INSURANCE TECHNOLOGIES

Signing Ceremony Updates - Additional Role Validation

FIRELIGHT BASE

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iConnect 255787 Design Approach - Signing Ceremony Updates - Additional Role Validation

Project Overview

In the December 2.22 release, signing jurisdiction validation was added for Owner and Joint Owner roles. For the February release, it has been requested to add the ability to select "State Signing Error" for all Signer Types. A new data item will be added for use in rules to control situations where specific signer types require validation to occur in lieu of validation on all activity signer types. An update to the email template will be made to accommodate the changes made to include all signer types available for the state signing error validation.

Impacts:

- Signing jurisdiction validation available for all Signer Type roles (as set in Admin) during the signing ceremony
- Admin: Forms Designer has available option for "State Signing Error" for all Signer Type roles
- Default Email Template: Updates to support all roles
- Validation for signer type roles based on use of new data item in rules; can override validation for specific signer types based on the roles present in the activity as written in rule

1 Signing Ceremony: Allow "State Signing Error" Selection for all Signer Types

In the Admin on the signature control, the "State Signing Error" is not currently available for any roles other than Owner and Joint Owner. This will be expanded to allow selection for all Signer Type roles.

Example using Insured - Before Enhancement:

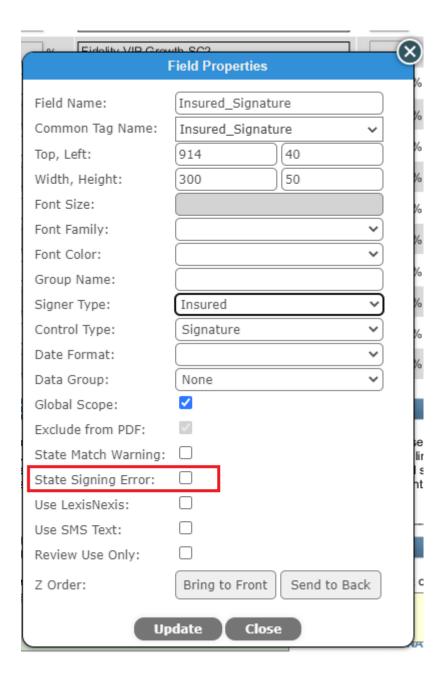After Enhancement:

Acceptance Criteria

- Signature control for all Signer Type roles allows selection of "State Signing Error".
- Default is unchecked/not selected for "State Signing Error".

2 Signing Ceremony Updates: Update Default Email Template

The default email template will be updated to reflect the changes to allow all Signer Types to select "State Signing Error".

Email Category: Activities

Email Template Type: Signature Submission Error

Email Subject Line: <APPLICATION_NAME> Status Update: Signing Error

Email Template: Invalid jurisdictions were selected during the owner/joint owner signing ceremony for <APPLICATION_NAME> as of <DATE_TIME>. The activity is incomplete and no longer valid.

New Email Template wording: Invalid jurisdictions were selected during the signing ceremony for one or more of the signing roles for <APPLICATION_NAME> as of <DATE_TIME>. The activity is incomplete and no longer valid.

Acceptance Criteria

- Default wording is updated for email template.
- Localization is applied to email template.

3   Signing Ceremony Updates: Validation of Signer Role Combinations

With the addition of the "State Signing Error" selection available for all Signer Types, a new common tag data item will be created to be used in rules for validation control. A rule can be written using, "FLI_DISABLE_STATE_SIGNING_ERROR" to indicate when Signer Type State Signing Errors would be overridden by the validation scenario.

Rules can be written to perform validation on specified signer types in desired scenarios - Validation scenario examples:

- When the Owner and Insured are different, validation occurs on the Owner role.
- When the Joint Owner and Joint Insured or Joint Annuitant are different, validation occurs on the Joint Owner role.
    - When there are Joint Owners, validation occurs on both owners only and not any insured/annuitant role.
- When the Owner and Insured are the same, validation occurs on the Insured role.

- When the Joint Owner and Joint Insured are the same, validation occurs on the Joint Insured role.

Note: Common tag will need to exist on the form or hidden form for the package and Rules will require Signer codes found in Admin: Branding: List Profile: SignerType.

Example:

Agent = 32

Annuitant = 4

Joint Annuitant = 6

Insured = 8

Joint Insured = 10

Owner = 16

Joint Owner = 18

Rule Samples:

Insured is Owner - Validation should be on INSURED

```
<if>
<condition>
<compare op="==">
<diget dataitemid="Insured_SameAsOwner" />
<const value="true" />
</compare>
</condition>
<diset dataitemid="FLI_DISABLE_STATE_SIGNING_ERROR">
<const value="16" type="String" />
```

```
</diset>

</if>
```

Insured is not Owner - Validation should be on OWNER

```
<if>

<condition>

<compare op="==">

<diget dataitemid="Insured_SameAsOwner" />

<const value="false" />

</compare>

</condition>

<diset dataitemid="FLI_DISABLE_STATE_SIGNING_ERROR">

<const value="8" type="String" />

</diset>

</if>
```

Acceptance Criteria

- New common tag data item is created for use in rules: FLI_DISABLE_STATE_SIGNING_ERROR
- Rules can be written using pipe delimiters for validation to occur on specific roles only when the State Signing Error is selected for all Signer Types.
- Multi-Sign is not negatively impacted when used in conjunction with the rules.