

iConnect 137812 Design Approach for Extended Application Status

Project Overview

Currently the status notification of an application is limited to form entry, locked, signatures, pending review, reviewed, transmitted, and complete. Users are also notified of the review statuses of pending review and being reviewed through the use of pop-ups in edit application view, the status in the Application Summary, and labels in the All Applications view.

Additional status notification is needed for the review queue when more information has been requested, the application has been approved or rejected, and when the deadline has passed. The status for signatures can also be extended by providing a pop-up notification with a message indicating whether it is 'Pending Agent Signatures' or 'Pending Client Signatures'.

Features/Requirements

- The current status structure of form entry, locked, signatures, pending review, reviewed, transmitted, and complete will remain in place.
- Additional status notification for the review queue will be provided through the use of pop-up notifications in the edit application view. For example, the notification would indicate if application has been declined in the review queue. If the deadline has passed, the notification will also indicate the application has been declined. For the manual review, the underwriting status will indicate Approved when all of the requested reviewers have approved the application. As the application is unlocked when the reviewer declines, the underwriting status is not updated to Declined.
- Status on the All Applications view will also reflect the extended application status with the review queue status added as a secondary underwriting status.
- The status in the Recent Application view on home page would reflect the same status as displayed on the All Applications view.
- When case is in signature status, add notification of whether agent, client, or both signatures are pending through the use of the pop-up notification within the edit application view.
- The extended status, underwriting status, can currently be modified through provider code. It will continue to be modifiable through the provider. If it is modified in the provider, the returned status will overwrite the extended status set by the review queue.

Use Cases / Workflow Changes

Agent re-enters a submitted application that has been through the review queue process. Currently, if an application has been reviewed and rejected in the review queue, this information is only available in the review queue history. This information would then be inaccessible to agents that do not have review queue visibility. Adding the review queue status to the pop-up notification, the all applications view, the recent applications view, and the application summary will allow the agent access to the review queue status of the application.

For the signature status, the system currently notifies the agent that the application has completed step 1 of 4 in the pop-up notification and the status is set at 'Signatures'. Extending the signature status for the pop-up notification would allow the agent to identify quickly whether the application submission is pending client signatures or just the agent signature.

Admin Changes

N/A

App Changes

Underwriting status added to the recent applications and all applications view to indicate status for Approved, Declined, and More Info Requested. Custom declined text added for pop-up notification when entering an application that has been declined within the internal review queue. In the manual review process, the application is unlocked when the reviewer declines, so the underwriting status is not updated to Declined.

Additional information added to the custom signature step text to allow for notification on whether agent, client, or both signatures are missing from a locked application.

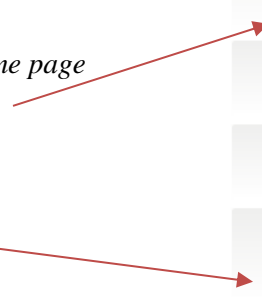
Integration Changes

N/A

UI Mock Ups

App Portal

Recent application view on home page




| |
|--|
| QApproval- Jennie Rule Test Status: Complete Last Update: 2/21/2017 9:59:22 AM Underwriting Status: Approved |
| SignerReq- Jennie Rule Test Status: Form Entry Last Update: 2/21/2017 9:50:18 AM |
| New Signer - Jennie Rule Test Status: Locked Last Update: 2/17/2017 3:51:42 PM |
| 2Copy of SkipHtml NoQ 50External - Jennie Rule Test Status: Transmitted Last Update: 2/17/2017 1:42:57 PM Underwriting Status: Declined |
| Copy of SkipHtml NoQ 50External - Jennie Rule Test Status: Complete Last Update: 2/17/2017 1:28:53 PM Underwriting Status: Approved |

Pop-up when entering an app that has been rejected in the review queue.

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Page 1

This submitted application has been rejected by the reviewer and was not released to the carrier.

[Close]



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All applications view

QDecline- Jennie Rule Test
Jennie Rule Test
Transmitted

Last Action:
Submitted

Underwriting status:
Declined

Last Audit Entry: 2/21/2017 1:48:10 PM MST
 Application 'QDecline- Jennie Rule Test' was submitted to the back-office systems for final processing. [View All](#)

View Requests Delete Copy

QApproval- Jennie Rule Test
Jennie Rule Test
Complete

Last Action:
Back Office Message

Underwriting status:
Approved

Last Audit Entry: 2/21/2017 9:59:22 AM MST
 All Back Office Processing Complete. [View All](#)

View Requests Delete Copy

How to Enable and Use This Feature

[Instructions on how to enable and use the feature within FireLight. Provide instructions for Admin and App]

Areas Impacted

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

| | | |
|-------------------------------|--|--|
| - Deployment | | |
| | | |
| FireLight App | | |
| - New Application | | |
| - Edit Application | | <p>Addition to pop-up notification for apps declined in review queue</p> <p>Addition to pop-up notification for apps in signing that indicates whether agent, client, both signatures are needed</p> <p>Underwriting status added to recent applications and all applications view</p> |
| - 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 | | |