
Add support for state specific quote product documents

FIRELIGHT BASE

FireLight®

Platform

ADD SUPPORT FOR STATE SPECIFIC QUOTE PRODUCT DOCUMENTS

Document Version: 1.x

Published: January 27, 2021

Insurance Technologies, LLC

Copyright © 2021 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 240184 Design Approach - Add support for state specific quote product documents	4
1 Add state specific quote documents in the Product Repository	4
2 Display state specific quote documents	6

iConnect 240184 Design Approach - Add support for state specific quote product documents

Project Overview

Carriers need the ability to show state specific documents with the annuity quotes, such as a product guide.

1 Add state specific quote documents in the Product Repository

Carriers need to be able to upload state-specific documents for quote products, such as a different product guide for Florida and New York and then another product guide for the remaining states.

Note: If a document type needs to be replaced, it must first be deleted, then uploaded (no change to current logic).

Add the State selection list to the quote product documents dialog.

Product Repository - FL Access Carrier				
Financial Protection	87151W16F	164		Fixed Indexed Annuity
Fixed Advantage	872349112		Fixed Advantage	Fixed Annuity
			A Fixed Annuity product with an extended benefit plus additional features.	
Guaranteed Fixed Extra	FSEFATEST			Fixed Annuity
Income Promise Select - SPIA	63866W340		Income Promise Select - SPIA	Fixed Annuity
Income Provider Plus	676554239		Income Provider Plus	Fixed Indexed Annuity
Index Select	87151W160		Symetra Edge 7 Fixed	Fixed Indexed Annuity

[Upload File](#)
[Product Documents](#)

018815282 Fixed Index Annuity

Product Documents

Document Type:

Note: Documents must be in PDF format and no larger than 7 MB.

Choose File No file chosen

Upload

State	Approved
Alabama	<input checked="" type="checkbox"/>
Alaska	<input checked="" type="checkbox"/>
Arizona	<input checked="" type="checkbox"/>
Arkansas	<input checked="" type="checkbox"/>
California	<input checked="" type="checkbox"/>
Colorado	<input checked="" type="checkbox"/>
Connecticut	<input checked="" type="checkbox"/>
Delaware	<input checked="" type="checkbox"/>
District of Columbia	<input checked="" type="checkbox"/>
Florida	<input checked="" type="checkbox"/>
Georgia	<input checked="" type="checkbox"/>
Guam	<input checked="" type="checkbox"/>
Hawaii	<input checked="" type="checkbox"/>
Idaho	<input checked="" type="checkbox"/>
Illinois	<input checked="" type="checkbox"/>
Indiana	<input checked="" type="checkbox"/>
Iowa	<input checked="" type="checkbox"/>
Kansas	<input checked="" type="checkbox"/>

☒ Check/Uncheck All

Acceptance Criteria

- State selection list appears in the quote product documents dialog.
- All states are selected by default.
- Applies to Annuity only since Life is being replaced with IXN quotes.
- Allow the same document type, such as a product guide, to be uploaded for different states.
- Add logic for duplicate document types in one state - e.g. duplicate product guides for NY not allowed.
- Do not allow document upload when no states are selected.
- If a document type needs to be replaced, it must first be deleted, then uploaded again.

2 Display state specific quote documents

Display the quote product documents selected in the Admin Product Repository Product Documents dialog based on the selected jurisdictions in the quote wizard.

Acceptance Criteria

- Display the applicable product documents based on the states selected in the Admin Product Repository Product Documents dialog and the selected jurisdiction in the quote wizard.
- Verify documents appear for an uploaded document with a single selected state, such as Product Guide in New York.
- Verify documents appear for an uploaded document with multiple selected states, such as a Product Guide in Alabama, Colorado, and Idaho.
- Applies to Annuity only since Life is being replaced with IXN quotes.
- Verify duplicate document types in one state when uploaded in different state sets. For example, two product guides are uploaded for two different state sets and Arizona is in both. Show both Product Guide links on the quote page.
 - For example, state set one uploads Product Guide A in Arizona, California, and Maine. State set two uploads Product Guide B in Alaska, Arizona, and Delaware. In this example, there will be two Product Guide links on the quote page for Arizona.