
Show Signatures on (soft limit) Addendum Documents

FIRELIGHT BASE

FireLight[®]

Platform

SHOW SIGNATURES ON (SOFT LIMIT) ADDENDUM DOCUMENTS

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Insurance Technologies, LLC

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iConnect 251899 Design Approach - Show Signatures on (soft limit) Addendum Documents

Project Overview

Addendum documents are included with the new business package when soft limits are set and exceeded at a field level. Clients have requested addendums to include signatures for the same signer roles as the corresponding form. The addendums will be displayed for acknowledgement and signature capture during the signing ceremony, immediately following the corresponding/original form. This new feature will be a system wide implementation and will not feature a setting for users to determine if signatures will be included on the addendum documents. All the signature fields placed on a form will also be shown at the bottom left of the last page of the Addendum document.

Impacts:

1. FL App -> Activity -> Other Actions -> Display/Print PDF: Signature(s) and signed date will be stamped on Addendum document same as the original form.
2. FL App -> Activity -> Signatures: Addendum document will also be presented for signature along with its form.
3. FL App -> Review Queue: Links "Application History" and "Audit Report" will show audit history of signatures on addendum document like other forms at the time of signing ceremony.
4. Addendum pages: Potential for additional addendum pages if the signatures do not fit on the original addendum document

1 Add Signature and Signed Date fields on Form Addendum

To show signatures on Form Addendums, the Addendum document will have the signature field along with the Signed Date added of the same signer type(s) as that of its original form. These signature fields will be stacked from top to bottom and will be placed at the bottom left of the document. The signature fields will be labeled to identify signer type based on the form signature control. The signed date fields will be adjacent to the signature field.

Based on above specifications, highlighted section on below mockup shows the placement of signature fields on addendum document. Signature fields from its original form will be stacked on the addendum document in the order of top to bottom and then left to right. Signature fields on the Addendum will have a standard width and height fixed to 300 x 50 (in pixels).

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Conditions:

- If the text in Addendum document overflows more than one page, in that case signature field(s) will show at the last page.
- In the event the Addendum does not have enough space left on the page to show signature(s) at the bottom of the page, the signatures will overflow onto another addendum page.
- If another page is necessary for the addendum to display all signatures, the addendum will not be labeled any differently from the original addendum.
- In case multiple copies are generated for the form using Form Index property, all the addendums of each of the form copy will show same signature fields as the corresponding form.

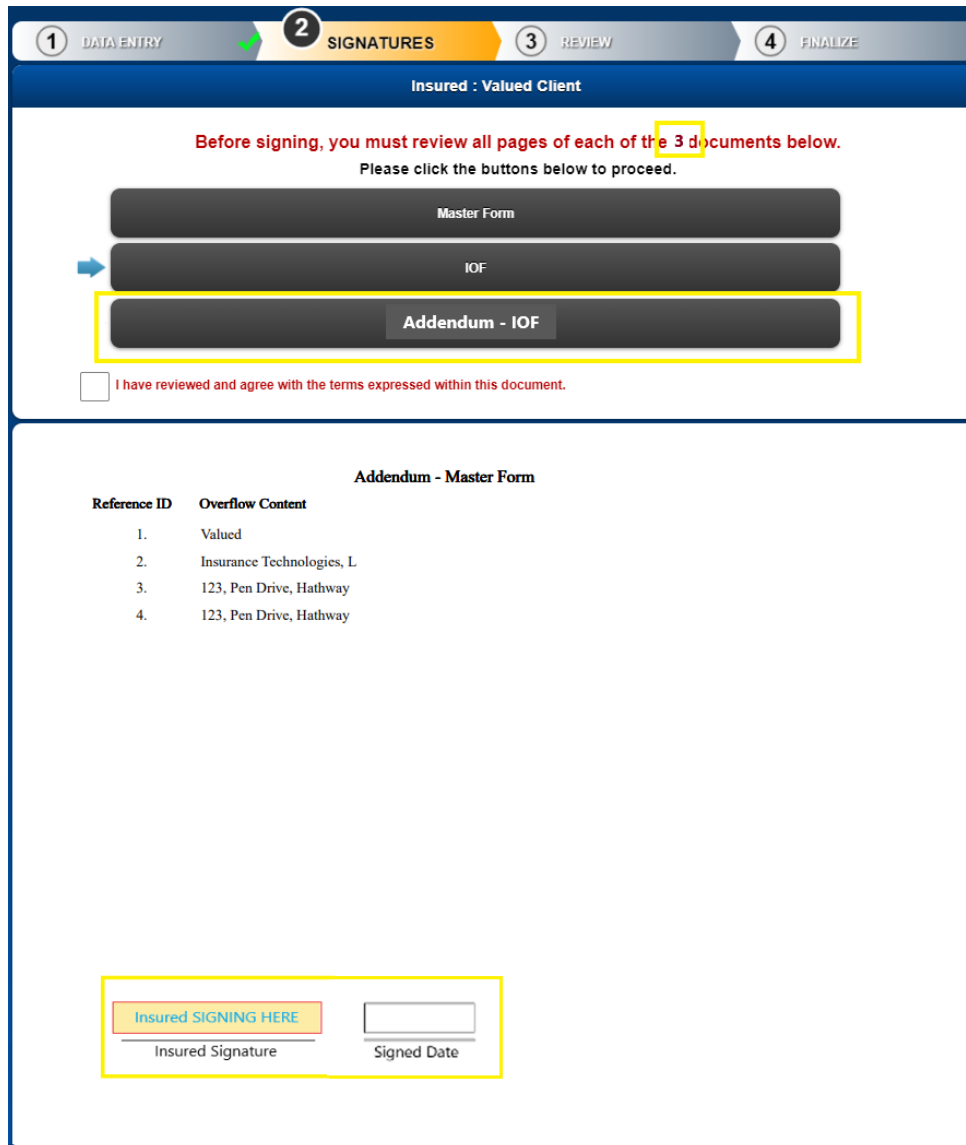
Acceptance Criteria

- Same signature(s) (signer types including "Agent") show on the addendum document as available on the corresponding/original form.
- Signature(s) show at the bottom left side of the last page of the Addendum document.
- Signed Date fields are displayed adjacent to the signature fields.
- Labels for all signature types are shown under the stamped signature. Labels are based on the signature controls of the corresponding form.
- Size of the signature field(s) on Addendum document are same as on its original form.
- If there are Signature Initials field(s) present on the form they do not appear on the addendum document (before or after or at the time of signing ceremony).
- Addendum document also appears at the signing ceremony for Agent signing.

2 Present Addendum Document for Signature

To enable signature display on the form addendums, Addendum Documents will also be presented at the time of signing ceremony along with the other forms. The Addendum document will be presented immediately after the corresponding form.

Below mockup shows the screen where addendum document will appear for signature. Highlighted sections show the enhancements to add the signatures and signed date to the addendum documents.



1 DATA ENTRY **2 SIGNATURES** **3 REVIEW** **4 FINALIZE**

Insured : Valued Client

Before signing, you must review all pages of each of the 3 documents below.

Please click the buttons below to proceed.

Master Form

IOF

Addendum - IOF

☐ I have reviewed and agree with the terms expressed within this document.

Addendum - Master Form

Reference ID	Overflow Content
1.	Valued
2.	Insurance Technologies, L
3.	123, Pen Drive, Hathway
4.	123, Pen Drive, Hathway

Insured SIGNING HERE

Insured Signature

Signed Date

In cases where multiple form copies are generated using Form Indexing, each of the Addendum documents for those form copies will be presented for signature immediately after the original form.

For example, in below mockup form Application222 Copy has 4 copies added to the package using the Form Index property. The addendums for these forms will be presented immediately after the forms.

1 DATA ENTRY

2 SIGNATURES

3 REVIEW

4 FINALIZE

Owner : Valued Customer

Before signing, you must review all pages of each of the 5 documents below.

Please click the buttons below to proceed.

➔

TEMPLATE UPLOAD TEST

Application222 Copy1

Addendum - Application222 Copy1

Application222 Copy1 2

Addendum - Application222 Copy1 2

Application222 Copy1 3

Addendum - Application222 Copy1 3

Application222 Copy1 4

Addendum - application222 Copy1 4

☐
I have reviewed and agree with the terms expressed within this document.

TEMPLATE UPLOAD TEST - Page 1 of 3

Acceptance Criteria

- Addendum document is presented for signature immediately after the corresponding form.
- Signature field(s) on addendum document display on the bottom left of the last page.
- Signed Date field(s) will display adjacent to each of the Signature field(s).
- If there are Signature Initials field(s) present on the form they do not appear on the addendum document (before or after or at the time of signing ceremony).
- Addendum document also appears at the signing ceremony for Agent signing.

3 Add changes to Audit History

View History:

Link "View History" for an app on All Activities page. Stamping of signatures on the addendum document will be recorded in the Audit History at the time of application processing.

The screenshot shows a window titled "History" with a list of events. A yellow box highlights the following events:

- In Signatures** Form 'Master Form' selected.
Form Selected
11/24/2021 5:33:06 AM EST
- In Signatures** Document 'Addendum - IOF' acknowledged.
Form Acknowledged
11/24/2021 5:33:02 AM EST
- In Signatures** Page 1 of document 'Addendum - IOF' displayed.
Page Displayed
11/24/2021 5:33:01 AM EST
- In Signatures** Document 'Addendum - IOF' selected.
Form Selected
11/24/2021 5:33:01 AM EST

Below the highlighted events, the following event is visible:

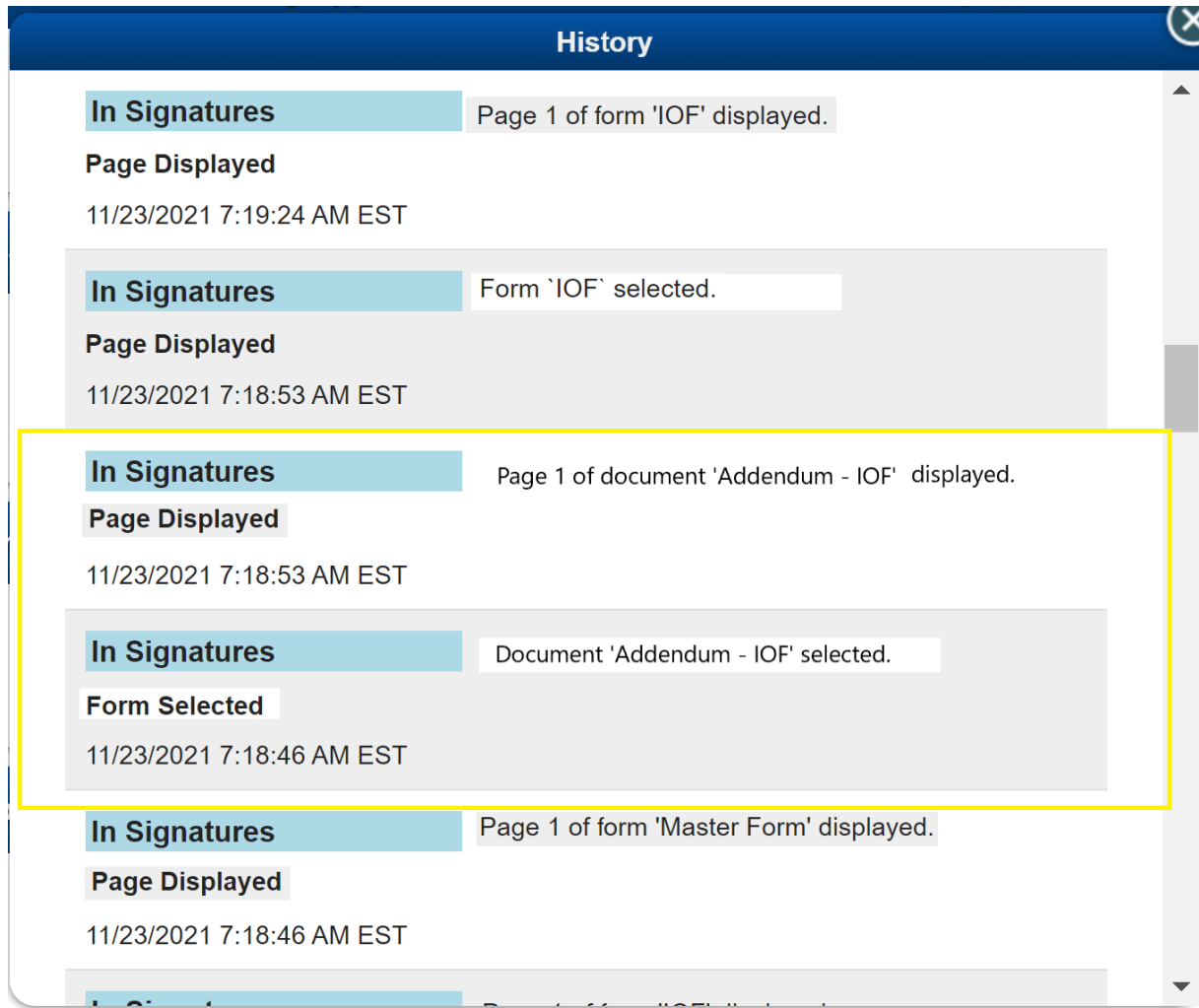
- In Signatures** Form 'IOF' acknowledged.
Form Acknowledged
11/24/2021 5:32:36 AM EST

Audit Report:

Link 'Audit Report' on Review Queue screen.

Application History:

Link 'Application History' on Review Queue screen.



History	
In Signatures	Page 1 of form 'IOF' displayed.
Page Displayed	11/23/2021 7:19:24 AM EST
In Signatures	Form 'IOF' selected.
Page Displayed	11/23/2021 7:18:53 AM EST
In Signatures	Page 1 of document 'Addendum - IOF' displayed.
Page Displayed	11/23/2021 7:18:53 AM EST
In Signatures	Document 'Addendum - IOF' selected.
Form Selected	11/23/2021 7:18:46 AM EST
In Signatures	Page 1 of form 'Master Form' displayed.
Page Displayed	11/23/2021 7:18:46 AM EST

Acceptance Criteria

- Stamping of signature on the addendum document is recorded to the Audit History on App and Review Queue pages.
- View History captures signing for addendums.