INSURANCE TECHNOLOGIES

Fillable PDF Outside of FireLight

FIRELIGHT BASE

FireLight®

Platform

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Table of Contents

iConnect 242368 Design Approach - Fillable PDF Outside of FireLight

Project Overview

The Print Forms activity in FireLight allows clients to access forms with fillable fields and submit using an alternate method of submission other than e-Application. Currently, the forms are only fillable while in FireLight. If the user saves the form PDF, the forms are no longer fillable outside of FireLight. This enhancement request will provide clients with the ability to allow downloaded Print Forms to be saved and filled outside of FireLight. Fillable fields pre-filled prior to saving the forms outside of FireLight will remain editable; data will not be locked down/stamped on the form.

Impacts:

Print Forms - Ability to save and fill the PDF forms outside of FireLight.

If the forms have a dynamic dropdown list/combo box/checkbox, rules, etc. that drive form field selections, the available selections will be based on the options available at the time the forms are saved outside of FireLight

1 WS WO ZWS-W-0018: Generate Editable PDF for Print Forms Activity

PDF Forms accessed via Print Forms in FireLight have a digital certificate applied once they are moved into the print queue. The digital certificate prevents users from filling forms outside of FireLight.

With the enhancement to allow FireLight Print Forms to be downloaded and edited outside of FireLight, the PDFs need to be generated as an editable version. The Digital Certificate for Print Forms saved as PDFs will be removed for clients to provide the ability to save and fill the unsigned forms outside of FireLight.

All fields will be editable outside of FireLight, regardless of data/fields edited while in FireLight. This could result in the appearance of "double tags" due to tag formatting based on selection. Example: SSN vs. TIN text box based on ownership type; form may appear to have two text boxes for the SSN/TIN entry. Best practice for a Forms Developer in this instance would be to have the fields slightly askew for the user to select the appropriate formatted field for their entry.

If data is populated in fields within FireLight, the fields will remain editable outside of FireLight and will not be locked down or stamped on the form.

Following properties will be supported by Editable PDF Forms:

- Text Box
    - Max Length
    - Font size
    - Font Family
    - Font color
    - Text alignment
    - Background
    - Is Password
- Checkbox
    - Print border
- Radio Button
    - Print border
    - Border Styling
- Drop Down
    - Font Size
    - Font Family
    - Font color
    - List Name Values

Groups will require export values within a same group name to be consistent for radio buttons to work as expected. Example: If export values are "Yes" for some and the field name for others in the same group, the radio button selections will not function as expected. The export values must remain consistent, so either all of them are "Yes" values or the field name values.

The ideal way to set export value are as follows:

<u>Recommended</u>

Option	Export value
IRA	IRA
SEP IRA	SEP IRA
403(b)	b_403
Roth IRA	RothIRA
SIMPLE IRA	SimpleIRA

457 (B)	b_457

OR

Option	Export value
IRA	yes
SEP IRA	yes
403(b)	yes
Roth IRA	yes
SIMPLE IRA	yes
457 (B)	yes

A setup example to avoid:

Option	Export value
IRA	IRA
SEP IRA	yes
403(b)	Yes
Roth IRA	RothIRA
SIMPLE IRA	yes
457 (B)	yes

Acceptance Criteria

- Clients with a license for FireLight Print Forms can access fillable PDFs without additional settings.
- PDFs downloaded/saved using the "Print" option in FireLight Print Forms can be edited outside of FireLight.
- Field Data/dropdown selections entered while in FireLight (prior to download) can be edited in the downloaded/saved form version outside of FireLight.
- Dropdown/combo boxes on PDFs offer selections based on the time the PDF is rendered.
- Display/Print PDF is not negatively impacted for other activities.
- Properties supported for fillable PDF outside of FireLight:

- Text Box
  - Max Length
  - Font size
  - Font Family
  - Font color
  - Text alignment
  - Background
  - Is Password
- Checkbox
  - Print border
- Radio Button
  - Print border
  - Border Styling
- Drop Down
  - Font Size
  - Font Family
  - Font color
  - List Name Values
- If no custom font color, size, style, etc. are selected, the font properties will default to black font with a transparent background.