iConnect 131546 Design Approach

Application submit to carrier after one reviewer approves (manual review).

Workflow Changes

- Application will be automatically submitted after <u>any</u> manual reviewer approves.
- After any manual review approval, all other outstanding reviewer requests links will be disabled. A message will inform the reviewer that the application has been submitted.
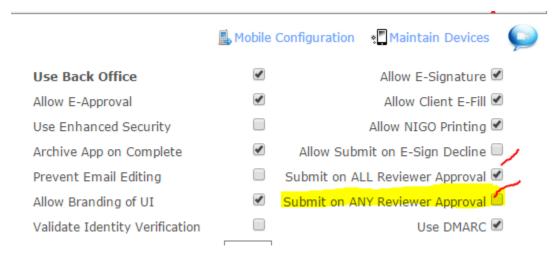
Features/Requirements

From Principal:

-When user sends application to multiple reviewers (manual review), and any one of those reviewers approve, the application is submitted to carrier
-If reviewer(s) access link to review application after approval, message will display to user

-Once application is approved and submitted by reviewer, status is updated to "Submitted" (Currently already implemented)
-When one reviewer approves application, confirmation email is sent to producer (Currently already implemented)
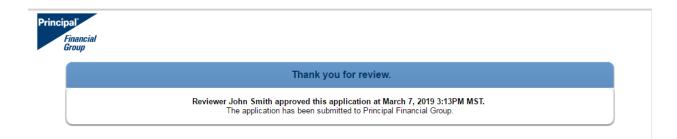
Admin Changes

New option checkbox on "Organization" tab:

- Currently there is already an option for "Submt on Reviewer Approval". Change the label to "Submit on ALL Reviewer Approval".
- Add a new option "Submit on ANY Reviewer Approval".
- These two checkboxes can not be both checked.

App Changes

- After any manual review approval, all other outstanding reviewer requests links will be disabled. A message will inform the reviewer *that "Reviewer John Smith approved the application at March 7, 2016 3:13PM MST. The application has been submitted to Principal Financial Group."*

Principal Financial Group

Thank you for review.

Reviewer John Smith approved this application at March 7, 2019 3:13PM MST.
The application has been submitted to Principal Financial Group.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- **Form Library**		
- **Design Forms**		
- **Profile Administration**	X	
- **Reports**		
- **Deployment**		
FireLight App		
- **New Application**		
- **Edit Application**		
- **Signature Process**		
- **Review Queue**		
- **Manual Review**	X	
- **User Preferences**		
- **Inbound Integration**		
- **Outbound Integration**		
- **PDF Generation**		
-		
FireLight Console		
- **Windows O/S**		
- **iOS**		
- **Android**		
-		
Other Systems		
- **DTCC Integration**		
- **Commission netting**		

- **Activity Reporting**		