
Carrier testing as if they are a Distributor

FIRELIGHT BASE

FireLight®

Platform

CARRIER TESTING AS IF THEY ARE A DISTRIBUTOR

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Insurance Technologies, LLC

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Design Approach - Carrier testing as if they are a Distributor

Provide a means for carriers to have visibility of and thereby support testing in a distributor's environment. Currently, carriers have no visibility of potential issues caused by rule conflicts between carrier forms and distributor forms.

Create an App side testing view into the Distributor Organization so that the carrier can test on behalf of distribution that have an active selling agreement and have enabled carrier testing view. This will function very similar to the FL IT login that has a drop-down for all the organizations. The difference will be that the drop down will be on the App side and it will be a Carrier logging into a Distributor that has granted access.

Carrier Testing Impacts:

- Admin setting to activate Carrier Testing, group code must be defined for the transition into the distributor environment.
- Admin group code for the carrier to activate the testing view
- UI change in Carrier App side to select the distributor

1 Admin: Carrier testing as if they are Distributor

Admin setup side to enable a carrier to test forms, wizards and distributor functionality on behalf of a distributor. There are admin setting to enable the support at both the carrier and distributor side.

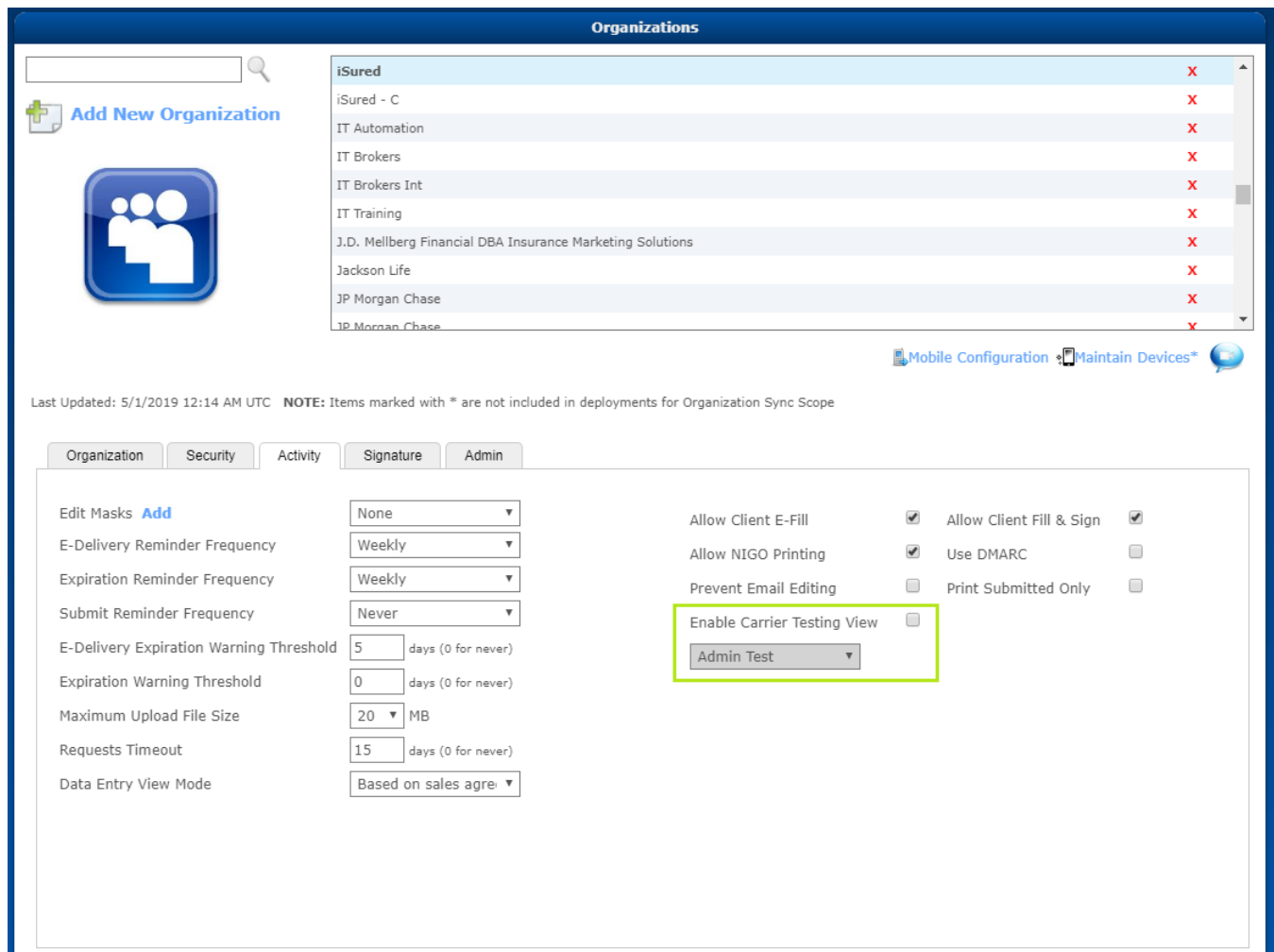
1.1 Admin: Allow Carrier testing for the Distributor through Organization Setting

Admin:

Create an option to the Organization setting (for Distributors only) that will allow Carrier Testing entitled "Enable Carrier Testing View".

When Enable Carrier Testing View is selected, enable a drop down to select the Group to use when the Carrier is testing. Note that only group options will be used from this group. Product and Activity Access will be auto generated for the Carrier.


If the Carrier testing is selected, then a Group must be selected.



Organizations

Search:

[Add New Organization](#)



Organization	
iSured	X
iSured - C	X
IT Automation	X
IT Brokers	X
IT Brokers Int	X
IT Training	X
J.D. Mellberg Financial DBA Insurance Marketing Solutions	X
Jackson Life	X
JP Morgan Chase	X
JP Morgan Chase	X

[Mobile Configuration](#) [Maintain Devices*](#)

Last Updated: 5/1/2019 12:14 AM UTC **NOTE:** Items marked with * are not included in deployments for Organization Sync Scope

Organization Security Activity **Signature** Admin

Edit Masks [Add](#)

E-Delivery Reminder Frequency: Weekly

Expiration Reminder Frequency: Weekly

Submit Reminder Frequency: Never

E-Delivery Expiration Warning Threshold: 5 days (0 for never)

Expiration Warning Threshold: 0 days (0 for never)

Maximum Upload File Size: 20 MB

Requests Timeout: 15 days (0 for never)

Data Entry View Mode: Based on sales agre

Allow Client E-Fill: ☒ Allow Client Fill & Sign: ☒

Allow NIGO Printing: ☒ Use DMARC: ☐

Prevent Email Editing: ☐ Print Submitted Only: ☐

Enable Carrier Testing View: ☒

Admin Test

Acceptance Criteria

- Distributor setting: Enable Carrier testing appears in the Organization view

- Once Enable carrier testing is selected, Group Selection Drop down will enable and an option must be selected
- Only group options from this group can be used
- Product and Activity Access will be auto generated for the Carrier
- Only available for distributor. Carriers will not have this option


1.2 Admin: Setting Carrier group

Admin: An additional setting is needed in the carrier group to enable the view. The carrier would not want every admin to have that drop down so this check box will enable the view into organizations that are enabled by the distributor and set as active in the selling agreement.

Groups - Insurance Technologies

Groups

Create New



Name	TC Role Code	
Admin Test	Admin	X
BASEIT	External Role Code2	X
Date Override	DO	X
Devel	TEST8	X
Embedded Testing Group	EmbeddedTest	X
FilterTest	FilterTest	X
For IT2	IT2Only	X
For IT3	IT3	X
GRole	GRole	X

Last Updated On : 09/19/2019 08:22:33 UTC

Name

Admin Test

Illustration Services Role Code

TC Role Codes

Admin

App

Admin

Review Queue

Activity Access

Product Access

Case Access

Review Queue Access

Needs Filter

Debugging Tools

☐ Disable Send Email Request
 ☐ Optional Client Email

Menu Options
☐ Disable Edit Preferences
 ☐ Disable Log Off
 ☐ Enable CRM Preferences
 ☐ Enable Training

Notifications
☐ Enable Form Changes Notifications
 ☐ Enable Use Screen Notification

Obfuscation/Screen Security
☐ Enable Obfuscation
 Timeout: seconds (0 for None)

Other Actions
☐ Disable Show Annotations
 ☐ Disable View Activities Summary

Quote
☐ Enable Annuity Quotes
 ☐ Enable Life Quotes

Share/Transfer/Case Access
☐ Allow Activity Share
 ☐ Allow Transfer Activity
 ☐ Case Access by Firm ID
 ☐ Enable All Activities User Share

Signing: General
☐ Agent Not Required to View All Pages
 ☐ Allow Edits to Mobile
 ☐ Disable Decline E-Sign
 ☐ Disable Signing as Agent
 ☐ Disable Signing as Client
 ☐ Disable Signing Until All Pages Viewed
 ☐ Disable Sign Now
 ☐ Enable Single User to Sign Multi Signer Types

Testing
☐ Enable Create Benchmarks
 ☐ Enable Test Mode
 ☐ Enable Override Date
 ☐ Enable View Benchmarks
 ☐ Enable Distributor Testing View

User Rights Home/All Activities
☐ Disable Copy Activities
 ☐ Disable Delete Activities
 ☐ Disable Editing Other Users' Activities
 ☐ Require Entry of Activity Name
 ☐ Disable Home Screen
 ☐ Disable Save Activities
 ☐ Disable View Activities
 ☐ Disable View Activity List

Save

Acceptance Criteria

- Setting appears in the group set
- Setting can be enabled per group
- This update will occur in UAT only.

2 App: Carrier testing as if they are Distributor

User will have the Distributor testing view drop-down enabled when the settings in the admin tool are applied correctly. These settings will allow the user to see the Distributor selected through the Organization and group setting in the admin.

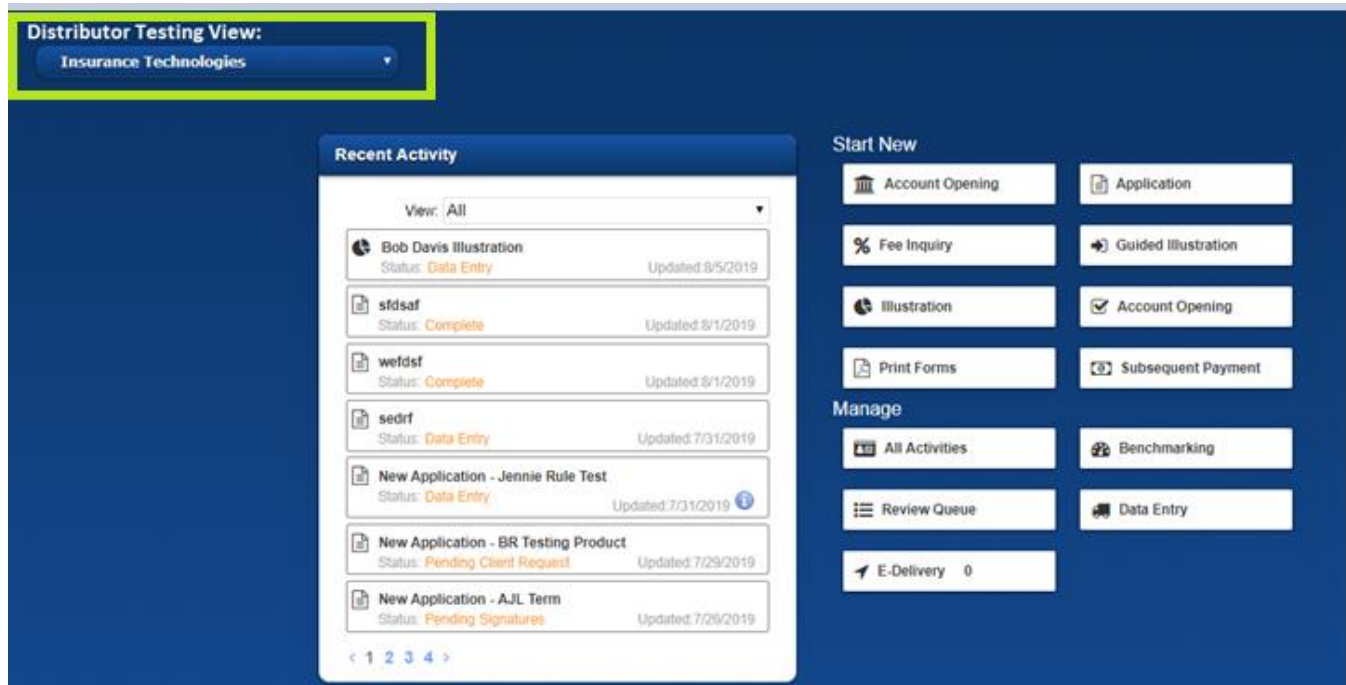
Carrier can submit application using the Distributor testing role code and the outbound submission (App/Sub or 103 or Name Value Pairs) will be sent. This will allow carriers to do full end to end testing on the distributor and make sure the outbound files are correct.

2.1 App: Settings

Honor the settings in the admin so that the distributors that have enabled Carrier Testing are available in the drop-down. This list should only include distributors that the Carrier has selling agreements with. The carrier user that is logged in has the group access (Enable Distributor View) to see the drop-down. Only the admins that have the group setting (Enable Distributor View) will see the drop-down. This drop-down field should be named Distributor Testing View as opposed to IT Vendor.

When the carrier logs in, they will have the carrier role code, but the distributor role code is what manages product and activity access. BUT when logged into the Distributor environment the carrier cannot/should not see other carrier products in their testing view.

So, FL will need to honor the new distributor setting to enable the carrier testing view for their testing role code. Then, when the carrier selects the distributor login, the carrier will only see their carrier products and activities listed.



Acceptance Criteria

- Carrier setting: Admins that have the proper Group setting will have access to view the enabled drop-down entitled "Distributor Testing View"
- This update will occur in all environments EXCEPT Prod.
- When the carrier logs in, they will have the distributors listed that have Carrier Testing enabled.
- This is available in all environments except Prod.

2.2 App: Submission of outbound feeds

Carrier can submit application using the Distributor testing role code and the outbound submission (App/Sub or 103 or Name Value Pairs) will be sent. This will allow carriers to do full end to end testing on the distributor and make sure the outbound files are correct.

Acceptance Criteria

- Carrier logs into FL using their role code and select test Distributor X.
- Carrier can now test the distributor using the distributor testing role code and get an app to submission.
- the submission should work just like it was a distributor submitting the application. (It will use the provider settings to send the outbound submission (App/Sub or 103 or Name Value Pairs) will be sent.

2.3 App: Carrier redirects to Distributor environment

When a Distributor is selected in the Carrier environment, we need to redirect to the selected Distributors environment using a predefined internal role code selected in the Admin. This re-direct call will be done by calling the UserManager with GetSystemUser method. The method itself sets up a new user if one doesn't already exist for the carrier to distributor logic. This user's username will be the same as the carrier's user name but have a different external role code. This role code will be a combination of the carrier external role code, "_U+FFFF_", and the carrier organization ID. The User also will have a new variable called CarriedID. The carrier id is the organization id of the original carrier.

Acceptance Criteria

- This update will occur in all environments except Prod.
- The carrier role code will be used to see the dropdown list, but the distributor role code will be used to manages product and activity access.
- The carrier cannot/should not see other carrier products in their testing view.
- only activities in the distributor testing role code will be visible (again, with only the logged in carrier products)
- When Carrier is logged into the Distributor environment the Distributor Testing View drop down will include the Carrier in order to redirect back to the Carrier environment.
- When Carrier is logged into the Distributor environment the Distributor Testing View drop down will include Distributor that is currently viewed.

2.4 App: Login with Carrier Testing

When logging into the Distributor environment, the Organization must be a Distributor and allow Carrier testing if the FL_CARRIER_TESTING role is specified. If this does not occur, then the login will fail.

Acceptance Criteria

- If FL_CARRIER_TESTING role is not specified, login for the Distributor Organization to allow Carrier testing will fail.

2.5 App: Determine how the Carrier is identified from the user

When using the FL_CARRIER_TESTING role, Fire Light base will assume all group options from the distributor's role code and allow access to ONLY the Carriers products and all Activities. We will need to determine how the Carrier is identified from the user. This means that whenever we get the

FinalUserGroup we recognize the FL_CARRIER_TESTING role and build the Product and Activity access accordingly.

Acceptance Criteria

- FinalUserGroup will recognize the FL_CARRIER_TESTING role and build the Product and Activity access accordingly

2.6 App: Redirecting back to Distributor or Carrier

When a Carrier is logged into a Distributor with the specified role code, we will provide a dropdown on the home view, which contains the list of Distributors the Carrier have access to. Selecting an Organization in this list will either redirect to the Distributor or go back to the Carrier. For this scenario, we will need to retain the original Role Code when redirecting back to the Carrier environment.

Acceptance Criteria

- Selecting an Organization will redirect back to the carrier by retaining the original role code.
- This update will occur in all environments except Prod.

2.7 App: Create Setting on Distributor to set role code for carrier login

When the carrier logs in, they will have the carrier role code, but the distributor role code is what manages product access. BUT, the carrier cannot/should not see other carrier products in their testing view.

So, FL will need a new distributor setting to enable the carrier testing view for the role code. Then, when the carrier selects the distributor login, the carrier will only see their carrier products listed.

Acceptance Criteria

- a new distributor setting is available to enable the carrier testing view for the role code.
- when the carrier selects the distributor to test, the carrier will only see their carrier products listed in the app.
- when the carrier selects the distributor to test, the carrier will only see the activities that have permission to test per the role code.