# iConnect 112151 Design Approach

Add an option that allows agents to not have to review all form pages.
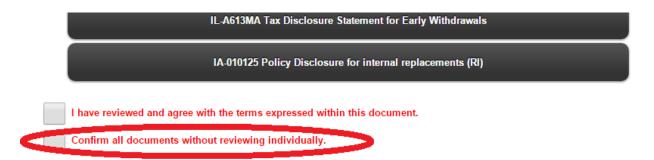
## Admin Changes

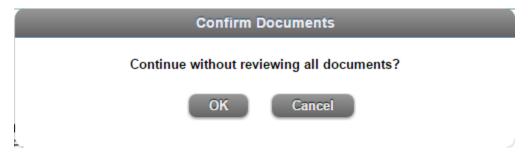Add a group option 'Agent Not Required to View All Pages.'

| Name | Agent |
|---|---|
| TC Role Codes | 1 |

**App Only** | **Admin Only** | **Review Queue Only**

- ☐ Disable Copy Apps
- ☐ Disable View Documents
- ☐ Disable Save Apps
- ☐ Disable View Application
- ☐ Disable View Application Summary
- ☐ Disable Edit Preferences
- ☑ Disable Email After Submit
- ☐ Disable Signing as Client
- ☐ Disable Signing as Agent
- ☐ Disable Sign Now
- ☐ Disable Submit
- ☑ Disable Signing Until All Pages Viewed
- ☑ Agent Not Required to View All Pages
- ☐ Optional Client Email
- ☐ Allow PassCode Email
- ☐ Auto-Email PassCode

- ☑ Require Digital Signature
- ☐ Require Mobile Verification
- ☐ Disable Editing Other Users' Applications
- ☐ Enable Use Screen Notification
- ☐ Enable Test Mode
- ☐ Enable Override Date
- ☑ Enable Cc Sender In All Requests
- ☑ Enable Single User to Sign Multi Signer Types
- ☐ Require Entry of Application Name
- ☐ Allow Not In Good Order Submittals
- ☐ Disable Console For Group
- ☐ Case Access by Firm ID
- ☐ Enable Override SSO
- ☑ Enable User Share
- ☐ Enable Multi-Life

## App Changes

If the group option 'Disable Signing Until All Pages Viewed' is enabled and 'Agent Not Required to View All Pages' is also enabled, when an agent signs, an additional checkbox labeled 'Confirm all documents without reviewing individually' will be displayed during the signing process:

**IL-A613MA Tax Disclosure Statement for Early Withdrawals**

**IA-010125 Policy Disclosure for internal replacements (RI)**

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

☐ Confirm all documents without reviewing individually.

If the agent checks that checkbox, a confirmation dialog will be displayed:

**Confirm Documents**

Continue without reviewing all documents?

OK          Cancel

And if the agent clicks OK on that dialog, an audit will recorded stating that they acknowledged all forms, and the agent will be able to sign without viewing each form page:

**IL-A613MA Tax Disclosure Statement for Early Withdrawals**

**IA-010125 Policy Disclosure for internal replacements (RI)**

Sign          Cancel

## Areas Impacted

| System Area | Yes | Comment |
| --- | --- | --- |
| **Admin Tool** | | |
| -    **Form Library** | | |
| -    **Design Forms** | | |
| -    **Profile Administration** | X | |
| -    **Reports** | | |
| -    **Deployment** | | |
| | | |
| **FireLight App** | | |
| -    **New Application** | | |
| -    **Edit Application** | | |
| -    **Signature Process** | X | |

| | | |
|---|---|---|
| - Review Queue | | |
| - Manual Review | | |
| - User Preferences | | |
| - Inbound Integration | | |
| - Outbound Integration | | |
| - PDF Generation | | |
| - | | |
| FireLight Console | | |
| - Windows O/S | | |
| - iOS | | |
| - Android | | |
| - | | |
| Other Systems | | |
| - DTCC Integration | | |
| - Commission netting | | |
| - Activity Reporting | | |