

iConnect 125434 Design Approach

New functionality will send Emails to clients and the agent to inform them an application's pending client fill or signature request is about to expire. The requirement for the request warning is that there is a pending request that has less than the threshold days left before it expires.

Workflow Changes

No changes to the workflow

Features/Requirements

- Warning Threshold for expiring requests.
- New Client Email Templates for expiring client fill or signature requests
New Agent Email Templates for expired client fill or signature requests
- A process that checks daily for requests and applications that meet requirements for warnings.

Admin Changes

4 new email templates will be added to the email, localization and branding editor.

- Agent Request Expiration Warning Email Template – an email that is sent to the agent warning them that that the client link is about the expire
- Client Request Expiration Warning Email Template – an email that is sent to the client warning them that that the client link is about the expire
- Agent Request Expired Email Template – email that is sent to the agent when the link has expired. Instructions can be provided to the agent indicating what should happen next. Example, instruct them to send the link again or gather wet signatures
- Client Request Expired Email Template - email that is sent to the client when the link has expired. Example, instruct them to contact the agent

A settable warning threshold will be added to the organization tab.

App Changes

N/A

UI Mock Ups

Warning threshold

The screenshot displays a web application for managing organizations. The top navigation bar includes a search icon, a link to "Add New Organization", and a list of organizations. The main content area is divided into three sections: a left sidebar for organization details, a central form for configuration, and a right sidebar for additional settings.

Organizations List:

Organization Name	Status
Insurance Technologies	X
IT Brokers	X
John Hancock	X
Lincoln Financial Group	X
Massachusetts Mutual Life Insurance Company	X
Matrix Insurance	X
MetLife	X
Nationwide Life Insurance Company	X
New York Life	X
Ohio National	X

Organization Details (Left Sidebar):

- Organization Name: Insurance Technologies
- Organization Type: Carrier
- Country: USA
- DTCC Member ID: 000123
- Company Rating: AAA++
- External Map Code: IT
- Admin Site Signout URL: ThankYou
- App Signout URL Type: ThankYou
- App Site Signout URL: FireLight#123
- Shared Key: 2 S. Cascade Ave. #200 Colorado Springs, CO 80903
- Support Address: 719-442-6400
- Support Phone: info@go.com
- Support Email: ALL
- Data Partition: None
- Edit Masks: Add
- Signature Fonts: Click to Edit

Configuration (Center Form):

- Use Back Office: ☒
- Allow E-Approval: ☒
- Use Enhanced Security: ☐
- Archive App on Complete: ☒
- Prevent Email Editing: ☒
- Allow Branding of UI: ☒
- Validate Identity Verification: ☐
- Requests Timeout: 15 days (0 for never)
- Purge Uncompleted Apps: 0 days (0 for never)
- Purge Completed Apps: 0 days (0 for never)
- Expiration Warning Threshold: 0 days (0 for never) ← Red arrow points here
- 1228 Validity Window: 0 minutes
- Policy Block Settings: Click to Edit
- Authentication Timeout: 0 minutes (0 for default)
- IDP Identifier: firelight_idp_test
- IDP Certificates (primary): Click to Edit
- IDP Certificates (backup): Click to Edit

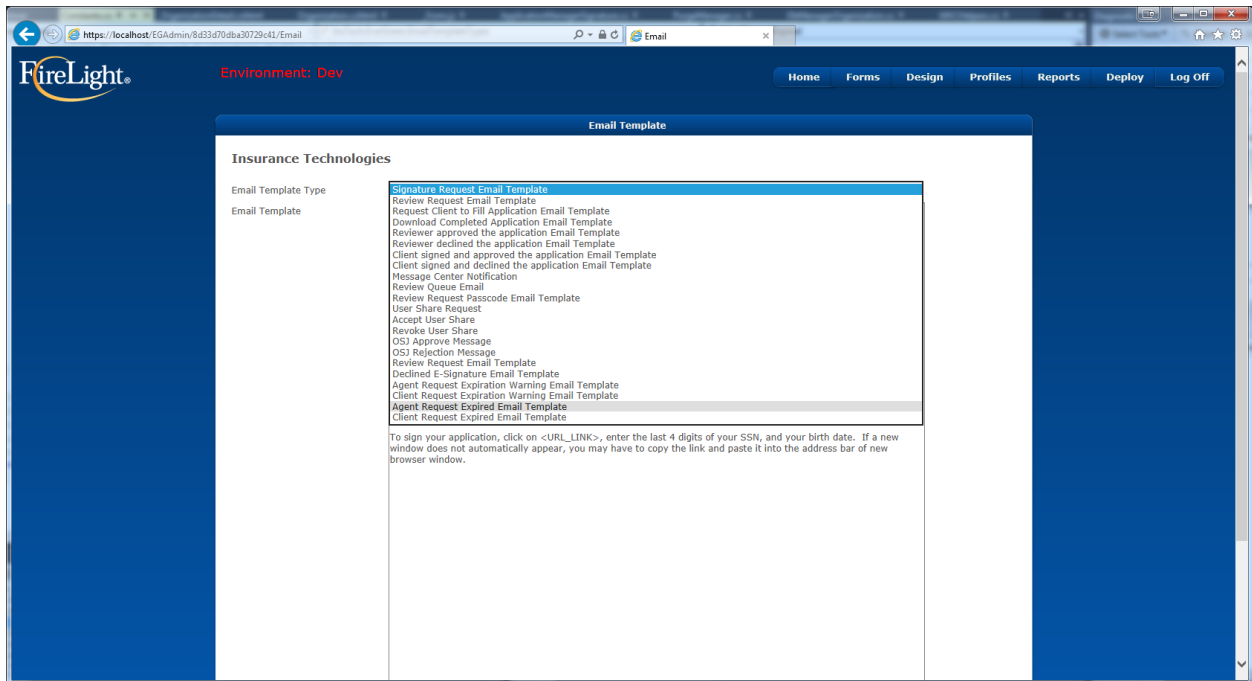
Additional Settings (Right Sidebar):

- Allow E-Signature: ☒
- Allow Client E-Fill: ☒
- Allow NIGO Printing: ☐
- Allow Submit on E-Sign Decline: ☒
- Submit on Reviewer Approval: ☐
- Use DMARC: ☒

Buttons:

- Mobile Configuration
- Maintain Devices
- Save Organization

Email Editor:



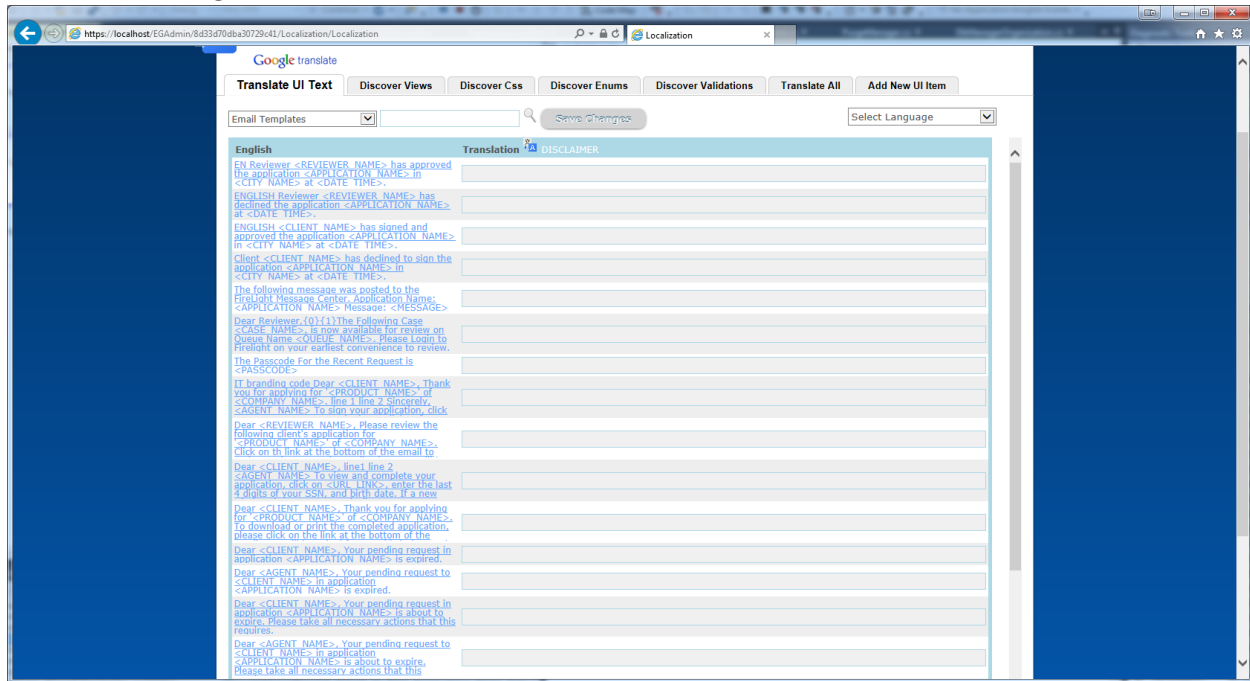
The screenshot shows the FireLight web application interface. The top navigation bar includes links for Home, Forms, Design, Profiles, Reports, Deploy, and Log Off. The main content area is titled "Email Template" and "Insurance Technologies". It contains a form with two fields: "Email Template Type" set to "Agent Request Expiration Warning Email Template" and "Email Template" containing the text: "Dear <AGENT_NAME>," followed by "Your pending request to <CLIENT_NAME> in application <APPLICATION_NAME> is about to expire. Please take all necessary actions that this requires."

Branding Email Templates:

The screenshot shows the "Custom Branding for Insurance Technologies" page. It features a table with two columns: "Key" and "UI Text". The table lists various email templates and their corresponding UI text, including review requests, application approvals, and expiration warnings. The text is formatted with placeholders like <REVIEWER_NAME>, <APPLICATION_NAME>, and <CLIENT_NAME>.

Key	UI Text
5 - Reviewer approved the application Email Template	EN Reviewer <REVIEWER_NAME> has approved the application <APPLICATION_NAME> in <CITY_NAME> at <DATE_TIME>.
6 - Reviewer declined the application Email Template	ENGLISH Reviewer <REVIEWER_NAME> has declined the application <APPLICATION_NAME> in <CITY_NAME> at <DATE_TIME>.
7 - Client signed and approved the application Email Template	ENGLISH <CLIENT_NAME> has signed and approved the application <APPLICATION_NAME> in <CITY_NAME> at <DATE_TIME>.
8 - Client signed and declined the application Email Template	Client <CLIENT_NAME> has declined to sign the application <APPLICATION_NAME> in <CITY_NAME> at <DATE_TIME>.
9 - Message Center Notification	The following message was posted to the FireLight Message Center. Application Name: <APPLICATION_NAME> Message: <MESSAGE>
10 - Review Queue Email	Dear Reviewer, (01/41) The Following Case, <CASE_NAME>, is now available for review on Queue Name <QUEUE_NAME>. Please Login to Firelight on your earliest convenience to review.
11 - Review Request Passcode Email Template	The Passcode For the Recent Request Is: <PASSCODE>
0 - Signature Request Email Template	IT branding code Dear <CLIENT_NAME>, Thank you for applying for "<PRODUCT_NAME>" of <COMPANY_NAME>. Line 1 Line 2 Sincerely, <AGENT_NAME> To sign your application, click on <URL_LINK>, enter the last 4 digits of your SSN, and your birth date. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of new browser window.
1 - Review Request Email Template	Dear <REVIEWER_NAME>, Please review the following client's application for "<PRODUCT_NAME>" of <COMPANY_NAME>. Click on the link at the bottom of the email to review and approve the application. You will be asked to acknowledge your acceptance of the disclosure terms and consents. The instruction for completing your Electronic Signature will be provided as well. Please use the Passcode to login. I will be providing this Passcode via phone or a separate email. If you have questions please feel free to contact
2 - Request Client to Fill Application Email Template	Dear <CLIENT_NAME>, line 1 line 2 <AGENT_NAME>. To view and complete your application, click on <URL_LINK>, enter the last 4 digits of your SSN, and birth date. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of new browser window.
4 - Download Completed Application Email Template	Dear <CLIENT_NAME>, Thank you for applying for "<PRODUCT_NAME>" of <COMPANY_NAME>. To download or print the completed application, please click on the link at the bottom of the email. You will be asked for your birth date and the last 4 digits of your social security number. If you have questions please contact your producer. To download or print your completed application, click on <URL_LINK>, enter the last 4 digits of your SSN, and birth date. If a new window does not automatically
22 - Client Request Expired Email Template	Dear <CLIENT_NAME>, Your pending request in application <APPLICATION_NAME> is expired.
21 - Agent Request Expired Email Template	Dear <AGENT_NAME>, Your pending request to <CLIENT_NAME> in application <APPLICATION_NAME> is expired.
20 - Client Request Expiration Warning Email Template	Dear <CLIENT_NAME>, Your pending request in application <APPLICATION_NAME> is about to expire. Please take all necessary actions that this requires.
19 - Agent Request Expiration Warning Email Template	Dear <AGENT_NAME>, Your pending request to <CLIENT_NAME> in application <APPLICATION_NAME> is about to expire. Please take all necessary actions that this requires.
18 - Declined E-Signature Email Template	Dear <AGENT_NAME>, You have elected to decline E-Signature for the application <APPLICATION_NAME>. Please collect all application signatures manually before submitting the application electronically.
17 - Review Request Email Template	Dear <REVIEWER_NAME>, Please review the following applications. Click on the link at the bottom of the email to review and approve the application. You will be asked to acknowledge your acceptance of the disclosure terms and consents. The instruction for completing your Electronic Signature will be provided as well. Please use the Passcode to login. I will be providing the Passcode via phone or a separate email. If you have questions please feel free to contact me. Sincerely, <AGENT_NAME> To
16 - OSI Rejection Message	This submitted application has been rejected and was not released to the carrier. To Resubmit: 1.Copy App 2. Make Corrections 3. Resubmit. App. Line rejection reasons posted below.

Localization changes:



Areas Impacted

System Area	Yes	Comment
Admin Tool	x	Options in organization will be modified.
- Form Library		
- Design Forms		
- Profile Administration	x	Email Template will be added.
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
-		
FireLight Console		
- Windows O/S		
- iOS		

- Android		
-		
Other Systems		
- DTCC Integration		
- Commission netting		
- Activity Reporting		