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Tele-Sign Enhancements 2.17 April

# FIRELIGHT BASE

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**TELE-SIGN ENHANCEMENTS 2.17 APRIL**

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# Design Approach - Tele-Sign Enhancements 2.17 April

Add the following enhancements to Tele-Sign functionality

Add ability to deliver tele-signed documents via email

## 1 Tele-Sign Enhancements

Add the following enhancements to Tele-Sign functionality

Add ability to deliver tele-signed documents via email

### 1.1 Tele-Sign Email Signed Documents After Submission (213347)

Add the option to be able to send the link to the final signed documents to the client through email. This would be done as long as the client provides an email address, last four of SSN and DOB. This would work just like it does on the e-sign or sign now process.

The following mock-ups indicate a change in screen design. There isn't much change in the number or type of controls. There is just a positioning/layout change for some to make it more consistent with other signing ceremonies.

#### **Signer Information Page** - All Fields Always Present

Signer Full Name: Always Required

City: Always Required

State: Always Required

Email Address: Required if Delivery Type = "Send via Email" and "Send Email "button is selected.

Last 4 Digits of SSN/Government ID: Required if Birth Date is entered

Birth Date: Required if Last 4 Digits of SSN/Government ID is entered

#### **Form Access Page**- Eliminated Duplication of data present in Signer Information Section

Delivery Type

Download

No change in functionality

Generate Link

No change to display of link or Generate Link button

Validation of required signer fields run against contents of Signer Information Section

Send via Email

No change to Email template or Send Email Button

Collect Your Name and Your Email for the Agent/Adviser/User

Validation of required signer fields run against contents of Signer Information Section

### Complete Section

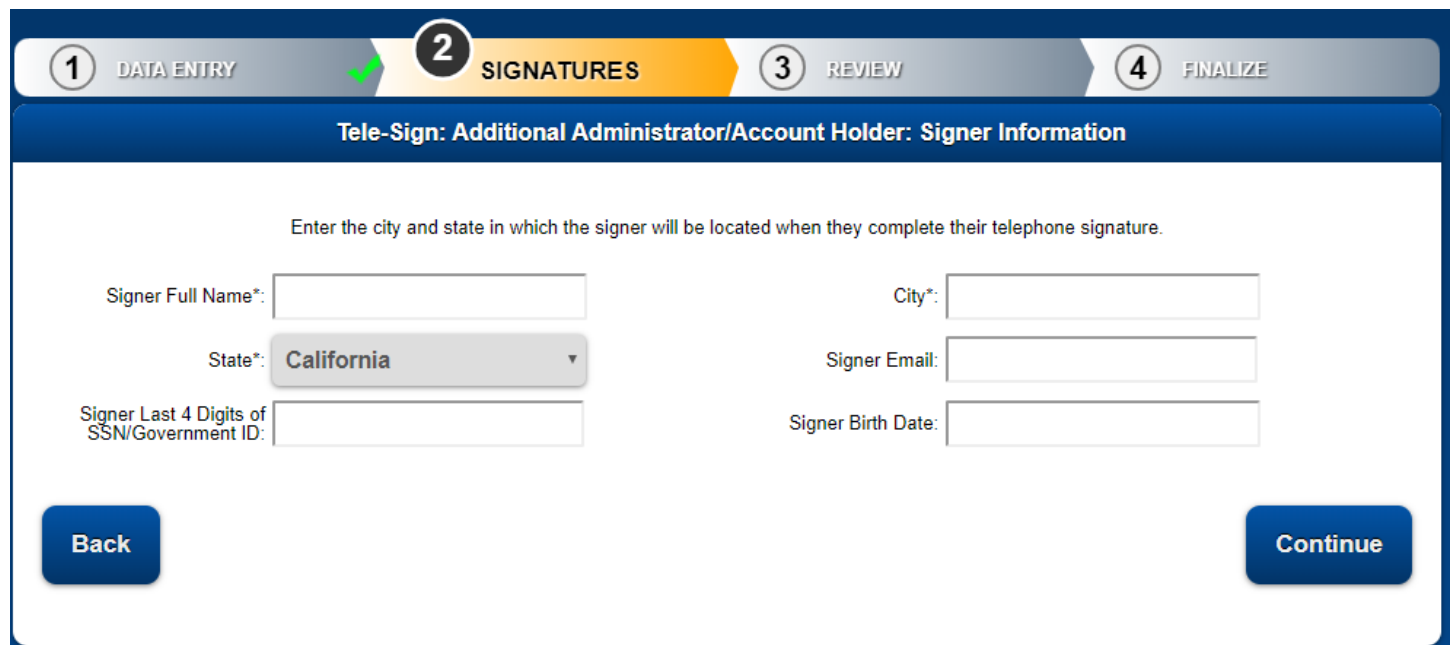
Add instruction text - "When ready, select "Continue" to complete the Tele-Sign process.

### Back Button

No change to existing functionality

### Continue

No change to existing functionality



1 DATA ENTRY 2 SIGNATURES 3 REVIEW 4 FINALIZE

**Tele-Sign: Additional Administrator/Account Holder: Signer Information**

Enter the city and state in which the signer will be located when they complete their telephone signature.

Signer Full Name\*:

City\*:

State\*: **California** ▼

Signer Email:

Signer Birth Date:

Signer Last 4 Digits of SSN/Government ID:

**Back** **Continue**

1 DATA ENTRY
2 SIGNATURES
3 REVIEW
4 FINALIZE

Tele-Sign: Additional Administrator/Account Holder: Form Access

It is required that the signer receive, read, and understand the purpose of the application being submitted. Please select the method of delivery below.

Delivery Type: Download

**Download Forms**

**Back** **Continue**

1 DATA ENTRY
2 SIGNATURES
3 REVIEW
4 FINALIZE

Tele-Sign: Additional Administrator/Account Holder: Form Access

It is required that the signer receive, read, and understand the purpose of the application being submitted. Please select the method of delivery below.

Delivery Type: Generate Link

Signer Last 4 Digits of SSN/Government ID: 1111

Signer Birth Date: 11/19/6012

**Generate Link**

**Back** **Continue**

1 DATA ENTRY
2 SIGNATURES
3 REVIEW
4 FINALIZE

Tele-Sign: Additional Administrator/Account Holder: Form Access

It is required that the signer receive, read, and understand the purpose of the application being submitted. Please select the method of delivery below.

Delivery Type: Send via Email ▼

Signer Name:

Signer Email:

Your Name: IT TESTER FULLNAME

Your Email: jkorzekwa@insurancetechnol

Signer Last 4 Digits of SSN/Government ID: 1111

Signer Birth Date: 11/19/6012

Subject: New Application - Address Search Wizard - Please Review \

Message:

Dear |CLIENT\_NAME|,

Use the link included at the bottom of the email to view the documents associated with your application.

Please use your birth date and the last 4 digits of your SSN to login.

If you have any questions please feel free to contact me.

Sincerely,

Send Email

Back
Continue

### Acceptance Criteria

- Relocation of existing fields per mock-up
- Elimination of Today's Date field
- Validation of Signer Information Page as described below
- Signer Full Name: Always Required
- City: Always Required
- State: Always Required
- Email Address: Not required
- Last 4 Digits of SSN/Government ID: Required if Birth Date is entered

- Birth Date: Required if Last 4 Digits of SSN/Government ID is entered
- The Back button cancels Tele-Sign and goes back to the list of signers
- The Continue button goes to the Form Access page
- Form Access Page:
  - If Last 4 or Birth Date were entered on the last page, they cannot be changed here
  - Last 4 and Birth Date should be filled in if they were entered on the last page
  - The Back button cancels Tele-Sign and goes back to the list of signers
  - The Continue button goes to the Agent Instructions page

## 1.2 Tele-Sign: Instructions on List of Signers Screen (212698)

Allow for Carrier Configuration of Signing Instructions

Configurable text specific to Tele-Sign should be available at the top of the signer page.

This text should only show up if Tele-Sign group option is enabled and the FLI\_ENABLE\_TELESIGN data item is set to True.

The text needs to be configurable on a per-client basis via localization.

Default text should be:

In order to use Tele-Sign, all non-agent signers must be selected.

### ***Acceptance Criteria***

- Verify default language or custom language are present as defined.
- This text should only show up if Tele-Sign group option is enabled and the FLI\_ENABLE\_TELESIGN data item is set to True.
- The text needs to be configurable on a per-client basis via localization.

## 1.3 Tele-Sign API to Return Signer Name Data (212392)

Currently, the applicant's name is not returned as part of the response in the Tele-Sign API. This causes IVR systems to state, "Record found for applicant", but cannot include a name. Data for the signer's first and last name has been requested to be added to the Tele-Sign API to correct this issue. This enhancement will allow IVR systems to read the name(s) of the applicant(s) to ensure it matches the caller's name.

### ***Acceptance Criteria***

- Tele-Sign API is enhanced to include first and last name(s) of the signer/applicant(s). Verify first and last name are present in payload.