INSURANCE TECHNOLOGIES

FireLight®

iConnect 170245 Design Approach

Project Overview

This project will enhance the reporting by adding a new admin report to show how the client is signing the application (Remote, Sign Now) and indicate if client fill or client fill and sign is used. Multiple signers will be tracked as well.

Features/Requirements

Need to add new report to show how client is signing the application. Details of what columns are included in the report are below:

Repeat per signer in the application so each application could have several rows. Carrier, Distributor, Agent ID, Agent Role code, App ID, Number of signer roles on the application, Client role type, Signing session ID, Signer Signed multiple roles, Signing Type, Client Fill (Y/N), Client Fill and Sign (Y/N).

This report would look like this: (sample report is loaded with the iConnect)

Carrier	Distributor	Agent ID	Agent Role code	App ID (GUID) (This will repeat for each row data for the same application.)	Number of signer roles on the application	Client role type	Signing Session ID (not sure how we track this but I am trying to show if the same person is signing for multiple roles.)	Signer Signed multiple signer roles	Signing Type	Client Fill (Y/N)	Client Fill and Sign (Y/N)
Voya	Primerica	Katherine_FLADEMC	FLA10	344dkd99re3rkldkd	3	Owner	9r9erkekekek	N	Sign Now	N	N
Voya	Primerica	Katherine_FLADEMC	FLA10	344dkd99re3rkldkd	3	Joint Owner	43430kdkd	N	Sign Later	N	Y
Voya	Primerica	Katherine_FLADEMC	FLA10	344dkd99re3rkldkd	3	Agent	ddl0s9dld	N	Sign Now	N	N
Transamerica	Primerica	Katherine_FLADEMC	FLA10	434gg3e66ghg	2	Owner	aad 434434	N	Sign Later	Y	N
Transamerica	Primerica	Katherine_FLADEMC	FLA10	434gg3e66ghg	2	Agent	7676dfgr334	N	Sign Now	N	N
Lincoln	Primerica	Katherine_FLADEMC	FLA10	4343477ffdgfd45	3	Owner	9r9erkekekek	Y	Sign Now	N	N
Lincoln	Primerica	Katherine_FLADEMC	FLA10	4343477ffdgfd46	3	Payor	9r9erkekekek	Y	Sign Later	N	Y
Lincoln	Primerica	Katherine_FLADEMC	FLA10	4343477ffdgfd47	3	Agent	ddl0s9dld	N	Sign Now	N	N

Use Cases / Workflow Changes

No changes in existing workflow.

Admin Changes

We need to add new report template for “ClientSignReport” and add new class to define its functionality.

App Changes

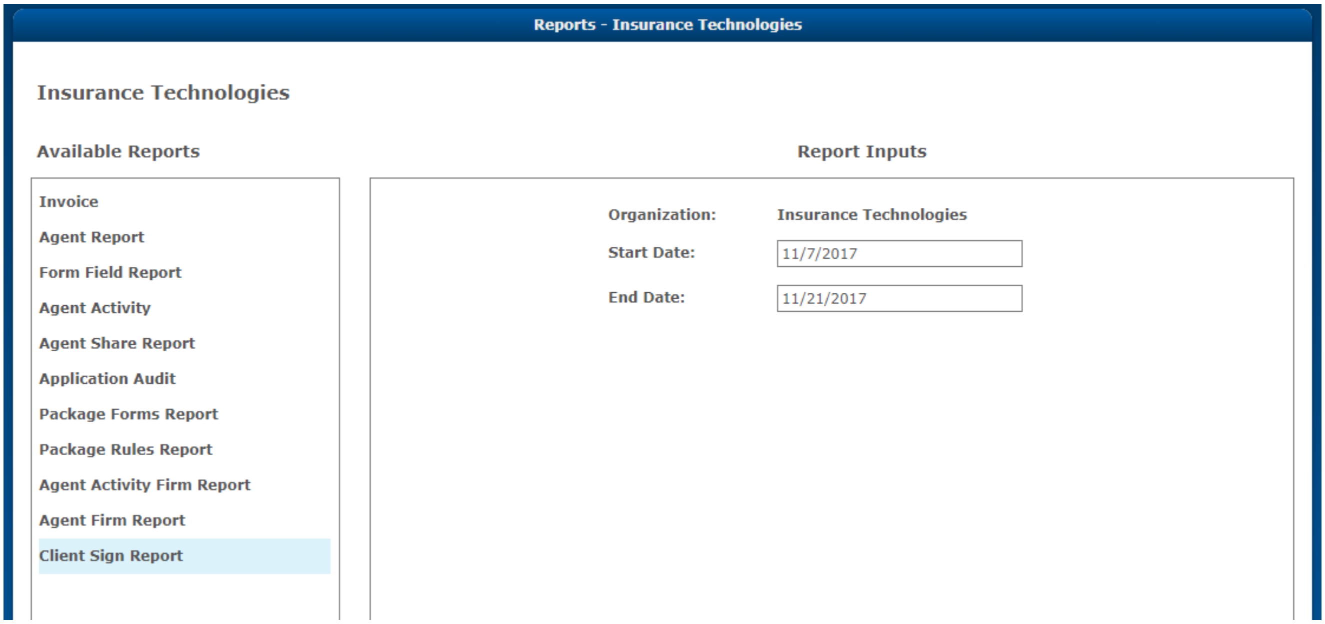
No App Changes required.

Integration Changes

None

UI Mock Ups

In report section user can see new report and generate report for specified input details.



Client Signed Report

Organization: Insurance Technologies   Start Date: 3/7/2018   End Date: 3/8/2018

Carrier	Distributor	Agent ID	Agent Code	Application ID	Number of Signer	Client Role Type	Signing Session ID	Signer Signed Multiple Signer Role	Signing Type	Client Fill	Client Fill and Sign
				e116-4d83-828f-95230542ef84							
COS QE (Carrier)	COS QE (Carrier)			c78d5882-4663-4c38-a10e-cd433e6e515a	2	Annuitant				N	Y
COS QE (Carrier)	COS QE (Carrier)			c78d5882-4663-4c38-a10e-cd433e6e515a	2	Owner				N	Y
Peak Life Insurance	Peak Life Insurance			9dd5517a-3e1b-4cec-9b72-d67368f1b580	2	Agent				N	Y
Peak Life Insurance	Peak Life Insurance			9dd5517a-3e1b-4cec-9b72-d67368f1b580	2	Owner				N	Y
Insurance Technologies	Insurance Technologies			2b9c9499-7023-48b0-88e7-f9b0dc42fea7	2	Agent				N	Y
Insurance Technologies	Insurance Technologies			2b9c9499-7023-48b0-88e7-f9b0dc42fea7	2	Insured				N	Y

How to Enable and Use This Feature

To enable this report we need to update the database as per request from client/user.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		
- Reports	Yes	We need to add new report template and a class to define its functionality.
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- 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		