FireLight Helpful Implementation Options

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FireLight Helpful Implementation Options

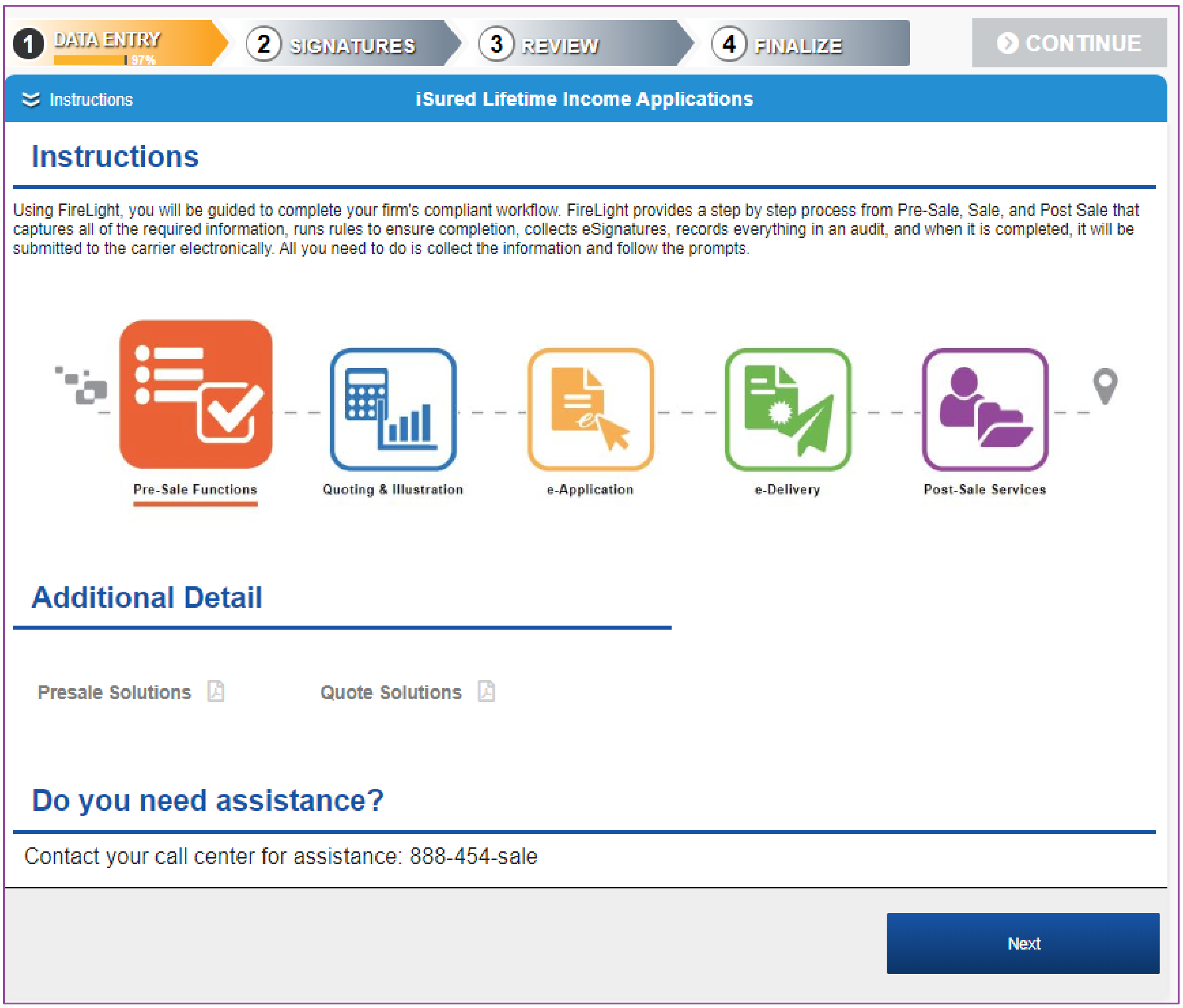
The following topics include some helpful FireLight® implementation options for carriers and distributors.

1 Introduction Page

1.1 Introduction page – carriers or distributors may create an introduction page. This page can include details on the process the agents will be completing, details on the product, or both.

1.2 Include Links to Product Guides, Training, etc.

1.3 Include contact phone number for questions.



2 Include Helpful Links to Guide Agents

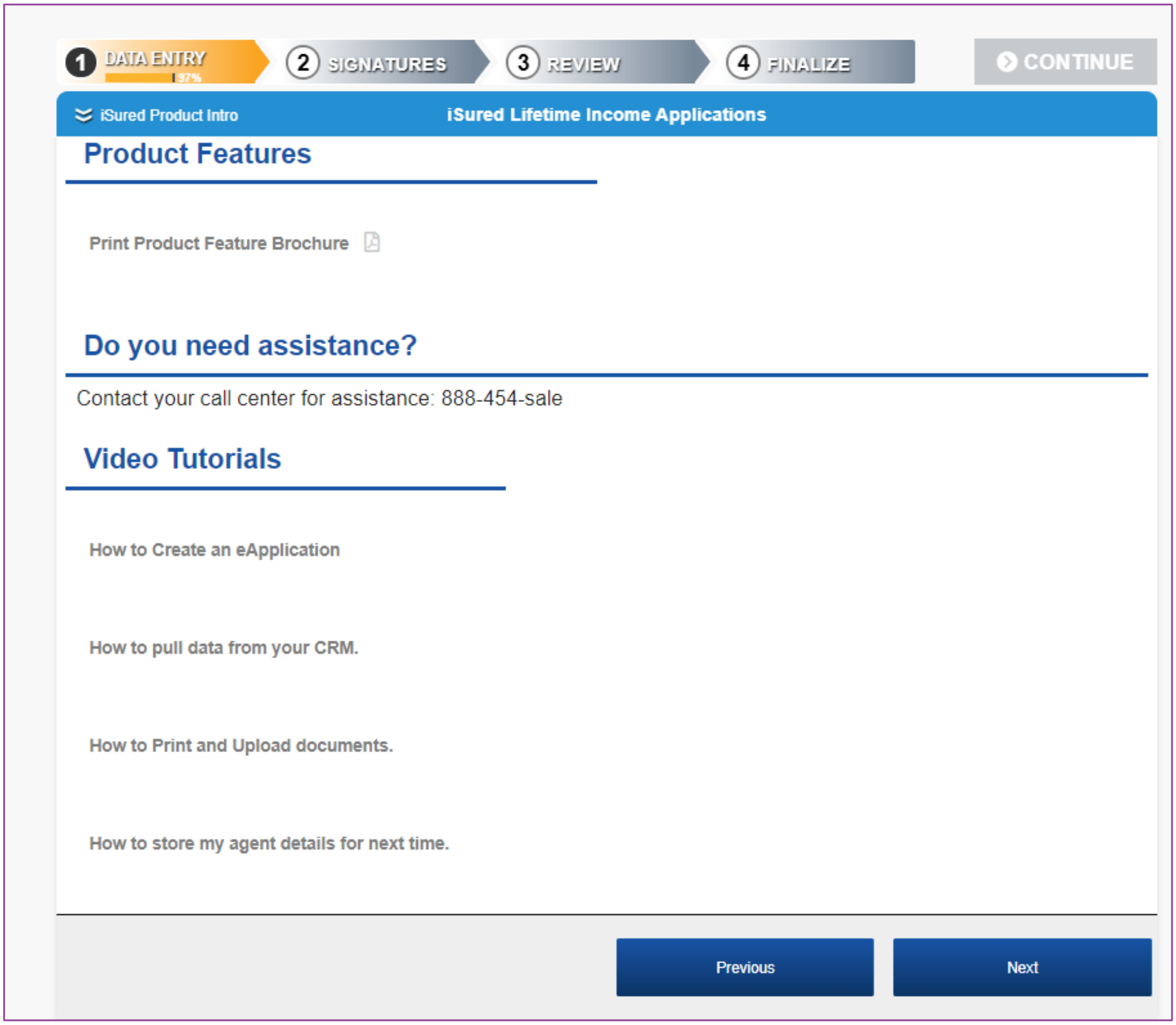
2.1 Links to Home page

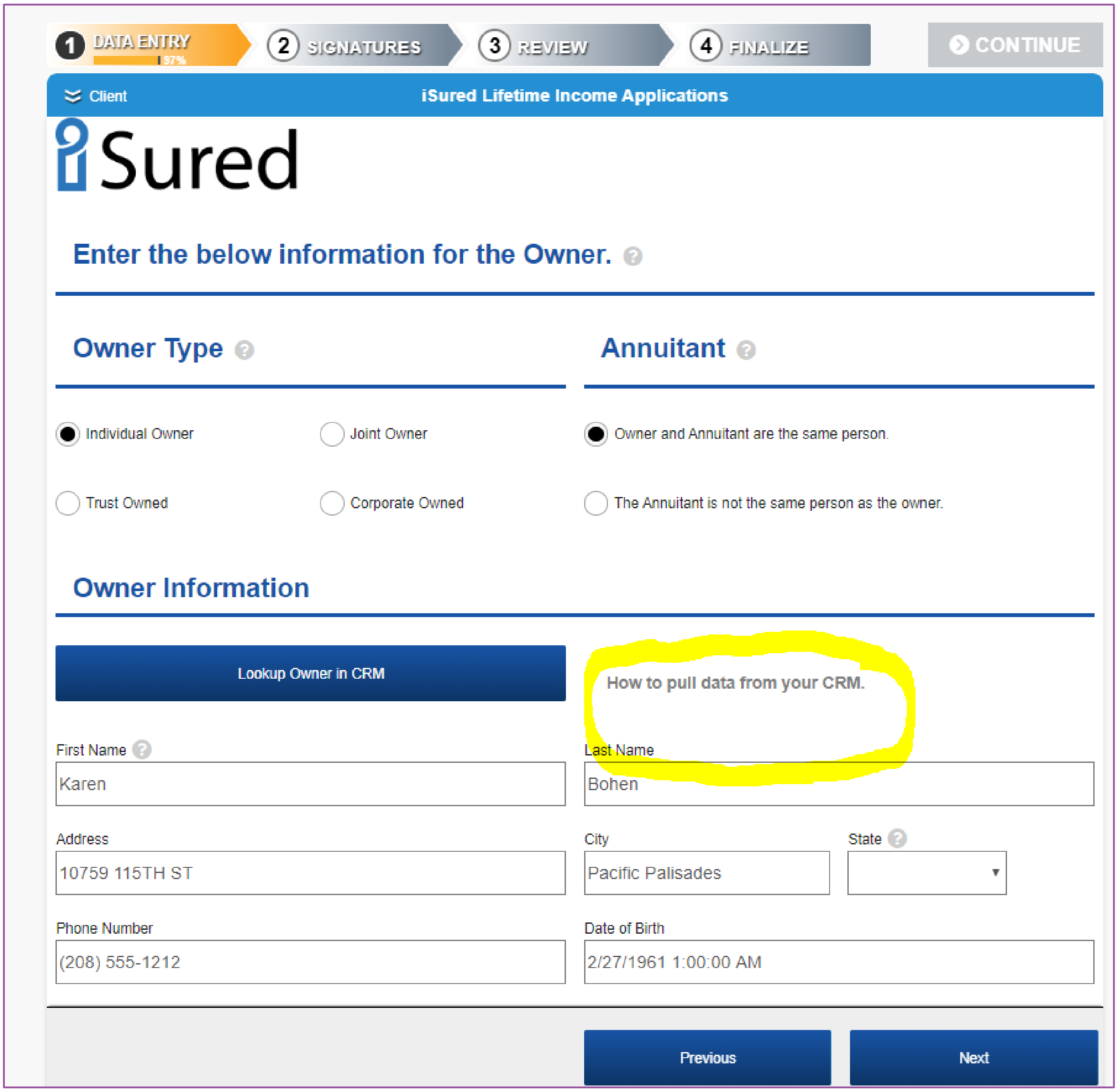
2.2 Links to an Additional Detail page

2.3 Links to the Product page on the carrier website

2.4 Links to download the Product Brochure

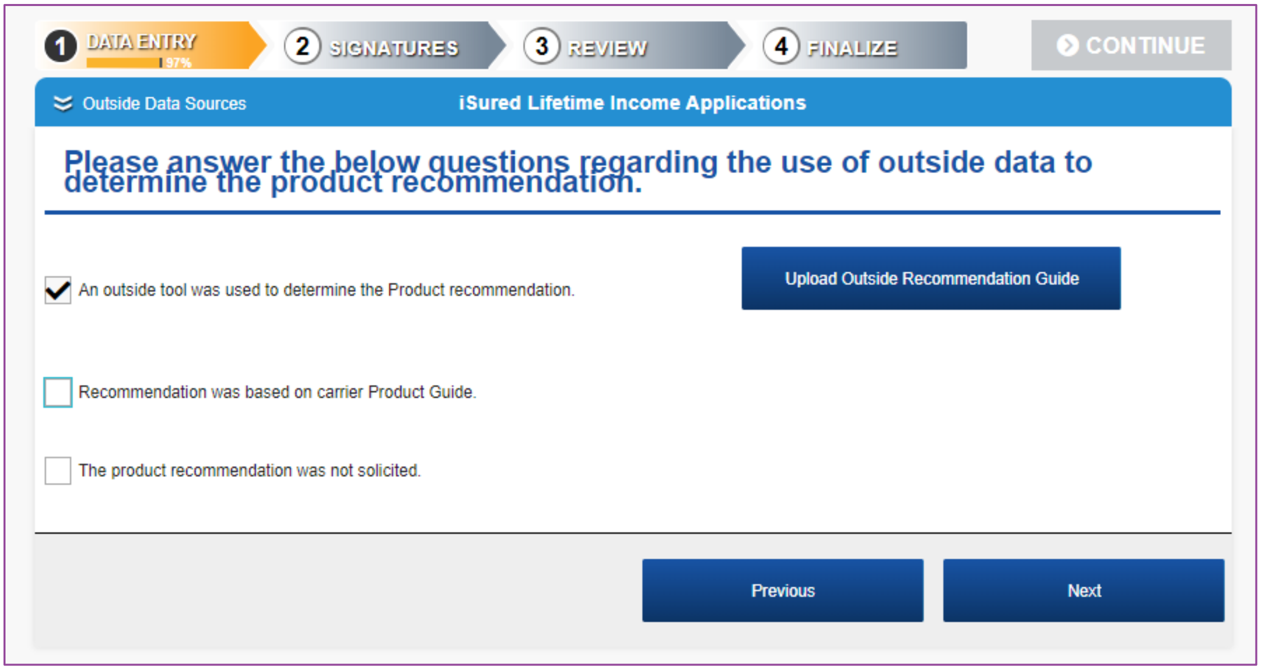
2.5 Links to Training Videos in FireLight




1 DATA ENTRY
97%
2 SIGNATURES
3 REVIEW
4 FINALIZE
CONTINUE
Client
iSured Lifetime Income Applications
iSured
Enter the below information for the Owner.
Owner Type
Annuitant
Individual Owner
Joint Owner
Owner and Annuitant are the same person.
Trust Owned
Corporate Owned
The Annuitant is not the same person as the owner.
Owner Information
Lookup Owner in CRM
How to pull data from your CRM.
First Name
Karen
Last Name
Bohen
Address
10759 115TH ST
City
Pacific Palisades
State
Phone Number
(208) 555-1212
Date of Birth
2/27/1961 1:00:00 AM
Previous
Next

3 Dynamic Upload Buttons

Create dynamic (rule driven) upload buttons that support an easy upload of the outside documents. Use templates to make these outside documents required.



4 Integrations

The following integrations can occur inside any activity during the edit phase.

4.1 CRM Integrations (e.g., SalesForce and Redtail)

4.2 Doctor Lookup

4.3 Address Validation

4.4 ACH Account Number Validations (GIACT)

4.5 Cooperative Technologies integration for Ceding Carrier E-Signature requirements

4.6 Custom Integrations that use the Provider:

With the integration team, build a custom call out to your system to validate information, pull back information into the activity, change status, or update a status. These custom integrations can occur at any phase of the activity.

4.6.1 Inside an Activity – Pull back data from an outside source to update the activity or provide validations.

- o Licensing and Contracting – Pull back the agent's licensing, contracting, and appointment data to display on the screen.
- o Funds Availability – With the integration team, build a custom call out to your system to validate the funds are in the client's account before proceeding.

4.6.2 Post Submission

- o Carrier Status post submission
- o Underwriting Status post submission

4.6.3 Poll for the update – FireLight can create logic inside the custom integration call to poll for the outside system's update. A frequency for how often to poll for the update can be defined along with logic to abort the check.

5 Workflow

5.1 L&A and Training check – Work with Carriers to support an L&A and Training call inside of FireLight to ensure the agent is licensed, appointed, and trained for the product they are selling.

5.2 Create an entire workflow with the FireLight activities.

- Add workflow steps using the configurable presale.
- Add next steps to move data into an illustration or quote.
- Move all data into an application.

6 Instruction Page

Do you need to provide additional instructions to agents? You can do that with a dynamic instruction page. You can make an entire page or just a section to provide instructions.

6.1 Replacement Instruction Page - Include a Print button and an Upload button to print forms that must be wet signed and uploaded.

6.2 After Submit, "What to Expect Next".

6.3 Trigger an instruction page when the app reaches a certain percentage (e.g., 96%) complete to see if the user is going to agree to e-signature to trigger document template forms. This will allow you to trigger instruction pages with Print and Upload if the user is going to wet sign.

7 Scoring and Presale

Following is a summary of what was demoed and discussed during the 2/6/2020 Spotlight.

7.1 Use data collected in FireLight and rules to create scoring based on the answers and/or combination of the answers.

7.2 You can hide the scores from the agent and control the workflow based on the answers and scores. It was also suggested that you can lock down the answers if you are concerned about agents manipulating the answers to receive a pass. Another option is to hide the score and use the score to move the order into a heightened review queue. Agents do not see the review queues.

7.3 You have many options where you can use the scores.

- Use the score inside a presale (please note this is a licensed product) to perform pre-suitability.
- Use the score inside an application to stop the order
- Use the score to automate the review queue or place the order in heightened review queue
- Carriers and distributors can both use this concept of scoring based on answers.

7.4 A best practice was identified for the carrier to include their suitability questions in their rules and can collect additional information if the answers merit additional details.

7.5 Presale options:

7.5.1 If you are using the scoring in a presale, you can use that to stop the agent before they go through the effort of an application.

7.5.2 Or, with a presale you can drive the product type or product selection based on the answers/score.

7.5.3 A presale can be used for Product selection. You can use the presale to filter products inside the presale and then move the agent from the presale to the application with the product already selected. That can be done with rules and setting the Next Activity data items: The next steps are driven by first the activity type of the current activity and its activity type's Admin configuration, then the user permissions in the role code based user group, then finally by the data items in the current activity.

- When the Known DataItems FLI_NEXT_ACTIVITY_JURISDICTION, FLI_NEXT_ACTIVITY_PRODUCT_CUSIP and FLI_NEXT_ACTIVITY_ACORDTYPE are set and valid, then it is possible for no options to be presented, but have the user redirected immediately to the new application.
- If only FLI_NEXT_ACTIVITY_JURISDICTION and FLI_NEXT_ACTIVITY_PRODUCT_CUSIP are filled and valid and there are multiple Activity Types for that product, then the user will be asked to select which Activity type to proceed to on that product.
- If only FLI_NEXT_ACTIVITY_ACORDTYPE is filled and valid then the user will be redirected to the new activity page and asked to select a product.
- If none of those data items are filled or valid then the user will be presented an intersection of the Activity Types the User has access to and the next Activity Types selected for the current activity type.

More on this can be found in the online help. Search for Configurable Activity or refer to the help guide: https://firelight.insurancetechnologies.com/EGAdmin/Help/Online%20Output/PDFGuides/FireLight%20Configurable%20Presale%20Guide%20v1.pdf

NOTE: Presale is a licensable event so please work with your sales contact to utilize this feature.