

Disable Signing Ceremony after PreSignature Review

Design Document

The firelight logo, featuring the word "firelight" in a lowercase sans-serif font. The "i" has a small orange hexagon as its dot.

DISABLE SIGNING CEREMONY AFTER PRE-SIGNATURE REVIEW

Document Version: 1.0

1/10/2023

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Project Overview

This enhancement will prohibit advisors from sending an activity for the signing ceremony when Pre-Submit (Pre-Signature) process is enabled. They can send the application for Pre-Submit (Pre-Signature) Review but not for signing.

Impact:

- New group setting under “Submit” section on “App” tab.
- “Continue” button on activity navigation will be disabled when the new group setting is checked.

1. Group Setting to Disable Signing after Pre-Signature Review

Currently when a Pre-Signature review step is added for an activity, advisors can proceed for signing ceremony after the review process is complete. Requirement is to stop a user group to not be able to send the application for signatures after the review. For this a new group setting check box will be added as “Disable Continue after Pre-Signature Review” under “Submit” section on “App” tab.

Following is a mockup to display placement of the new group setting.

The screenshot shows the Hexure Admin interface with the 'App' tab selected. The interface is divided into several sections: Emails, Other, Paramed Ordering, Print Options, Quote, Signing: Tele-Sign, Submit, and Testing. The 'Submit' section is highlighted with a yellow box around the 'Disable Continue after Pre-Signature Review' checkbox. Other settings include 'Allow PassCode Email', 'Auto-Email PassCode', 'Disable Email After Submit', 'Enable Auto Submit Email Notification', 'Enable Cc Sender In All Requests', 'Enable Decline E-Sign Email', 'Enable Leave-Behind Email', 'Enable Submit Email for Agent', 'Enable Submit Email for Reviewer', 'Enable Use Agent Email', 'Optional Client Email', 'Disable Copy', 'Disable Edit Preferences', 'Disable Log Off', 'Enable CRM Preferences', 'Active Agent User List', 'Disable Console For Group', 'Enable Multi-Life', 'Enable Multiple Open Activities', 'Enable APPS', 'Enable ExamOne', 'Disable Print PDF', 'Enable Custom Print Override', 'Enable Print Individual Forms After Lock', 'Enable Print NIGO', 'Disable Annuity Quotes', 'Disable Life Quotes', 'Sales Agreement Products Only', 'Enable Tele-Sign', 'Enable Tele-Sign Download Forms', 'Enable Tele-Sign Email Link', 'Enable Tele-Sign Generate Link', 'Allow Not In Good Order Submittals', 'Disable Continue at 100%', 'Enable Auto Submit', 'Enable Custom Submit Page', 'Enable HTTP Redirect on Submit', 'URL:', 'Enable Distributor Testing View', 'Enable Override Date', and 'Enable Test Mode'. A 'Save' button is located at the bottom right.

This new group setting “Disable Continue after Pre-Signature Review” will work as a toggle option with the group setting “Disable Continue at 100%”. Hence, if check box “Disable Continue after Pre-Signature Review” is checked, admin cannot check the setting “Disable Continue at 100%”, and vice-versa.

Acceptance Criteria

- New group setting check box "Disable Continue after Pre-Signature Review" is added on "App" tab under "Submit" section.
- By default, this check box is unchecked.
- New group setting works as a toggle with the group setting "Disable Continue at 100%".

2. Disable Continue button after Pre-Signature Review is Complete

When the group setting “Disable Continue after Pre-Signature Review” is checked, the advisor/user cannot enter the signing ceremony after the Pre-Signature review process is complete. The “Continue” button on the activity navigation bar will show disabled so that user cannot click it to move to the next step of signing ceremony.

Following mockup displays the application activity screen where Pre-Signature review is complete and “Continue” button is disabled.

1 DATA ENTRY ✓
2 REVIEW ✓
3 SIGNATURES
4 FINALIZE

CONTINUE

Insured Details
Pru-Life-Ins-Wizard

Proposed Insured (Policy owner unless section is completed)

Insured First Name
Insured Middle Name
Insured Last Name

Valued
Client

Previous Name (if changed in last 5 years)
Social Security Number
Date of Birth

01-01-19

State of Birth
Email Address

California
kchoubisa@insurancetechnologies.com

Male
Female

Date policy to save age?
Yes
No

Are you a permanent, legal US resident?
Yes
No

Previous
Next

Use Case:

A Carrier has a set of RIA advisors that are expected to get an activity to the signature step without being able to kick off the signing ceremony. This was easy in the past since they could simply "Disable Submit at 100%" which would give the RIA enough permissions to complete the app without continuing to the next step. However, with the introduction of a pre-submit (pre-signature) review queue, the RIA now needs to be able to click "Continue" once they hit 100% to send the review request.

The carrier now wants to allow the RIA advisors to click "Continue" the first time to trigger the Review Queue but restrict their ability to hit "Continue" until after the review is approved. Our proposed solution was to simply disable the RIA's ability to sign as both the Client and Agent which would prevent them from completing any signatures. They advised that this would not

be good enough for their business workflow as they want to prevent the RIA from triggering the signing ceremony itself.

Acceptance Criteria

- When group setting "Disable Continue after Pre-Signature Review" is checked:
 - Once data entry is complete, user can click "Continue" button to submit for Pre-Submit (Pre-Signature) review.
 - Once Pre-Submit (Pre-Signature) review process is complete (Approved or Declined), user cannot continue to the signing ceremony process.
- When group setting "Disable Continue after Pre-Signature Review" is unchecked:
 - When data entry is complete, user can click "Continue" button to send the activity for Pre-Signature review and also for the signing ceremony after review process is complete.
- Disabling the "Continue" button will be applied on both MVC and REACT interfaces.