
Signing Ceremony Updates

FIRELIGHT BASE



SIGNING CEREMONY UPDATES

Document Version: 1.0

Published: November 11, 2021

Insurance Technologies, LLC

Copyright © 2021 Insurance Technologies, LLC, all rights reserved.

Insurance Technologies, ForeSight® and FireLight® are registered or unregistered trademarks of Insurance Technologies, LLC (IT) in the USA and/or other countries.

ACORD, ACORD ObjX, ACORD OLifE, AL3, ACORD Advantage, ACORD XML, and "Association for Cooperative Operations Research and Development" are registered or unregistered trademarks of ACORD Corporation in the USA and/or other countries.

Microsoft, Microsoft SQL Server, Microsoft Internet Information Server, Windows, and other Microsoft names and logos are either registered or unregistered trademarks of Microsoft Corporation in the U.S.A. and/or other countries.

All other trademarks are the property of their respective owners.

The information contained in this document is current as of the date of the publication. Because Insurance Technologies, LLC must respond to changing market conditions and technology advances, Insurance Technologies, LLC cannot guarantee the accuracy of any information presented after the date of publication.

INSURANCE TECHNOLOGIES, LLC MAKES NO WARRANTIES, EXPRESSED OR IMPLIED, IN THIS DOCUMENT AND HEREBY DISCLAIMS ANY AND ALL SUCH WARRANTIES.

The material contained in this document is considered confidential and the intellectual property of Insurance Technologies, LLC. The recipient is given access to this material on the condition that the recipient (1) will keep the information confidential at all times, and (2) will not copy or modify or share the materials, except as expressly authorized by Insurance Technologies, LLC. The recipient should limit its disclosure of the information and materials only to its employees who have a clear business purpose and need to receive such information and materials and who are bound by confidentiality obligations to the recipient that are at least as protective of such information and materials as those contained herein.

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>

Table of Contents

iConnect 247449 Design Approach - Signing Ceremony Updates.....	4
1 (247449) Signing Ceremony Updates	4
1.1 Signing Ceremony: Data Item for Blank Default Jurisdiction-Signing Party Rules	5
1.2 Signing Ceremony: Create Blank Jurisdiction in Dropdown Menu (Signing Ceremony)	6
1.3 Signing Ceremony: Admin - Create New Signature Control Option	8
1.4 Signing Ceremony: Create and Set New Display Status	10
1.5 Signing Ceremony: Signature Control State Signing Errors for Owner Roles	11
1.6 Signing Ceremony: New Configurable Dialog Message	14
1.7 Signing Ceremony: Agent Email Generation	15
1.8 Signing Ceremony: Create New Email Template	15
1.9 Signing Ceremony: Update React ESign	16
1.10 Signing Ceremony: Application Audit Update	16
1.11 Signing Ceremony: Update Status Reports to include New Display Status	20
1.12 Signing Ceremony: Add a selection to Sales Agreement to limit states in dropdown during Signing Ceremony	22

iConnect 247449 Design Approach - Signing Ceremony Updates

Clients have requested enhancements to the signing process that will provide options for greater control of the jurisdiction match for the signing role in an activity.

1 (247449) Signing Ceremony Updates

Changes have been requested for the signing ceremony to ensure the state selected is the state where the activity is being signed, as well as the ability to default the jurisdiction to blank upon entering the signing ceremony.

For the jurisdiction match, a new selection will be available on the signature control through Forms Designer called, "State Signing Error". This option will be available to select per signing role (i.e.: Owner, Joint Owner). In a Remote Sign workflow, if multiple document sets exist, the jurisdiction match will apply to the signing ceremony for the selected role across all document sets for a total of five attempts. The number of attempts will not be per document set. When selected for the signer role, a new configurable base error message will be presented for the first through fourth attempt when the solicitation jurisdiction does not align with the signing jurisdiction. On the fifth invalid attempt, the activity status will change to a new display status of "Signature Submission Invalid". Audit records for the activity will be updated to include when the warning messages are displayed to the user and when the activity status is changed on the fifth invalid attempt. Once the activity is in the "Signature Submission Invalid" status, a new activity will need to be created/activity copied to proceed; the activity is no longer active or available for additional edits.

A new data item will be available to set the default jurisdiction to blank upon entering the signing ceremony via rules for the product. The blank jurisdiction default can be used independently of the jurisdiction match enhancement for the signature control, so clients may choose to use one of the signing ceremony enhancements, or both.

Impacts:

- New data item available to drive blank default signing jurisdiction via rules (FLI_SIGNING_ALLOWBLANK_JURISDICTION)
- New signature control option, "State Signing Error"
- New display status, "Signature Submission Invalid"

- Configurable base error messages for owner/joint owner role(s) for jurisdiction validation
- New Email Template
- Audit record updates

1.1 Signing Ceremony: Data Item for Blank Default Jurisdiction-Signing Party Rules

A new data item of "FLI_SIGNING_ALLOWBLANK_JURISDICTION" has been created to use in rules to default the jurisdiction to blank upon entering the signing ceremony. When this data item is used in rules, the jurisdiction for the designated signing parties will be blank, requiring the user to manually select the jurisdiction when signing instead of defaulting to a jurisdiction.

Sample Rules

- This sets the tag to be true only for a specific product:

```
<if>
```

```
<condition>
```

```
<compare op="==">
```

```
<diget dataitemid="FLI_PRODUCT_NAME" />
```

```
<const value="Insert Product Name" />
```

```
</compare>
```

```
</condition>
```

```
<diset dataitemid="FLI_SIGNING_ALLOWBLANK_JURISDICTION">
```

```
<const value="True" type="String" />
```

```
</diset>
```

```
</if>
```

- Set the tag to be true always

```
<diset dataitemid="FLI_SIGNING_ALLOWBLANK_JURISDICTION">
```

```
<const value="True" type="String" />
```

</diset>

Acceptance Criteria

- New data item "FLI_SIGNING_ALLOWBLANK_JURISDICTION" is created for rules.
- Rule can be used with new data item to default blank jurisdiction during signing (does not apply to client validation screen) when a presale goes into an e-Application. Example: Original activity is Illustration, Next Activity is e-Application.
- Rule can be used with new data item to default blank jurisdiction during signing (does not apply to client validation screen) for any activity that is not linked or has a parent/child relationship. (Example: brand new e-application with no previous linked activity.)

1.2 Signing Ceremony: Create Blank Jurisdiction in Dropdown Menu (Signing Ceremony)

The jurisdiction list currently does not feature a blank dropdown selection. Create a blank/empty dropdown selection that can be setup to use as a default for the product signing jurisdiction using rules with the data item "FLI_SIGNING_ALLOWBLANK_JURISDICTION". The blank jurisdiction dropdown selection will only be available for the signature capture screen when a rule is setup with this data item. Otherwise, the state list will be provided without a blank selection during the signing ceremony.

Signing Ceremony:

Acceptance Criteria

- Jurisdiction drop down selection on signature capture screen features a blank/empty selection available at the top of the list of states.
- Signing Ceremony jurisdiction on signature capture screen defaults to blank when data item "FLI_SIGNING_ALLOWBLANK_JURISDICTION" is set to true in rules.

- If "FLI_SIGNING_ALLOWBLANK_JURISDICTION" is not set in rules to default jurisdiction to blank, the jurisdiction will be defaulted to the jurisdiction originally selected for the activity for the signing ceremony.
- Blank jurisdiction is only available/displayed when the rule is set with the data item.
- Blank jurisdiction does not apply to the client verification screen.

1.3 Signing Ceremony: Admin - Create New Signature Control Option

Signature controls in the Forms Designer will feature a new selection available: "State Signing Error". This selection will be available for clients who wish to provide four error messages during signing before a fifth invalid attempt displays a final error message and the display status is changed to "Signature Submission Invalid". Once the activity reaches this display status after the fifth invalid attempt at a jurisdiction match during the signing ceremony, the application can no longer be submitted.

When there are multiple document sets, the total number of attempts will be for the entire package and not per document set. Example: 2 Document Sets - the total of 5 attempts is for both document sets and not 5 attempts per document set. (Applies only to Sign Now workflow)

The new "State Signing Error" differs from the existing "State Match Warning", as a final error will be provided on the fifth attempt and the user can no longer proceed with the signing ceremony in that activity. The "State Match Warning" provides a warning to the agent if there is a post signature review queue but will allow the activity to proceed. These two settings cannot be used in conjunction and therefore will not be allowed to be selected in the admin Forms Designer together. The setting selection boxes will act like a toggle in the forms designer signature control, only allowing one to be selected at a time.

New Selection in Form Designer for Signature Control:

Field Properties

Name:	Owner_Signature	
Top, Left:	897	38
Width, Height:	300	50
Font Size:		
Font Family:		
Font Color:		
Group Name:		
Signer Type:	Owner	
Control Type:	Signature	
Date Format:		
Data Group:	Owner	
Data Group Property:	AddressCountry	
Global Scope:	<input checked="" type="checkbox"/>	
Exclude from PDF:	<input checked="" type="checkbox"/>	
State Match Warning:	<input type="checkbox"/>	
State Signing Error:	<input type="checkbox"/>	
Use LexisNexis:	<input type="checkbox"/>	
Use SMS Text:	<input checked="" type="checkbox"/>	
Review Use Only:	<input type="checkbox"/>	
Z Order:	Bring to Front	Send to Back

Update **Close**

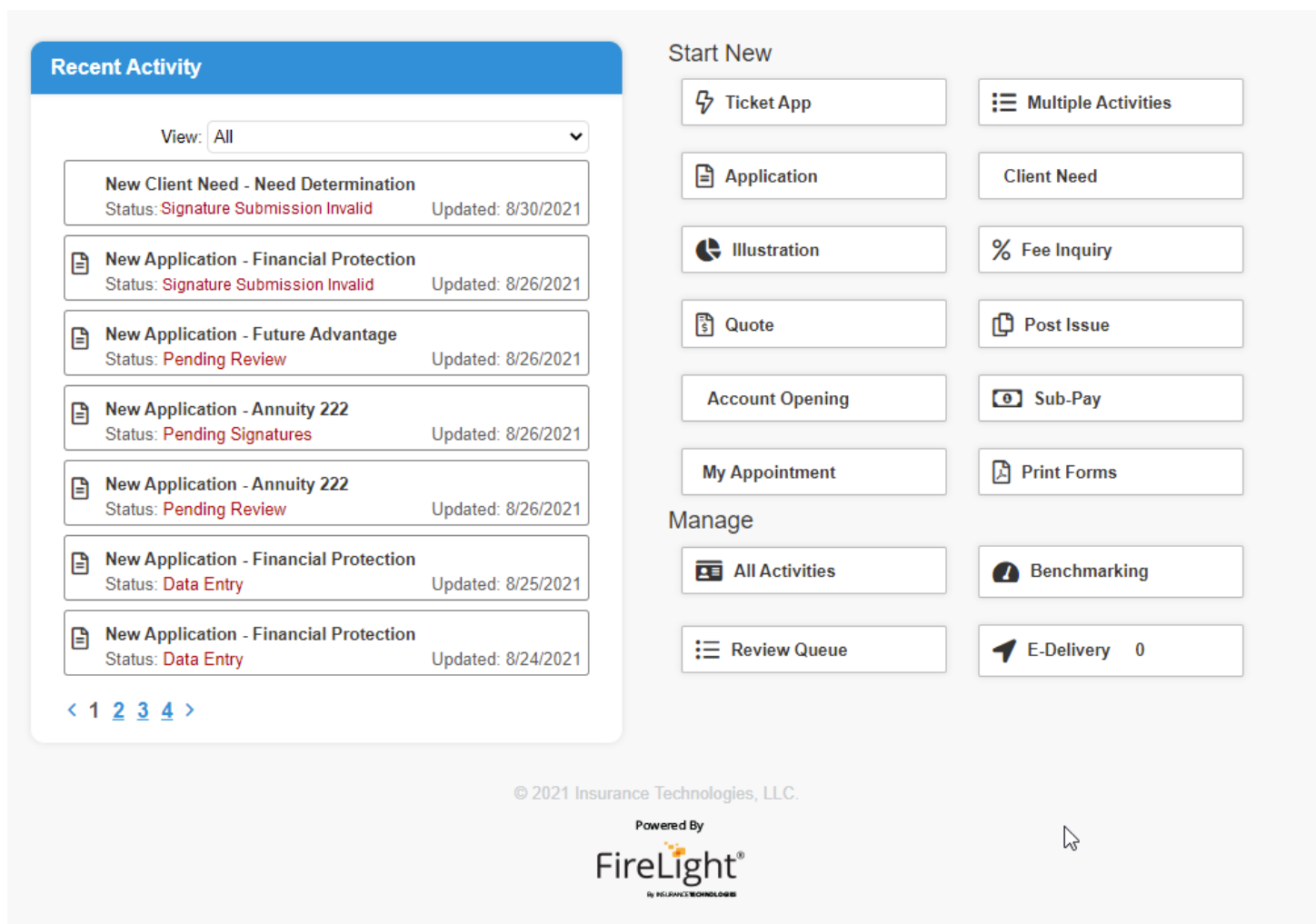
Acceptance Criteria

- New selection "State Signing Error" is available in Form Designer properties.

- "State Signing Error" and "State Match Warning" cannot be selected in conjunction, selections act as a toggle.
- "State Signing Error" can be set for all owner/joint owner roles.
- "State Signing Error" can be set for only one owner role (owner or joint owner).
- "State Signing Error" can only be set for Owner and Joint Owner roles. The Owner 2, Owner 3, etc. roles do not apply for this setting.

1.4 Signing Ceremony: Create and Set New Display Status

A new display status, "Signature Submission Invalid" will be created for use with the optional signing ceremony changes. Once the activity is in "Signature Submission Invalid" status, the activity becomes complete and cannot be unlocked.



The screenshot displays the FireLight user interface. On the left, the 'Recent Activity' section shows a list of activities with their status and update dates. On the right, the 'Start New' section provides buttons for initiating various processes. Below these, the 'Manage' section offers options for reviewing and managing activities.

Recent Activity	
View: All	
New Client Need - Need Determination Status: Signature Submission Invalid Updated: 8/30/2021	
New Application - Financial Protection Status: Signature Submission Invalid Updated: 8/26/2021	
New Application - Future Advantage Status: Pending Review Updated: 8/26/2021	
New Application - Annuity 222 Status: Pending Signatures Updated: 8/26/2021	
New Application - Annuity 222 Status: Pending Review Updated: 8/26/2021	
New Application - Financial Protection Status: Data Entry Updated: 8/25/2021	
New Application - Financial Protection Status: Data Entry Updated: 8/24/2021	

Start New	
Ticket App	Multiple Activities
Application	Client Need
Illustration	% Fee Inquiry
Quote	Post Issue
Account Opening	Sub-Pay
My Appointment	Print Forms

Manage	
All Activities	Benchmarking
Review Queue	E-Delivery 0

© 2021 Insurance Technologies, LLC.
Powered By
FireLight®
by INSURANCE TECHNOLOGIES

Acceptance Criteria

- New display status is created for all activities, "Signature Submission Invalid".
- Activities in "Signature Submission Invalid" status are complete.
- Activity can be copied from "Signature Submission Invalid" status if the Group setting User Rights Home/All Activities – Disable Copy Activities is not selected.

1.5 Signing Ceremony: Signature Control State Signing Errors for Owner Roles

Configurable base error messages will be added to display when "State Signing Error" is selected on the signature control for any individual signing role on an activity. When this setting is selected for the signing role(s) desired, the jurisdiction of the activity is required to match during the signing ceremony. If they do not match, a total of five error messages will be displayed to the user (the first four as warnings and the fifth fatal). For the Sign Now workflow, this will apply to all document sets in the signing ceremony for the role(s) with the signature control based on the total attempts across all document sets. Example: If there are two document sets, the maximum attempts will be five total across both sets; not ten.

Remote Sign Process:

- If the selected jurisdiction in the signing ceremony (signature capture screen) does not match the jurisdiction originally selected for the activity, a configurable base error message dialog will be presented.
- This (warning) error message will be presented no more than four times within a single activity for the individual signing role.
- If the jurisdiction does not match on the fifth attempt for the same signing role, a configurable base error message dialog will be presented.
- If the user has been presented with the fifth (fatal) error message, the activity can no longer be submitted.
- The display status will be changed to "Signature Submission Invalid".
- When the display status is changed to "Signature Submission Invalid", the activity can no longer proceed through the signing process for submission. The activity can be copied, unless Group settings selected prevent activity copy.

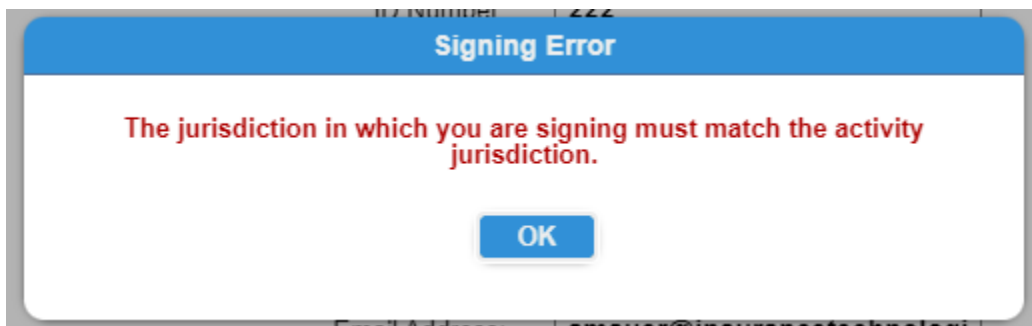
Sign Now Process:

- The jurisdiction match is not considered on the client verification screen.

- If the selected jurisdiction in the signing ceremony (signature capture screen) does not match the jurisdiction originally selected for the activity, a configurable base error message dialog will be presented.
- The user will be presented with an error message (warning message) no more than four times within a single activity for the individual signing role.
- The jurisdiction on the client identification screen is not included or considered for the jurisdiction match, as this could vary based on the client's source of identification. This page is used only for client identification verification purposes and not for the jurisdiction match.
- If the jurisdiction does not match on the fifth attempt for the same signing role, a configurable base error message dialog will be presented.
- If the user has been presented with the fifth (fatal) error message, the activity can no longer be submitted.
- The display status will be changed to "Signature Submission Invalid".
- When the display status is changed to "Signature Submission Invalid", the activity can no longer proceed through the signing process for submission. The activity can be copied, unless Group settings selected prevent activity copy.

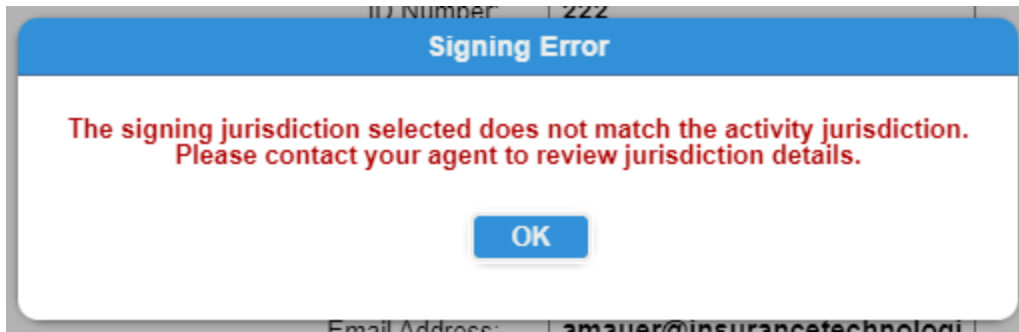
Default message for warning message (Messages 1-4):

"The jurisdiction in which you are signing must match the activity jurisdiction."



Default message for final message (Message 5):

"The signing jurisdiction selected does not match the activity jurisdiction. Please contact your agent to review jurisdiction details."



Acceptance Criteria

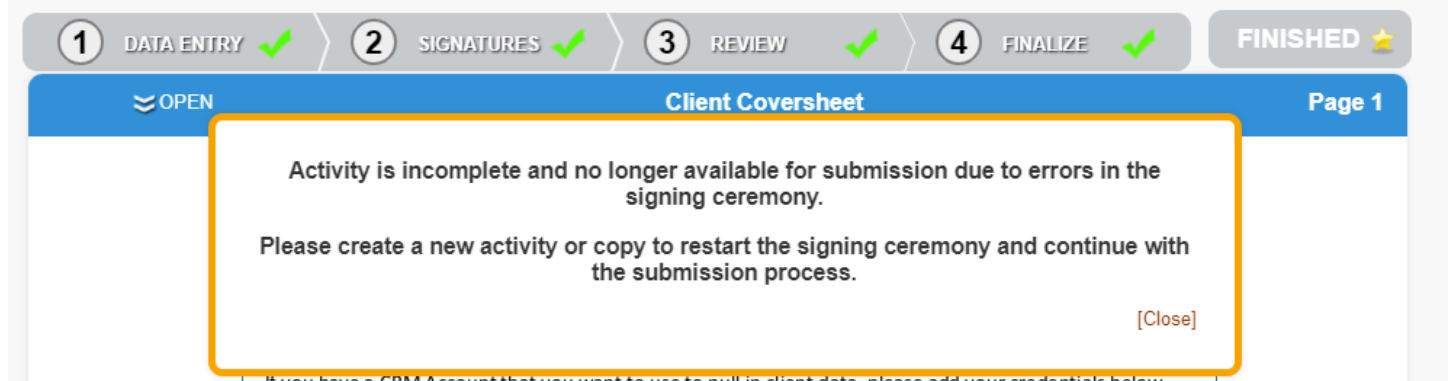
- Jurisdictions are required to match for the current activity when the admin settings are enabled for the signing role(s) within the forms designer.
- Signing roles have additional requirements that provide error messages as needed (Threshold is four warnings, followed by a fifth and final error).
 - Remote Sign
 - If the state selected in the original activity does not match the state selected at the time of signing (signature capture screen), a base configurable error message dialog is presented up to four times (4 consecutive jurisdiction mismatches for the same signing role).
 - If the jurisdiction does not match on the fifth attempt, a base configurable error message dialog is presented to the user.
 - Sign Now
 - If the state selected in the original activity does not match the state selected at the time of signing (signature capture screen), a base configurable error message dialog is presented up to four times (4 consecutive jurisdiction mismatches for the same signing role).
 - Client verification screen is not considered in the jurisdiction match, as it is only used as a means to verify client identity.
 - If the jurisdiction does not match on the fifth attempt, a base configurable error message dialog is presented to the user.
- When more than four attempts are made with non-matching jurisdictions for the same signing role during the signing ceremony, the display status is changed to "Signature Submission Invalid" after the fourth attempt.
- Activities with the status of "Signature Submission Invalid" can be copied to begin another activity, if the Group Setting "Disable Copy Activities" is not active.
- The owner signing requirements apply to Owner and/or Joint Owner roles. This is applicable regardless of natural or non-natural owner entities, as it is set at the signature control level by signer type.

- The jurisdiction match selection must be setup on the signing role(s) desired in the Admin Forms Designer for the Signature Control.
- When multiple document sets exist within an activity, the maximum number of five attempts is applied across all document sets per signing role; the number of attempts do not start over for each document set. The document set scenario will only be applicable to the Sign Now signing workflow.
- The "State Signing Error" is recommended to be used with the rules for the data item to set the jurisdiction to blank during the signing ceremony for the full user experience. If the jurisdiction is not set to blank it will default to the jurisdiction selected at the time the activity is created, so the errors will only fire if the user changes the jurisdiction during the signing ceremony.

1.6 Signing Ceremony: New Configurable Dialog Message

The status of the activity when changed to "Signature Submission Invalid" will display as "complete" at the top of the toolbar when in the activity/activity is re-opened. A new configurable message will be used to communicate to the user while in the activity or upon re-opening that the activity was not submitted and is not able to be completed.

Status Bar and Message Example:



Acceptance Criteria

- Activity status shows "Complete" when the user remains in the activity after changing to "Signature Submission Invalid".
- Activity status shows "Complete" when re-opened after changing to "Signature Submission Invalid".

- New toast message is presented to user when the user remains in the activity after status is "Signature Submission Invalid".
- New toast message is presented to user when activity is re-opened and status is "Signature Submission Invalid".
- Dialog message can be configured and localized.

1.7 Signing Ceremony: Agent Email Generation

When "Enable Auto Submit Email Notification" is active in Group, App, Email settings, the agent will receive an email notification for an activity when transitioned to "Signature Submission Invalid" display status. This will allow the agent to be notified of the failure during the client signing process so the activity can be recreated or copied and resent for client signatures.

Acceptance Criteria

- New "Invalid Signing" email is sent to the agent when "Enable Auto Submit Email Notification" is turned on in Groups and activity status is "Signature Submission Invalid".
- New "Invalid Signing" email is not sent to the agent when "Enable Auto Submit Email Notification" is turned off in Groups and activity status is "Signature Submission Invalid".
- Submit Reminder email is not sent to the agent for activities in "Signature Submission Invalid" status.

1.8 Signing Ceremony: Create New Email Template

A new email template will be created for use with auto generated emails when the status is changed during the signing ceremony for an invalid signature submission.

Email Category: Activities

Email Template Type: Signature Submission Error

Email Subject Line: <APPLICATION_NAME> Status Update: Signing Error

Email Template: Invalid jurisdictions were selected during the owner/joint owner signing ceremony for <APPLICATION_NAME> as of <DATE_TIME>. The activity is incomplete and no longer valid.

Acceptance Criteria

- Submit Reminder email is not sent to the agent for activities in "Signature Submission Invalid" status.
- New Email Template is created in Admin: Signature Submission Error.
- New "Invalid Signing" email is sent to the agent when Auto Generated emails are turned on in Groups and activity status is "Signature Submission Invalid".
- Data items in new email template are correct values when generated.
- Email template is localized.

1.9 Signing Ceremony: Update React ESign

Changes to the signing ceremony for rules to support default blank jurisdiction and the new signature control setting will require updates to React ESign.

Acceptance Criteria

- ESign is updated for Wizards to handle the blank jurisdiction default availability using rules for the new FLI data item.
- ESign is updated for Wizards to handle the new signature control setting.

1.10 Signing Ceremony: Application Audit Update

An audit message will be written out for the Signing Ceremony for the Owner and/or Joint Owner each time the warning message is displayed during the signature process. If the fifth and final configurable base message is presented to the user, a final audit record will also be written out.

Signing Ceremony for Owner and/or Joint Owner Audit Messages for 1st-4th warning message displayed (5th attempt was successful):

Sample View History:

History ✕

In Signatures

An email containing a link to the signed activity documents was sent to 'Valued Client' at address 'amauer@insurancetechnologies.com'.

Leave-Behind Email Sent
 11/11/2021 8:07:21 AM AST

In Signatures

Signing jurisdiction selected 'Idaho' does not match the activity jurisdiction.

Signing Ceremony
 11/11/2021 8:07:16 AM AST

In Signatures

Signing jurisdiction selected 'District of Columbia' does not match the activity jurisdiction.

Signing Ceremony
 11/11/2021 8:07:11 AM AST

In Signatures

Signing jurisdiction selected 'Connecticut' does not match the activity jurisdiction.

Signing Ceremony
 11/11/2021 8:07:07 AM AST

In Signatures

Signing jurisdiction selected 'Arizona' does not match the activity jurisdiction.

Signing Ceremony
 11/11/2021 8:07:03 AM AST

Sample Application Audit Report (after e-application was successfully submitted):

Packet Activity Audit			
Timestamp (UTC)	Session User	Status	Audit Message
11/11/2021 17:06	Abi_FLADEMO	Data Entry	New Application created by agent 'Back Office'. Application is currently unlocked and Active.
11/11/2021 17:06	Abi_FLADEMO	Pending Signatures	Application lock. Electronic signatures accepted.
11/11/2021 17:07	Abi_FLADEMO	In Signatures	Signing jurisdiction selected 'Arizona' does not match the activity jurisdiction.
11/11/2021 17:07	Abi_FLADEMO	In Signatures	Signing jurisdiction selected 'Connecticut' does not match the activity jurisdiction.
11/11/2021 17:07	Abi_FLADEMO	In Signatures	Signing jurisdiction selected 'District of Columbia' does not match the activity jurisdiction.
11/11/2021 17:07	Abi_FLADEMO	In Signatures	Signing jurisdiction selected 'Idaho' does not match the activity jurisdiction.
11/11/2021 17:07	Abi_FLADEMO	In Signatures	A notification that an application 'New Application - Financial Protection' is ready for agent signature was sent to 'Abi Mauer'.
11/11/2021 17:07	Abi_FLADEMO	Pre-Submit Review Complete	'Abi_FLADEMO' declined to use E-Approval processing.
11/11/2021 17:07	Abi_FLADEMO	Submit Requested	Activity 'New Application - Financial Protection' submitted with active group setting 'Allow Not in Good Order Submittals'.
11/11/2021 17:07	Abi_FLADEMO	Submit Requested	Activity 'New Application - Financial Protection' was submitted to the back-office systems for final processing.

Signing Ceremony for Owner and/or Joint Owner Audit Message for 5th message displayed:

Sample View History:

History X

Signature Submission Invalid

Signature jurisdiction exceeded the maximum number of acceptable attempts. Activity is no longer active.

Signing Ceremony

11/11/2021 5:12:57 AM AST

In Signatures

Signing jurisdiction selected 'Indiana' does not match the activity jurisdiction.

Signing Ceremony

11/11/2021 5:12:53 AM AST

In Signatures

Signing jurisdiction selected 'Florida' does not match the activity jurisdiction.

Signing Ceremony

11/11/2021 5:12:50 AM AST

In Signatures

Signing jurisdiction selected 'District of Columbia' does not match the activity jurisdiction.

Signing Ceremony

11/11/2021 5:12:45 AM AST

In Signatures

Signing jurisdiction selected 'California' does not match the activity jurisdiction.

Signing Ceremony

11/11/2021 5:12:41 AM AST

Acceptance Criteria

- New Audit record is added and available for display for all activity types on "View History" after the first warning message is presented to the user.
 - If the submission is continued and successful for an e-application, an audit entry will also be reflected on the "Application Audit" report.
- New Audit record is added and available for display for all activity types on "View History" after the second, third and fourth warning message is presented to the user.
 - If the submission is continued and successful for an e-application, an audit entry will also be reflected on the "Application Audit" report.
- New Audit record is added and available for display for all activity types on "View History" after the fifth and final fatal message is displayed.

- "Application Audit" report will not be available because e-application will not be successfully submitted once the fifth message is displayed.

1.11 Signing Ceremony: Update Status Reports to include New Display Status

All reports where statuses are reported will include activities in "Signature Submission Invalid" display status.

Activity Reports

AgentFirmSubmissionDetails

AgentPipelineActivities

ApplicationStatusReport

BillingSubmissionReport

BODTIDetailTransmissionReport

BOProdNameStatusSummaryReport

CarrierDistSubmissionByRoleByGroupByOrg

CarrierTransactionsByProductCategory

CarrierTransactionsByProductType

CarrierTransByDistributorByProductReport

CarrierTransByDistributorReport

CaseAccessVerificationReport

ClientCaseAccessReport

ClientSignDetail

CompletedApplicationReport

DetailDisplayStatus

DetailSubmissionByCarrierWithNames

DetailSubmissionStatus

DistDetailByCarrier

DistDetailCarrierByRoleCode

DistributorTransByCarrierByProductCategory

DistributorTransByCarrierByProductReport

DistributorTransByCarrierReport

DTIDetailSubmissionReport

EDeliveryProductSummaryReport

ExpirationDeadlineDateDetailedReport

PendingPurgeReport

PeriodSubmissionSummaryProdReport

ProdNameStatusSummaryReport

PurgedReport

QuoteActivitiesReport

ReviewQueueReleaseReport

StatusSummaryReport

SubmissionDetailReport

SubmissionSummaryActivityReport

SubmissionSummaryCarrierCodeReport

SubmissionSummaryCarrierReport

SubmissionSummaryDetail

SubmissionSummaryDTCCMemberIDReport

SubmissionSummaryProdLineReport

SubmissionSummaryProdTypeReport

SubmissionSummaryProductCodeReport

SubmissionSummaryRoleReport

SubmissionSummaryTransTypeReport

TrnSummaryDistReport

Admin Reports

AbandonedActivityReportProvider

AgentFirmPipelineReportProvider

AgentPipelineReportProvider

AgentSubmissionFirmReort

AgentSubmissionReport

ALZPreApplicationReport

ClientSignReportProvider

FullApplicationReport

HMLPipelineReport

InvoiceReport

SAGApplicationSubmissionReport

SAGConsumerPortalAbandonndReport

Acceptance Criteria


- Reports include applications in new display status on all reports where similar applications would display.
- Activities in "Signature Submission Invalid" display status will not be included in the count/summary for submitted activities.

1.12 Signing Ceremony: Add a selection to Sales Agreement to limit states in dropdown during Signing Ceremony

Clients have requested a way to limit the states displayed for selection in the dropdown menu during the signing ceremony. A checkbox selection will be added to the Sales Agreements, Sales Agreement Details, State Approvals tab. When selected, the list of states displayed in the signing ceremony will only display what is selected in the "State Approvals" tab. This selection will be, "Display approved states during signing ceremony". If this selection is not made for the product on the Sales Agreement page, the state selection dropdown will not be limited. By default, this checkbox will not be selected.

Sales Agreements

FL Access Carrier



Product	Agreement	
Accumulation Product	True	X
Annuity 222	True	X
Annuity 333	True	X
Annuity Care Plus	True	X
Annuity Freedom	True	X
Annuity Link	True	X
Annuity Rates DRAFT	True	X
Annuity Ticket	True	X
Aura Next III	True	X

Sales Agreement of "FL Access Carrier" for product "Accumulation Product"

Selling Org FL Access Carrier*

* By Org Will Indicate an active Sales Agreement

Product Name

More Info

Start End

Time Zone ▼

Replace Product Select Replaced Product ▼

Illust Services Role

Last Updated 8/13/2021 5:18 PM UTC

State Approvals
Back Office Script
Options

State	Approved
Alabama	✓
Alaska	✓
Arizona	✓
Arkansas	✓
California	✓
Colorado	✓

☐ Check/Uncheck All

☐ Display approved states during signing ceremony

Packages
Custom Lists

Available Packages

- Account Opening Application
- AM Annuity Package Application
- AM Life Package Application
- AM Tele-Sign Demo Application
- Annuity Forms Only Application
- Annuity Pkg - Wizard Only Application
- Annuity Rates DRAFT Application
- Aura Next Application
- BD Change - INS Post Issue

Assigned Packages

- Reviewer Document test Application
Package Duty Required ▼
- eConsent Application
Package Duty Required ▼
- Fee Inquiry_FIA Fee Inquiry
Package Duty Required ▼
- FIA Package Application
Package Duty Required ▼

Save Sales Agreement
Manage Sales Agreement

Acceptance Criteria

- New selection available on Sales Agreements, Sales Agreement Details, State Approvals tab for "Display approved states during signing ceremony."
- By default, the selection is not "checked".
- When "Display approved states during signing ceremony" is selected, the state list on the client verification page during the signing process is limited to the list of states displayed on the State Approvals tab on the Sales Agreement.

- When "Display approved states during signing ceremony" is selected, the state list on the signature capture page during the signing process is limited to the list of states displayed on the State Approvals tab on the Sales Agreement.
- When "Display approved states during signing ceremony" is not selected, the state list on the client verification page during the signing process is not limited to the list of states displayed on the State Approvals tab on the Sales Agreement.
- When "Display approved states during signing ceremony" is not selected, the state list on the signature capture page during the signing process is not limited to the list of states displayed on the Sales Agreement Details, State Approvals tab of the Sales Agreement.