

iConnect 134978 Design Approach for Signing Ceremony Form

Project Overview

Provide a document type for Signing Ceremony Only form which will allow a form to be presented during the signing ceremony without having a signature control on the form.

Features/Requirements

- Document type will be selected in the Packages tab of the Admin tool allowing user to designate a form as 'Signing Ceremony Only' in the package
- 'Signing Ceremony Only' form will not be visible in the edit application process nor be submitted as part of the application
- The form will be visible in the 'Display/Print PDF' view in the App Portal as an optional print item
- During the signing ceremony, the form will display as part of the form acknowledgement for each signer
- The placement of the form in the form acknowledgement will be based on the position of the form in the package within the Admin Tool's Packages tab

Use Cases / Workflow Changes

The 'Signing Ceremony Only' form allows organizations to present necessary disclosures to clients that do not require a signature but must be presented at the time of signing. When creating the package in the Admin Tool, the form would be added to the package and the document type of 'Signing Ceremony Only' selected from the document type drop down. The form would be presented to each signer during the form acknowledgement stage of the signing process along with forms requiring signatures.

Admin Changes

Document type 'Signing Ceremony Only' added to the document type drop down of the Forms in Package section on the Packages tab.

App Changes

Documents with the document type of 'Signing Ceremony Only' will be added to the print list in the 'Display/Print PDF' view. The form will display for all signers during the form acknowledgement stage of the signing process. It will not display as part of the application during the edit application stage. It will also be excluded from back office processing.

Integration Changes

None needed

UI Mock Ups

Admin Tool- Packages Tab

Package Type
Application - Package 1 ▼

Last l
02/1

Forms in Package

_Form with 3 pages

Approved States

Optional ▼

Optional
Required
Conditional
Print Only
Submit Only
Input Only Required
Input Only Conditional
Signing Ceremony Only

Role

App Portal- Display/Print PDF

Select Documents to Print


Print Selected Documents Back to Application

| | | | | |
|-------------------------------------|------------------|--|---|---|
| <input checked="" type="checkbox"/> | Application Form | AllocationTotal | ⬆ | ⬇ |
| <input checked="" type="checkbox"/> | Application Form | financial affidavit revised 2014 | ⬆ | ⬇ |
| <input checked="" type="checkbox"/> | Signing Ceremony | Fillable_PDF_Sample_from_TheWebJockeys_vC5 | ⬆ | ⬇ |
| <input type="checkbox"/> | Optional Form | Agent signature | | |
| <input type="checkbox"/> | Report PDF | Validation Report | | |


App Portal- Form Acknowledgement in Signing Ceremony

Before signing, you must review all pages of each of the 2 documents below.

Please click the buttons below to proceed.




Privacy Notice



AllocationTotal


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



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| FACTS | WHAT DOES SIGNATURE BANK, SIGNATURE SECURITIES GROUP CORPORATION AND SIGNATURE FINANCIAL LLC, TOGETHER KNOWN AS "SIGNATURE," DO WITH YOUR PERSONAL INFORMATION? |
|-------|--|
| Why? | Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do. |
| What? | The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> ■ Social Security number and credit history ■ account balances and account transactions ■ payment history and checking account information When you are no longer our customer, we continue to share your information as described in this notice. |
| How? | All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons Signature chooses to share; and whether you can limit this sharing. |

Reasons we can share your personal information
Does Signature share?
Can you limit this sharing?



How to Enable and Use This Feature

- In Admin Tool in the Packages tab, add form to package and select 'Signing Ceremony Only' from the document type drop-down
- In App Portal, create an application- verify the form is not listed as optional in the list of forms for application
- In edit application process, verify the 'Signing Ceremony Only' form is not visible in menu list of forms or in the application view
- Click Other Actions/Display/Print PDF. The 'Signing Ceremony Only' form should appear in list of forms to be selected for print with the document type listed to the left

Areas Impacted

| System Area | Yes | Comment |
|---------------------------------|-----|--|
| Admin Tool | | |
| - Form Library | | |
| - Design Forms | | |
| - Profile Administration | | Addition to document type drop-down in Package Forms |

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|-------------------------------|--|--|
| - Reports | | |
| - Deployment | | |
| | | |
| FireLight App | | |
| - New Application | | |
| - Edit Application | | Visibility of Signing Ceremony Only forms hidden |
| - Signature Process | | Addition of Signing Ceremony Only forms to the form acknowledgement without signature controls |
| - Review Queue | | |
| - Manual Review | | |
| - User Preferences | | |
| - Inbound Integration | | |
| - Outbound Integration | | |
| - PDF Generation | | Addition of Signing Ceremony Only forms to the Display/Print PDF form list as optional print |
| - Email System | | |
| | | |
| FireLight Console | | |
| - Windows | | |
| - iOS | | |
| | | |
| Other Systems | | |
| - DTCC Integration | | |
| - Commission Netting | | |
| - Activity Reporting | | |