



# RELEASE NOTES

SYMBILITY VERSION 6.0  
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## 2) INTRODUCTION

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This document describes the new features and enhancements that are part of the upcoming version 6.0 of Symbility Claims Connect and Mobile Claims. The target dates for this international release are:

- November 3<sup>rd</sup> in Canada
- November 23<sup>rd</sup> in the United Kingdom
- December 1<sup>st</sup> in the United States
- January 11<sup>th</sup> in South Africa
- January 16<sup>th</sup> in Poland
- January 18<sup>th</sup> in Belgium & Germany
- January 25<sup>th</sup> in Australia and New Zealand

## 3) MAJOR ENHANCEMENTS

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### Enhancement 313 – Wall Segment Tool for Diagramming

Insurance adjusters spend a lot of time drawing diagrams the damaged areas of the property in order to ensure the estimates they will write reflect accurate measurements. Oftentimes interior rooms are oddly shaped and can include multiple offsets. With release 6.0 Symbility has included a wall segment tool within the Room Diagramming utility to make the creation of these rooms faster for Mobile Claims Users.

The wall segment tool allows a user to create an offset to an existing room by setting specific 'break points' on an individual wall and then dragging the section of the wall between the break points outward or inward. This allows a user to create an offset precisely where they want to



create it (see Figure 1.0 below).

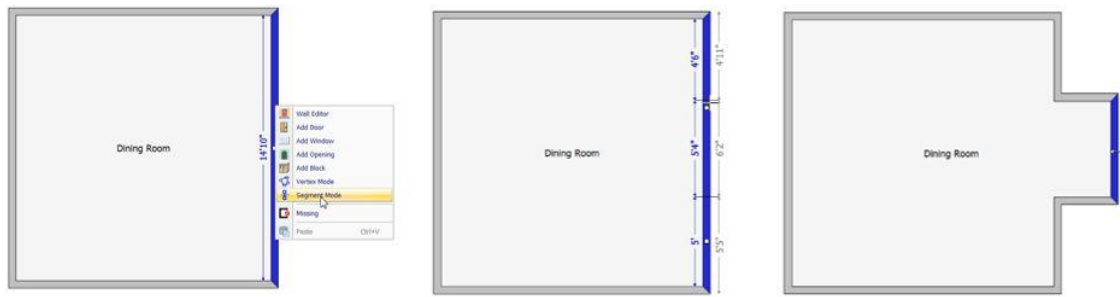


Figure 1.0

In addition to the wall segment feature another change to the floor plan diagramming has been made which allows a user to resize individual rooms that have a common wall. Previously, this was not available (see figure 2.1 & 2.2 below).

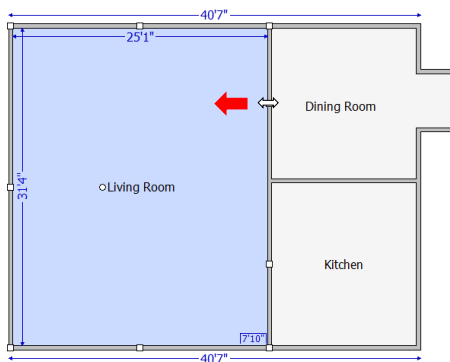


Figure 2.0

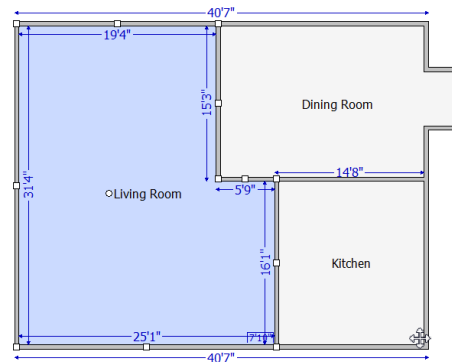


Figure 2.1

## Enhancement 326 – LINK-Ability to Load Videos

Video recordings of damage are quickly becoming a staple of many insurance company's remote estimating processes and especially when an adjuster is relying upon the policyholder for specific information in order to accurately estimate and settle the claim. With this enhancement Symbility has added the functionality of allowing a policyholder to record and upload videos inside LINK. Policyholders now have the ability to record video clips of damage using their smartphone or another device and then upload that video to Claims Connect using LINK. This is incredibly valuable for the inside insurance adjusters as many times the video was recorded either during or immediately following the loss event and the damaged areas have not yet been altered. They can then play the video directly from Claims Connect and get the information they need to more accurately assess the damage and write the estimate.

## 4) ENHANCEMENTS

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### Enhancement 316 – Enabling Group Assignment Process in North America

Symbility is an international company that serves many different markets around the world. The Group Assignment feature was developed primarily for the European market and will now be made available to the North American market with this release.

The group assignment feature gives companies the ability to have the system recommend specific user or vendor for claim assignments using a set of criteria. This criteria includes the creation of user groups, vendor workload, service territories (zip or postal code ranges) and then setting up the individual user or vendor accounts accordingly. The group assignment feature also incorporates the use of a calendar feature that tracks the appointments and schedule availability for each user which in turn helps determine availability.

Because of the power of the Group Assignment feature there is a certain level of set up that must be done in advance and it is recommended those companies desiring to begin using it should contact their Symbility Account Manager who can begin the process of setting it up.

### Enhancement 320 – Improve Assignment Received for Internal Assignments

This enhancement has to do with the previous need for a user in Claims Connect to manually mark the claim status *Assignment Received* when they received a claim. When a Claims Connect user is sent an internal assignment the status of the assignment will now automatically change to *Assignment Received* the first time they access the claim in Claims Connect.

### Enhancement 366 – Add Option for Sub-assignment to not Update Parent Assignment

A common workflow within Claims Connect is for an insurance company to create an assignment to an intermediary company and then for that intermediary company to in turn create an additional assignment (a sub-assignment) for another related vendor. A good example would be a water restoration company (an intermediary vendor) creating a sub-assignment to a hazardous material vendor to remove asbestos from the job site. Within this scenario often times both the



original assignee and the sub-assignee will set *job started* and *job completed* dates. In the past, these job statuses were not independent from one another which means when the sub-assignee would set *job started* and/or *job completed* dates it would also change the *job started/job completed* statuses for the parent assignment. Although this is a desired function for some claims, it is not the desired response when encountering a scenario such as the one listed above. This enhancement now gives an intermediary company the ability to turn off that behavior. It can be turned on or off by default on any specific Assignment Type in the *Assignment Type* settings or it can be turned on or off on within a claim on a per-assignment basis at the time the assignment is made thereby disconnecting the sub-assignment job statuses from those in the original assignment.

## Enhancement 373 – Create a Revision When Editing Estimate O&P and Taxes Settings

This enhancement addresses a need for flexibility in the way Overhead & Profit and Taxes are calculated against the payments within the Payment Tracker. Essentially, there are times when an insurance company may not initially turn on O&P and Taxes for an estimate until the insured has proven the repair work has been done and it is discovered that the repairs were more extensive than first anticipated. This enhancement allows the user to create a revision of the estimate in Mobile Claims or Claims Connect based upon the change of either of these values. The system then tracks these totals and they can be accessed for future payments.

## Enhancement 79 – Update to the Integration with Leica DISTO

Mobile Claims has long since had Bluetooth® integrations to the Leica DISTO™ laser measuring tools which are popular among contractors and adjusters. Newer models of the DISTO utilize the new Bluetooth 4.0 which is more flexible than the older versions. This enhancement now makes Mobile Claims compatible with Bluetooth 4.0 and allows users to connect with newer DISTO models. For those using the older models of the DISTO with the older Bluetooth version that integration will still be available as well so they will not have to upgrade.



## Enhancement 329 – LINK - Ability for Policyholders to Edit Captions, Rotate and Delete Photos/Videos

Policyholders using LINK will now enjoy greater flexibility when attaching photos or videos to their claim inside of LINK. With this enhancement a policyholder can now add a caption to each individual photo thereby saving a lot of time explaining each individual picture to the adjuster. Additionally, they can now rotate both photos and videos they have uploaded which saves them time and also helps the adjuster when they are attempting to view the pictures or the videos inside of Claims Connect. Additionally, the insurance company can turn on permissions for the policyholder to delete photos or videos they have uploaded to the claim.

## Enhancement 330 – LINK - Ability for Policyholder to Rename and Delete Documents

Very similar to the previous enhancement to LINK, policyholders now can rename documents they have uploaded into their claim in LINK. This avoids confusion with documents that have confusing names and documents that may have accidentally been uploaded by the Policyholder and need to be deleted because they are not relevant. Additionally, the insurance company can turn on permissions for the policyholder to delete documents they may have added.

## Enhancement 385 – LINK – Miscellaneous Enhancements

There have been a few smaller enhancements to LINK based upon feedback from Symbility customers. These enhancements serve to increase the flexibility of the tool and how data is displayed:

- The addition of an option to hide the overall repair progress percentage
- The removal of the name 'Symbility' in the emails and texts sent from LINK to policyholders to avoid confusion
- Ability to now trigger notifications when claims are closed
- The changing of wording to indicate that all journal entries come from the policyholder



## Enhancement 387 – LINK – Show all Future Events Involving the Policyholder

One of the primary purposes of LINK is to help keep the policyholder informed about what is happening with their claim. In an effort to do this better a new section has been added to the Status page that allows the policyholder to quickly see those events that will happen in the future. This will aid them in knowing what to expect versus just knowing what has already happened.

## Enhancement 402 – Redirect LINK Admin Notifications

Symbility support has traditionally been the first line of support for blocked accounts caused by users unsuccessfully attempting to log into Mobile Claims or Claims Connect. With the creation of LINK there are times when a policyholder experiences problems logging into LINK and the system will block their account based upon security protocol. Due to security requirements, Symbility is not authorized to work with the blocked policyholder's information. Therefore, this enhancement now allows notifications for blocked LINK accounts to go directly to the insurance company and specifically to the emails of their choice within their environment, thus keeping policyholder information under their purvey.

## Enhancement 380 – LINK – Notification when the Policyholder Uploads a Document, a Photo or a Video

As the functionality within LINK continue to grow so does the need for notifications. This enhancement addresses this need by allowing an insurance company user to set notifications for when a policyholder uploads a document, photo or video to the claim in Claims Connect. These new notification options will appear in the notifications list under the heading LINK. Each user can individually set these with the standard notification methods already set up for their account (email, text, etc.).



## Enhancement 377 – Add Risk Summary – Adjuster Field into Claims Summary Report

This enhancement allows greater flexibility and accuracy when identifying the claim owner in order to correctly track claim metrics. Many companies assign claims to suppliers with delegated authority and yet they still need a way to allow the claim owner to be an external person or company. This enhancement solves that problem through the user of the *Adjuster* field that is located on the Risk Summary screen that allows a company to select a user or an external company/user. This field will now be available in the Claims Summary report to enable the company to track the person responsible for the claim, regardless if they are an internal or external vendor.

## Enhancement 368 – Ability to Specify Assignment Notes Via the API

When creating an assignment for a claim within Claims Connect there is a *Notes* field at the bottom of the Assignment dialogue box that allows the user to type in specific notes for the assignee. Because many insurance companies bring over the assignment information from their CMS system via the API this *Notes* field has now been included in the API so assignment related fields containing notes about the claim or the assignment can now be transferred from the insurance company's CMS system into the *Notes* field for the claim in Claims Connect and therefore passed on to the assignee.

## Enhancement 299 – Claim Versioning: Enhancements to the API

The Symbility API allows for claim data (including claim documents) to be brought into a customer's claims management system. With this enhancement, the API is better able to identify what portion (or page) of the claim has been modified. This means the customer's CMS will only pull the updated page (i.e. estimate, photo, form, etc.) instead of having to pull the entire claim in again.



## Enhancement 405 – Add Option for API Notifications to Assignees

Certain companies use Symbility in very unique ways to facilitate their workflows and communication between their company and the insurance company. In order to accommodate some of these non-standard workflows a change has been made within the API options so that now assignees, other than the claim originator and the person who added, modified or shared a document, photos, form, etc. are also notified by the API if they are added to a claim.

## Enhancement 371 – Integration with ContentsExpress – Ability to Import Item Usage

Symbility has a powerful integration with Enservio's ContentsExpress. When a contents item is created in ContentsExpress often times the user will have entered a value for the *Usage* factor that is associated with the individual contents items. This usage factor is typically referencing how heavily the item had been used (new, light, normal, and heavy) and therefore is factored in when considering depreciation amounts. In the past this field was not a part of the contents line item that was transferred between both systems and because some States required this field it was necessary to include it as part of the integration. Therefore, with this enhancement the *Usage* data for all contents items will be imported with the line item when coming from ContentsExpress.

## 5) Resolutions

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### Resolution 399 – API Notification Update for Internal Assignments Should Include AssignmentID

This resolution solves an issue that was related specifically to the API notification when a claim is internally assigned or unassigned. The current notification that subsequently goes to an external system (the customer's CMS system) when a claim is assigned or unassigned did not originally include both the AssignmentID and the ParentAssignmentID. This resolution solves that problem so that now when a claim is assigned or unassigned the API notification includes these two date fields.

