

iConnect 114027 Design Approach

Project Overview

Provide the ability to disable "use E-Signature" process.

Features/Requirements

Need to enhance existing functionality to full fill requirement to disable ESignature process from form entry.

Use Cases / Workflow Changes

Yes, there are few changes in existing workflow. We need to add new check with existing checklist i.e. whether current application is required E-Signature process or not. As per requirement we will update status bar.

Admin Changes

No admin changes required. User just need to add check box with tag name "FLI_DECLINED_ESIGN" on application and set export value "true" for "E-Signature" not required and false for "E-Signature" required.

App Changes

To accomplish this task, we need to add new common tag called "FLI_DECLINED_ESIGN". "FLI_DECLINED_ESIGN" can be null/empty, true or false. By default, it will be null and add with application data items.

If "FLI_DECLINED_ESIGN" is set to null or empty, we do not to do anything and process will run as usual.

If "FLI_DECLINED_ESIGN" is set to true, then E-Signature process will skip and next defined step will take place.

If "FLI_DECLINED_ESIGN" is set to false, then user will have to accept E-Signature process.

Integration Changes

No changes integration.

UI Mock Ups

On application form/other form, user will need to put check boxes for question. For example "Declined E-Signature? Yes or No".

Declined E-Signature question

1

FORM ENTRY

100 %

2

SIGNATURES

3

REVIEW

4

FINALIZE

CONTINUE

OPEN

AllocationTotal

Page 1

Declined E-Signature ? ☐ Yes ☐ No

6. PREMIUM PAYMENT

☐ Premium Amount Remitted with Application:

\$ PREMIUM_PAYM

☐ Estimated Premium Amount of 1035 Exchange/Transfer:

\$ PREMIUM_PAYM

Source of Premium Payment:

☐ Check
 ☐ Wire
 ☐ 1035 Exchange/Transfer
 (Payable to: Forethought Life Insurance Company)

7. STRATEGY(IES) ALLOCATIONS

PREMIUM ALLOCATION DIRECTION (Minimum of \$10,000 per Allocation.)

Whole Percentages

FIXED and INDEXED STRATEGIES:

User selected "No"

1

FORM ENTRY

100 %

2

SIGNATURES

3

REVIEW

4

FINALIZE

CONTINUE

OPEN

AllocationTotal

Page 1

Declined E-Signature ? ☐ Yes ☒ No

6. PREMIUM PAYMENT

☐ Premium Amount Remitted with Application:

\$ PREMIUM_PAYM

☐ Estimated Premium Amount of 1035 Exchange/Transfer:

\$ PREMIUM_PAYM

Source of Premium Payment:

☐ Check
 ☐ Wire
 ☐ 1035 Exchange/Transfer
 (Payable to: Forethought Life Insurance Company)

If user select "No" or do not select any option (Leave blank), will step in signature process.

1 FORM ENTRY

2 SIGNATURES

3 REVIEW

4 FINALIZE

Electronic Signatures

This application will be locked upon making these choices. No changes can be made after signing.

Use E-Signature
 Decline E-Signature

If you choose to use E-Signature, all signatures in this application will be collected electronically. Please read the Federal Regulations and Definitions. Please make sure all parties are equipped with these system requirements:

- Internet Access
- Minimum Screen Resolution 1024 x 768

If you choose to decline E-Signature, all signatures in this application will be collected manually. Your application will be completed in our system. You may print the application PDF files and deliver to your client via postal or other means. Please note that delivery of the information electronically will result in a superior customer experience.

If user select “Yes” option and press continue button. System skip E-Signature process and land to next defined process (in below example in review process).

1 FORM ENTRY 100 %

2 SIGNATURES

3 REVIEW

4 FINALIZE

CONTINUE

OPEN Allocation Total Page 1

Declined E-Signature ? ☒ Yes ☐ No

6. PREMIUM PAYMENT

☐ Premium Amount Remitted with Application: \$PREMIUM_PAYM
 ☐ Estimated Premium Amount of 1035 Exchange/Transfer: \$PREMIUM_PAYM

Source of Premium Payment: ☐ Check ☐ Wire ☐ 1035 Exchange/Transfer

Skip E-Sign Process and step in review process

1 FORM ENTRY

2 SIGNATURES

3 REVIEW

4 FINALIZE

Electronic Review

Send Request To Reviewer(s)
 Decline E-Review

If you choose to use E-Review, all reviews and approvals for this application will be collected electronically. Please read the Federal Regulations and Definitions. Please make sure all parties are equipped with these system requirements:

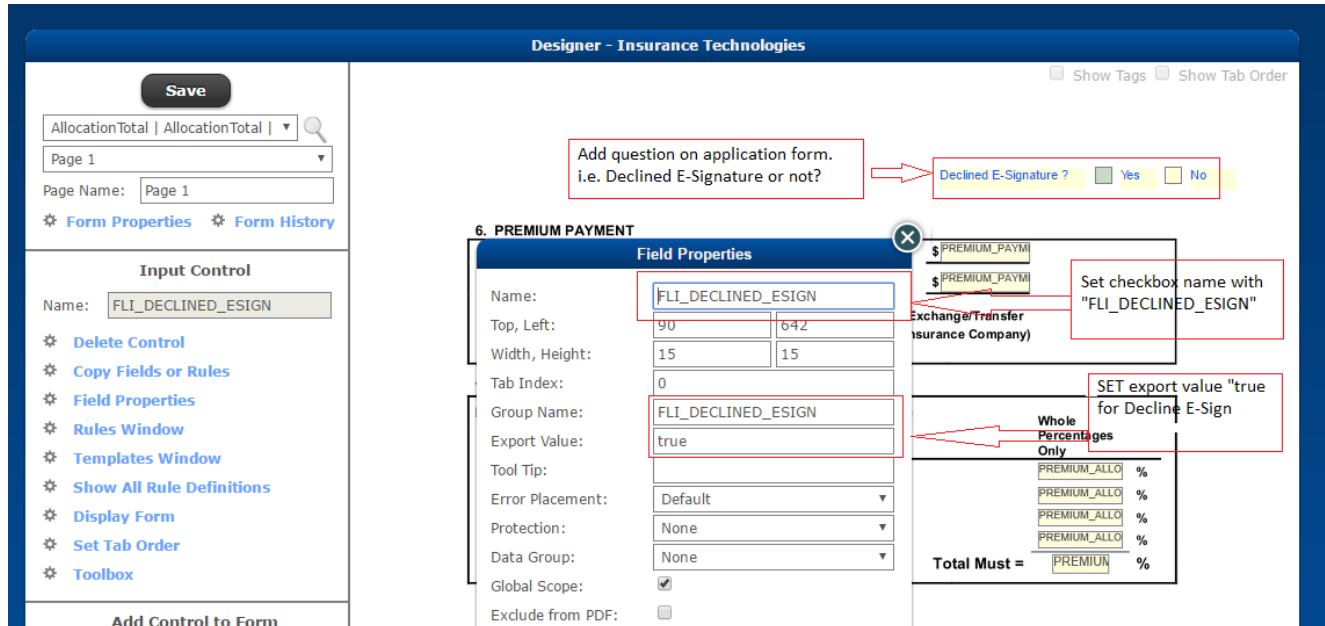
- Internet Access
- Minimum Screen Resolution 1024 x 768
- Web browser: Internet Explorer 8+ Firefox (current version) Safari

If this application does not require review or approval, click on 'Decline E-Review'.

If you choose to decline E-Review, all reviews and approvals for this application will be collected manually if necessary. Your application will be completed. You may print the application PDF files and deliver to your reviewers via postal or other means. Please note that delivery of the information electronically will result in a superior customer experience.

How to Enable and Use This Feature

User just need to add check box with tag name “FLI_DECLINED_ESIGN” on application form and set export value “true” for “Declined E-Signature?” and set false or empty if “E-Signature” required.



The screenshot shows the 'Designer - Insurance Technologies' interface. On the left is a sidebar with a 'Save' button, a search bar for 'AllocationTotal', and a list of controls including 'FLI_DECLINED_ESIGN'. The main area displays a form titled '6. PREMIUM PAYMENT' with a 'Field Properties' panel. The 'Field Properties' panel for 'FLI_DECLINED_ESIGN' shows the following settings:

- Name: FLI_DECLINED_ESIGN
- Top, Left: 90, 642
- Width, Height: 15, 15
- Tab Index: 0
- Group Name: FLI_DECLINED_ESIGN
- Export Value: true
- Tool Tip: (empty)
- Error Placement: Default
- Protection: None
- Data Group: None
- Global Scope: ☒
- Exclude from PDF: ☐

Annotations on the form indicate:

- "Add question on application form. i.e. Declined E-Signature or not?" points to the question text.
- "Declined E-Signature ?" points to the checkbox label.
- "Set checkbox name with 'FLI_DECLINED_ESIGN'" points to the 'Name' field in the properties panel.
- "SET export value 'true' for Decline E-Sign" points to the 'Export Value' field in the properties panel.

If organization has disable e-signature process (through setting “Allow E-Signature” option from Admin->Organization) and if user set “FLI_DECLINED_ESIGN” to false on application, E-Signature process will not be allowed.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		
- Reports		
- Deployment		

FireLight App		
- New Application		
- Edit Application	Yes	Add new condition with check list whether E-Signature process is required or not.
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		
- Shared	Yes	Add new common tag “FLI_DECLINED_ESIGN” and add it with other data items while new application is created.