INSURANCE TECHNOLOGIES

Allow admin to return an application to a Review Queue

FIRELIGHT BASE

FireLight®

Platform

Insurance Technologies, LLC

Insurance Technologies, LLC
Two South Cascade Avenue
Colorado Springs, CO 80903
USA
Phone: 719.442.6400
FAX: 719.442.0600

Internet E-Mail: info@insurancetechnologies.com
Website: http://www.insurancetechnologies.com

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iConnect Design Approach - Allow admin to return an application to a Review Queue

Project Overview

If a user needs to recall an activity that has recently been rejected, there is not a current solution that a user can use within FireLight to allow for this action to occur.

This enhancement will allow a reviewer the ability to recall a rejection request for an activity in the OSJ Review Queue. This will be based on a role code setting within the admin that will add a recall button to the Review Queue History tab if an activity has been rejected for any reason (i.e. selecting recall, or reaching the set deadline date). This enhancement will allow the user the ability to control if an activity needs to be re-reviewed by an additional reviewer, and will be able to stop potential mistakes made by selecting the reject button prematurely, or allowing the activity to reach the deadline date with any action taken.

Impacts:

Reject Functionality - when an activity is rejected, a user now has the ability to re-release it back into the same queue it was released from

Role Codes - This feature is only available through role codes.

Audits - This feature will keep a record of each rejection and when it is recalled.

Reviewer Documents - If an activity is rejected and recalled, the reviewer documents and any comments made by the previous reviewer are retained for the next reviewer to review/edit.

Review Queue History Tab - UI - An action button has been added to allow a recall on a rejected activity to occur.

Providers - a Provider hook was added in alongside this functionality in case any provider needs to be done on an individual client basis. This shouldn't result in any impact at this time.

Sequential Review Queues - Reviewer documents will be retained from a recall, and the comments retained in the original queue, but since each queue has a brand new document set, these comments will not be retained across sequential review queues. However, these comments can be copied through a client's provider at this time. If interested in this, please reach out to your project manager

1 Review Queue Recall: Admin: Create Recall Rejection role code setting

We only want this Recall Rejection functionality to be accessed by role code. Within the Groups section under the Review Queue tab, we need to add a checkbox to access the recall. This will be called "Recall Rejection"

Acceptance Criteria

- Recall Rejection will be added under the Review Queue tab, which upon selection will turn on the functionality on the app side under the Review Queue History
- If the checkbox is unselected, the functionality will not appear on the app side under the review queue history

2 Review Queue Recall: Retain and capture all comments on Reviewer Documents

Currently within FireLight, All reviewer documents are removed from an activity when an application is unlocked from the review queue. This needs to be removed so that all reviewer documents will be retained no matter the action.

For example, when a reviewer has left the company, or is on an extended leave, but has locked cases to review, the only way for another reviewer to review this case is to unlock, which releases the document, and deletes any previous comments. When we retain these documents, a new reviewer can be assigned to this application, and the previous reviewer's comments will still be visible to the new reviewer. The new reviewer will have the ability to edit the comments of the previous reviewer, either choosing to keep the previous comments and appending their own, or removing to add their own comments.

Acceptance Criteria

- The reviewer documents in the review queue will be retained when the application has been rejected and when it has been unlocked and released back to the queue.
- In the reviewer documents, all comments will be retained
- The supervisor reviewer will be able to add additional comments
- Each reviewer can add in additional comments.

3   Review Queue Recall: Add Provider Hook on OSJ Reject Interface to know when this recall occurs

Within FireLight today, if an activity is rejected, a note is made within the activity audit history, the display message will show it's been rejected, and the case essentially ends at this point. If we want to recall a rejection, we will need the ability to connect to the provider so we can know when this recall occurred. This call will need to provide the application ID in order for the provider to pull the needed queue and application info.   This will allow for any additional provider work to be completed by that carrier or distributor at a later date. This method can be called "Recall Reject"

Acceptance Criteria

- The provider will be connected to the OSJ Reject Interface in order to know when a recall occurred.

4 Review Queue Recall: Capture any Audit Entries for the Rejection

Need the ability to capture the user information, action, and timestamp from each audit entry on the review queue rejection.

Also, we'll need to create a new message for when a user recalls the rejection to place both in the Application History and Application Audit.

The message will display as such: This application has been recalled from rejection by the reviewer '(abc)' and has been moved back to the previous review queue.

Acceptance Criteria

- Audit history will include user information, action, and timestamp on undoing a review queue rejection
- Application Audit will include user information, action, and timestamp on undoing a review queue rejection
- The message on the application history and application audit will display as "This application has been recalled from rejection by the reviewer '(1)' and has been moved back to the previous review queue."

5 Review Queue Recall: Add Action button on the History in Review Queue to be able to Recall

An action button needs to be added in the History section of the review queue to recall rejection. This will allow the reviewer to be able to recall that rejection (if role code permissions are given), and add the activity back to the queue that it was rejected from.

This recall rejection button will show on the bottom left hand side of the rejected activity that has not been purged and the logged-in user has access to it.

Once the button has been clicked, a dialog box will appear confirming that the user wants to recall that application from rejection. It will state "Are you sure you want to recall this rejection?" An OK and a Cancel button will display below the question.
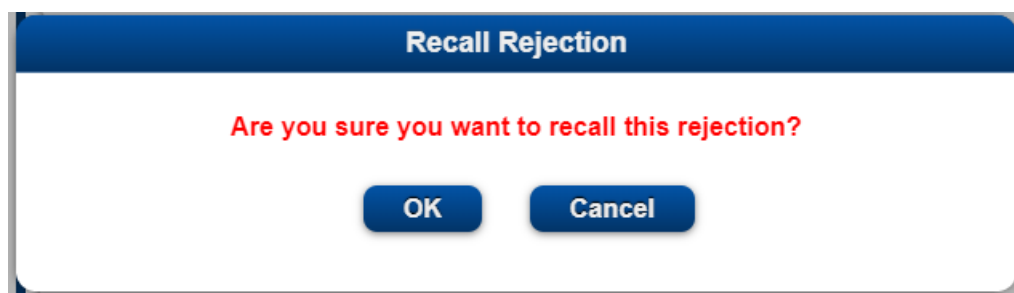
If the Cancel button is selected, the dialog box closes, and the application remains rejected.

Once the OK button is selected, the dialog box will close, and the application will be recalled from rejection, and put back into the original review queue that it was rejected from. The status for this activity will be "Pending Review", and in an unlock state, however, the reviewer documents will still be visible, and all comments will be retained from the previous reviewer. Additionally, any action (reject, approve, more information) will still need to be made by the new reviewer.

Additionally, if the deadline date has been selected for a specified time, once a recall occurs, the deadline date will start over. For example, if I had an application set for 7 days, and I was on day 4 and the application was rejected, but then recalled, the app would be added back to the review queue showing that it would expire in 7 days.

Acceptance Criteria

- Within the Rejected application on the Review Queue History page, an action button will be displayed on every Rejected application allowing the user to recall that activity from rejection, and adding it back into the review queue it was rejected from.
- This button will show on any activity that is not purged and the logged in user has access to it.
- When user selects the recall rejection button, a dialog box will appear asking the question, "Are you sure you want to recall this rejection"?
- If "Cancel" is chosen, the dialog box will close, and the application will stay in a rejected state.
- If the OK button is selected, the activity will be restored back into the review queue that it was in, and also show in the status of "Pending Review".
- The application will be restored in an unlocked position in the original queue. A new reviewer will be able to continue any other action at this point (approve, reject, more information)
- Reviewer documents will be retained and the previous reviewer's comments will be visible (if applicable).
- If a deadline date is set, then the clock will restart and expire based on what is set within the admin tool (ex: if set to 7 days, the case will reject/approve at 7 days.). This could also be set to Reject or Approve, so the application will reject or approve based on the timeframe and action set within the admin tool
- The rejection recall will only apply to the OSJ/post submit review, and not to the pre/post signature reviews.