which examiner(s) and time slot(s) are available to schedule a paramed exam on a requested exam date.

Refer to the Wizard Designer section in the help for details.

1.3.2 APPS: Custom Action Button

Create a Custom Action button on the desired wizard page to launch the APPS Paramed Exam scheduling. Optionally add rules to control when the custom action button is available.

Custom Action Properties

☒ Place Field on a New Row

Field Name

APPS_Calendar_Custom_Action

Text

Check Availability

Width

4

Mobile Width

Enter a Value

Class Name

Enter a Value

Help Text

Enter a Value

Data Group

Insured

Custom Action

Custom Action

Custom Action Type

APPS

Custom Action Parameter

APPSCheckAvailability

CANCEL

OK

Refer to the Custom Action section in the help for details about adding the custom action button.

- Set the Custom Action to Custom Action.
- The Custom Action Type will appear. Set this to APPS.
- The Custom Action Parameter will appear.
- Depending on which action you are setting up, you will be ***required to manually type*** in the coordinating web service call out. APPS utilizes:

- APPSCheckAvailability
- APPSMakeReservation
- SubmitParamedOrder

1.3.3 Add a new Custom Action Type named APPS for wizard

Add a new Custom Action Type to the Wizard and Form Designers. When “Custom Action” is selected under Custom Action, another dropdown appears names Custom Action type with “APPS” as an option in the list. This will be used to identify which vendor will be utilized in the wizard or form, which will be used to launch APPS.

Custom Action Properties

☒ Place Field on a New Row

Field Name
APPS_Calendar_Custom_Action

Text
Check Availability

Width
4

Mobile Width
Enter a Value

Class Name
Enter a Value

Help Text
Enter a Value

Data Group
Insured

Custom Action
Custom Action

Custom Action Type
APPS

Custom Action Parameter
APPSCheckAvailability

CANCEL OK

1.3.4 Add Custom Action Parameter to Custom Action Properties

“APPS” is the Custom Action Type when a Custom Action button is added through the forms/wizard designer.

Custom Action Parameters – you will be ***required to manually type*** in the coordinating webservice all out. APPS utilizes:

- APPSCheckAvailability (this webservice calls the APPS Schedule4Real service to retrieve examiner and time slot availability)
- APPSMakeReservation (this webservice calls the APPS Schedule4Real service to the book the paramed exam appointment)
- SubmitParamedOrder (this webservice call, will submit the paramed order ticket to the APPS vendor)

Custom Action Properties

☒ Place Field on a New Row

Field Name

APPS_Calendar_Custom_Action

Text

Check Availability

Width

4

Mobile Width

Enter a Value

Class Name

Enter a Value

Help Text

Enter a Value

Data Group

Insured

Custom Action

Custom Action

Custom Action Type

APPS

Custom Action Parameter

APPSCheckAvailability

CANCEL

OK

1.4 Rules

Set up the rules that apply to the wizard, which are associated with the APPS integration. Common rule examples and APPS data items are outlined in this section. **PLEASE NOTE:** the below example rules are just a subset of the rule sets. For the complete rule sets, please access the Ruleset File listed below.

A complete ruleset and wizard template are located in: Admin Help

- The Wizard file name is "Paramed APPS Wizard.txt".
- Ruleset file name is "Paramed APPS Rule Set".

All rule examples in this section assume you are using the data item ID of "FLI-UNDERWRITING_PARAMED_SELECTED".

1.4.1 Control when the Paramed Exam Scheduling takes place: Pre- or Post-Sign

This is determined by the carrier as part of their set-up and is applicable to all carrier users. This cannot be changed by and agent or distributor.

Required: FLI_UNDERWRITING_PARAMED_SELECTED

```
<block>
  <set name="message">
    <const value="This field is required." type="String" />
  </set>
  <if>
    <condition>
      <isnullorwhitespace>
        <diget dataitemid="FLI_UNDERWRITING_PARAMED_SELECTED" />
      </isnullorwhitespace>
    </condition>
    <postmessage dataitemid="FLI_UNDERWRITING_PARAMED_SELECTED">
      <get name="message" />
    </postmessage>
  <else />
    <removemessage dataitemid="FLI_UNDERWRITING_PARAMED_SELECTED" />
  </if>
</block>
```

1.4.2 Enable (Valued): FL_UNDERWRITING_PARAMED_SELECTED

This rule enables the common data tag associated with the Paramed Vendor designation to be used by the agent. Day 1, only APPS is available.

```
<setcontrolstate dataitemid="FLI_UNDERWRITING_PARAMED_SELECTED"
clearondisable="true">
  <compare op="==">
    <diget dataitemid="Exam_Order_Request" />
    <const value="Yes" type="String" />
  </compare>
</setcontrolstate>
```

1.4.3 Leverage APPS Check Availability to Control the Request Exam Date

Set up rule to check the availability of the Request Exam Date.

```
<block>
  <set name="message">
    <const value="The date requested must be at least 3 days from now." />
  </set>
  <if>
    <condition>
      <not>
        <isnullorwhitespace>
          <diget dataitemid="APPS_Requested_Exam_Date" />
        </isnullorwhitespace>
      </not>
      <not>
        <isnull>
          <diget dataitemid="APPS_Requested_Exam_Date" type="DateTime" />
        </isnull>
      </not>
      <not>
        <compare op=">=">
          <abs>
            <datetimedifference option="Day">
              <datetimenow />
              <diget dataitemid="APPS_Requested_Exam_Date" type="DateTime" />
            </datetimedifference>
          </abs>
        </compare>
      </not>
    </condition>
  </if>
```

```

        <const value="3" />
    </compare>
</not>
</condition>
<postmessage dataitemid="APPS_Requested_Exam_Date">
    <get name="message" />
</postmessage>
<else />
    <removemessage dataitemid="APPS_Requested_Exam_Date" />
</if>
</block>

```

1.4.4 Leverage APPS Book Appointment to Control the Confirm the Exam Date

```

<setcontrolstate dataitemid="APPS_Reservation_Custom_Action" clearondisable="true">
    <and>
        <compare op="==">
            <diget dataitemid="Check_SpecificDate_APP" />
            <const value="Yes" />
        </compare>
        <isnullorwhitespace>
            <diget dataitemid="APPS_Paramated_Confirm_ID" />
            </isnullorwhitespace>
        </and>
    </setcontrolstate>

```

1.4.5 Paramed Data Items to be used in Rules

List of Paramed specific data items that can be used in rules and the provider. Along with the Admin control in the Groups Settings, these dataitems are used to give the user additional control, to help support our carrier/distributor preference. These dataitems are listed below:

- FLI_UNDERWRITING_PARAMED_REQUIRED
- FLI_UNDERWRITING_PARAMED_SELECTED
- FLI_UNDERWRITING_PARAMED_POST_SIGNATURE

FLI_UNDERWRITING_PARAMED_REQUIRED will allow the paramed ordering to be either enabled or disabled based on carrier

preference. `FLI_UNDERWRITING_PARAMED_REQUIRED=true` will enable paramed ordering, while `FLI_UNDERWRITING_PARAMED_REQUIRED=false` will disable the functionality.

FLI_UNDERWRITING_PARAMED_SELECTED will give the user the choice to either choose between the APPS ordering platform or the ExamOne ordering platform. "APPS" or "ExamOne" will be used as list values. For example: FLI_UNDERWRITING_PARAMED_SELECTED const value=APPS would allow the APPS ordering platform to be called, while FLI_UNDERWRITING_PARAMED_SELECTED const value=ExamOne would allow the ExamOne ordering platform to be called.

FLI_UNDERWRITING_PARAMED_POST_SIGNATURE is used to indicate a carrier's decision on when the order can be placed. The export values are 'true' or 'false'. When 'true' is utilized, it triggers the 'post' signature order process. When 'false' is utilized, it triggers a 'pre' signature order process.

NOTE: This must be determined by the carrier at the beginning of setup. The selection applies to all scenarios.

1.5 Data Group Properties for Paramed Ordering Values

New data group properties are required to capture information returned from the vendor webservice calls for the paramed ordering. Specific dataitems will need to be added to the package for each of these data group properties in order to capture the returned data elements. These new data group properties are listed below:

Paramed_ExamLocationAddress_Line1
Paramed_ExamLocationAddress_Line2
Paramed_ExamLocationAddress_City
Paramed_ExamLocationState
Paramed_ExamLocationAddress_Zipcode
Paramed_ExamLocation Phone

1.6 APPS Paramed Exam Scheduling: Required Data Group Properties

The following data group properties are required for the webservice calls to the APPS paramed vendor. **The data group to be used is to be, 'Insured'.**

APPS Check Availability:

(Username, User Password, Account Number – provided by APPS)

Required insured demographic (**Data Group>Data Group Property**):

Age (**Insured>Paramed_Exam_Age**)
Amount (**Insured>Paramed_Exam_Amount**)
Gender (**Insured>Paramed_Exam_Gender**)
Zip Code (**Insured>Paramed_Exam_Zip**)
Application State (**Insured>Paramed_Exam_State**)
Reservation Date (**Insured>Paramed_Exam_Request_Day**)

APPS Make Reservation:

(Username, User Password, Account Number – provided by APPS)

Age (**Insured>Paramed_Exam_Age**)
Amount (**Insured>Paramed_Exam_Amount**)
Gender (**Insured>Paramed_Exam_Gender**)
Zip Code (**Insured>Paramed_Exam_Zip**)
Application State (**Insured>Paramed_Exam_State**)
Reservation Date (**Insured>Paramed_Exam_Reserve_Day**)
Examiner ID (**Insured>Paramed_ExaminerID**)
Time (**Insured>Paramed_Exam_Time**)

APPS Make Reservation XML Return: Successful or Unsuccessful

Paramed_ConfirmationID
Paramed_Exam_Message

APPS Covering Office Zip Code:

Paramed_ExamLocationState
Paramed_ExamLocationAddress_Line1
Paramed_ExamLocationAddress_Line2
Paramed_ExamLocationAddress_City
Paramed_ExamLocationAddress_Zipcode
Paramed_ExamLocation_Phone

1.7 APPS: New Tag Creation of <PARAMED_VENDOR_NAME> for use within the new email templates for the Paramed Status communications

To properly populate the vendor information within the newly created email templates for the paramed exam integration (ordering) effort, a new email tag of <PARAMED_VENDOR_NAME> has been created.

This tag will be included in each of the four new email templates that have been created. This field / tag will receive the name of the specific paramed exam vendor, APPS, that is performing the services and sending status updates for the case. This tag will be populated by the vendor's name, APPS, as extracted from the vendor's paramed exam status file (1122 file)

1.8 APPS: Email Templates for Status

Four new email templates have been created. These emails will keep the advisor apprised of any status updates related to the processing of the scheduled exam.

- Paramed Exam Status APPS: Update
- Paramed Exam Status APPS: Agent Action Recommended
- Paramed Exam Status APPS: Exam Cancelled
- Paramed Exam Status APPS: Complete

Templates are as follows:

Email Category: System

Email Template Type: **Paramed Exam Status APPS: Agent Action Recommended**

Email Subject: <CASE_NAME> -Paramed Exam Status Update: Agent Action Recommended

Dear <AGENT_NAME>.

<CASE_NAME> has received a status update from <PARAMED_VENDOR_NAME> on behalf of <COMPANY_NAME>. The status received from <PARAMED_VENDOR_NAME> indicates your client may have some questions or <PARAMED_VENDOR_NAME> is having difficulties in contacting your client. You may wish to contact your client to answer any questions

and/or help secure updated information for <PARAMED_VENDOR_NAME>. Please contact <PARAMED_VENDOR_NAME> directly for additional details.

<MESSAGE>

Email Category: System

Email Template Type: **Paramed Exam Status APPS: Exam Cancelled**

Email Subject: <CASE_NAME> - Paramed Exam Cancelled

Dear <AGENT_NAME>.

<CASE_NAME> has received a status update from <PARAMED_VENDOR_NAME> on behalf of <COMPANY_NAME>. The status returned indicates that this paramedical exam has been cancelled. Please contact <PARAMED_VENDOR_NAME> directly for additional details.

<MESSAGE>

Email Category: System

Email Template Type: **Paramed Exam Status APPS: Update**

Email Subject: <CASE_NAME> - Paramed Exam Status Update

Dear <AGENT_NAME>.

<CASE_NAME> has received a status update from <PARAMED_VENDOR_NAME> on behalf of <COMPANY_NAME>. This email is being sent to inform you of the current status of the paramedical exam order. Agent action may or may not be necessary at this time. Please contact <PARAMED_VENDOR_NAME> directly for additional details.

<MESSAGE>

Email Category: System

Email Template Type: **Paramed Exam Status APPS: Complete**

Email Subject: <CASE_NAME> - Paramed Exam Completed

Dear <AGENT_NAME>.

<CASE_NAME> has received an updated status from <PARAMED_VENDOR_NAME> on behalf of <COMPANY_NAME>. The status received from <PARAMED_VENDOR_NAME> indicates that this paramedical exam order has been completed.

<MESSAGE>

1.9 APPS: Status Code that will trigger each Email Template

There are four possible email templates that could be triggered based on the information received in the APPS 1122 status file (*these templates will be available and can be utilized in the February 2.23 release*). These templates are:

Paramed Exam Status APPS: Update

Paramed Exam Status APPS: Agent Action Recommended

Paramed Exam Status APPS: Exam Cancelled

Paramed Exam Status APPS: Complete

2 APPS: Create New Page

In signing ceremony, applied signature, "I Consent", when still in signatures - a new page will display for Paramed scheduling information to display.

2.1 APPS: New Data Page for Post-Signature Workflow

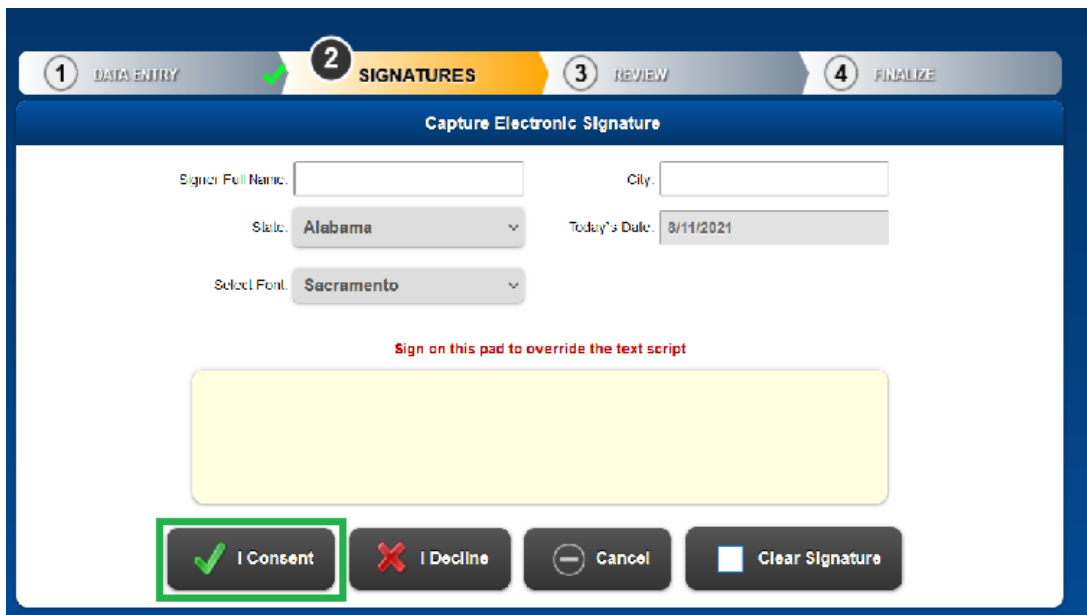
- APPSCheckAvailability
- APPSMakeReservation
- SubmitParamedOrder

New Data Page to be created to support the ordering of the paramed exams POST client signature process. This new Data Page to be displayed after the Proposed Insured has signed the application and has selected "I Consent" on the signature panel and the common data tag FLI_UNDERWRITING_PARAMED_APPS is set to 'post' and the common data tag FLI_UNDERWRITING_PARAMED_SELECTED is set to APPS.

The dataitemid FLI_UNDERWRITING_PARAMED_POST_SIGNATURE = 'true' indicates the carrier's preference to allow the paramed exam to be ordered but only AFTER the Proposed Insured has signed the application.

The dataitemid FLI_UNDERWRITING_PARAMED_SELECTED will indicate which Vendor will be called. Export value of 'APPS' will allow for integration with APPS and the export value of 'ExamOne' will allow for the integration with ExamOne

Once the Insured has clicked on the "I Consent" button in the eSig process:



The New Data Page:

Please select the date that you would like to schedule the Paramed Exam: (the default of the first available date, needs to be 3 business days out from current date)

Sample screen that will display to start the scheduling process. Date will auto-populate with a date that is 3 days out from current date. ***Please note: APPS requires that the requested date must be at least 3 business days out from current date.***

1 DATA ENTRY ✓

2 SIGNATURES

3 FINALIZE

Paramed examination scheduling for Insured

Please enter the date that you would like to schedule the Paramed Exam:

✓ Check Availability

— Skip

Sample screen with response back from APPS with the requested date and the available time slots:

1 DATA ENTRY ✓

2 SIGNATURES

3 FINALIZE

Paramed examination scheduling for Insured

Please enter the date that you would like to schedule the Paramed Exam:

✓ Check Availability

Please select the day that you would like to schedule the Paramed Exam:

Please select the time that you would like to schedule the Paramed Exam:

20 available appointments

✓ Book Exam Appointment

— Skip

Sample screen with response back from APPS with a confirmation that the appointment has been booked:

1 DATA ENTRY ✓

2 SIGNATURES

3 FINALIZE

Paramed examination scheduling for Insured

Please enter the date that you would like to schedule the Paramed Exam:

Please select the day that you would like to schedule the Paramed Exam:

Please select the time that you would like to schedule the Paramed Exam:

20 available appointments

(Success de360aa2-608e-4387-b306-54247d0d65e3)

✓ Continue

2.2 APPS: New Data Page for Pre-Signature Workflow

New Data Page to be created to support the ordering of the paramed exams PRE client signature process. This new Data Page to be displayed after the Proposed Insured has signed the application and has selected "I Consent" on the signature panel and the common data tag FLI_UNDERWRITING_PARAMED_APPS is set to 'pre' and the common data tag FLI_UNDERWRITING_PARAMED_SELECTED is set to APPS.

The dataitemid FLI_UNDERWRITING_PARAMED_POST_SIGNATURE = 'false' indicates the carrier's preference to allow the paramed exam to be ordered but only AFTER the Proposed Insured has signed the application.

The dataitemid FLI_UNDERWRITING_PARAMED_SELECTED will indicate which Vendor will be called. Export value of 'APPS' will allow for integration with APPS and the export value of 'ExamOne' will allow for the integration with ExamOne

[new common data tag referenced above are being requested for this release]

Sample Form:

Example of Firelight Wizard Screens:

Sample of wizard layout – Would you like to order a paramed exam at this time? Please select a paramed exam vendor – APPS:

Would you like to order a paramed exam at this time?

1. If "No" – no exam will be scheduled at this time, and no order will be sent to the paramed vendor. Also, no additional paramed screens are needed.

Paramed Exam

Would you like to order a paramed exam at this time?

☒ Yes

☐ No

Please select a paramed exam vendor:

☒ APPS

☐ ExamOne

Sample of layout with helpful instruction notes – text to be removed:

Paramed Request

Paramed APPS

Questions needed to be added to carrier process to help facilitate paramed exam triggers.

Would you like to order a paramed exam? ☒ Yes ☐ No

Please select your preferred paramed vendor: ☒ APPS ☐ ExamOne

The two questions above will need to be asked first, regardless of when the order is to take place, either pre-signature or post-signature. If the carrier has determined the order is pre-signature, the remainder of the wizard below needs to be set up to facilitate that process. If the order is to happen post-signature, none of the APPS PARAMED ORDERING wizard needs to be set up as all of the remaining steps will be displayed after the signature is collected.

☒ Pre Sign order ☐ Post Sign order

These are common tag items specific to the Paramed order process and these dataitemids and corresponding export values must be used. These are to be hidden items and uneditable. The carrier is to determine up front what they will allow for paramed ordering. They have to indicate if they will allow the agent to trigger a paramed order prior to the application being signed or if the paramed order must take place after an app is signed. The export value of "false" indicates the paramed order is to take place as part of the data collection process pre-signature. An export value of "true" indicates the paramed final ordering will take place after the insured has signed the application.

Check Availability outbound webservice call:

1. Would you like to check and see if a specific date is available for the paramed exam?
 - a. No – if they answer “No”, no paramed exam is scheduled, the Submit Paramed Order Custom Action Button is to be displayed. This will allow the agent to immediately submit the paramed order to the vendor. In this instance, the vendor will contact the client directly to schedule the paramed exam.
 - b. Yes – if they answer “Yes”, the required steps will display.
2. Input a Requested Exam Date, that ***must be at least 3 business days out from current date.***
3. Click on the ‘Check Availability’ button in triggered the webservice call to APPS to retrieve what examiner(s) and time slot(s) are available to select from.

Would you like to check and see if a specific date is available for the paramed exam? ☒ Yes ☐ No

Requested Exam Date

Response

Available Day

Available Times

Book Exam Appointment

Confirmation ID

Check Availability webservice call returned response:

1. If there are appointments available for the requested exam date, a response will be returned and populated in the 'Response' field.
2. The 'Available Day' field will be populated with the requested exam date.
3. The 'Available Times' dropdown field will be populated with all of the available time slots.
4. Click on the 'Book Exam Appointment' to lock in the appointment with APPS.

Requested Exam Date

12/17/2021

Response

31 available appointments

Available Day

12-17-2021

Available Times

12:00 PM

Book Exam Appointment

Confirmation ID

Book Exam Appointment webservice call returned response:

1. Once 'Book Exam Appointment' button is clicked on, if the booking is successful, a confirmation ID will populate the 'Confirmation ID' field.
2. The order for the paramed exam, is submitted to APPS at this time.

Would you like to check and see if a specific date is available for the paramed exam?

☒ Yes

☐ No

Requested Exam Date

12/17/2021

Check Availability

Response

Success

Available Day

12-17-2021

Available Times

12:00 PM

Book Exam Appointment

Confirmation ID

3aa69dc4-0071-4227-afaf-ee3b1ffc6af6

The dataitemid **FLI_UNDERWRITING_PARAMED_SELECTED** will indicate which Vendor will be called. Export value of 'APPS' will allow for integration with APPS and the export value of 'ExamOne' will allow for the integration with ExamOne

[new common data tag referenced above are being requested for this release]

3 APPS: Audit and Activity Reports

Audit history will be updated whenever there is a webservice call out to schedule a paramed exam, check availability, book appointment. Also, when a status file has been received, and when an email has been sent to the agent.

3.1 APPS: Create Activity Report

An activity report is being creating that can be triggered daily, weekly, or monthly based on carrier preference.

Report is to include:

- Organization name
- From Date
- Through Date

Data Columns to be included are:

- **Paramed Vendor** (name of the specific vendor used for the paramed exam)
- **Paramed Status** (current status in FireLight of the paramed exam as determined by the processing of the 1122 status file)

- **Order Date** (date in which FireLight originally sent the paramed exam order to the vendor)
- **Last Status Date** (Date in which the most recent 1122 status file was received, if any. If no 1122 status file has yet been received, this is to remain blank.)
- **Product Name**
- **ApplicationID**
- **Application Name**
- **Writing Agent Name**
- **Username**
- **External Role Code**
- **Carrier**

Sample Report:

Organization: XYZ Insurance Co

From Date: 9/01/2021

Through Date: 9/17/2021

Paramed Vendor	Paramed Status	Order Date	Last Status Date	Product Name	DTI Number	Application Name	Writing Agent Name	User Name	External Role Code	Carrier
APPS	Paramed Scheduled	9/16/2021	09-16-2021	Single Premium Whole Life: Application	6407XYZxxxxxxx	John Doe - Life A	Jane Smith	Jane Smith	1	XYZ insurance Co
APPS	Paramed Completed	09/05/2021	09/12/2021	Single Premium Whole Life: Application	6407XYZxxxxxyy	Santa Clause: Life	Jane Smith	Jane Smith	1	XYZ Insurance Co
APPS	Paramed Cancelled	9/01/2021	09/15/2021	Single Premium Whole Life: Application	6407XYZxxxxwww	Jane Doe - Life A	Robert Johnson	Joe Admin	1	XYZ Insurance Co

4 Additional Information

Admin Help - Ruleset