Release Notes

Claims Connect and Mobile Claims
Version 7.0

Issue 1
May 3rd, 2023

Contents

Introduction

This document describes the new features and enhancements that are part of the upcoming version 7.0 of CoreLogic Claims Connect and Mobile Claims, including minor releases since 6.16.10x. The target dates for this global release are:

- May 24th in Australia, New Zealand, South Africa, Germany, France & Poland
- May 31st in Canada
- June 7th in U.K.
- June 12th in Belgium
- June 21st in the United States

Major Enhancements

New Claim Totals Page

This release introduces a new, dedicated Claim Totals page that will enhance both users and company administrators experience. Below is a list of some of the noticeable changes:

- The new Claim Totals page will correctly aggregate and display claim totals, limits, and deductibles as they apply to the claim and coverages.
- Users will have the capability to select estimates that should be included in Claim Totals calculations and are given more control to distribute deductibles at the claim level versus the estimate level.
- When viewing or printing the Claim Totals page, users will be able to determine if Taxes and/or Overhead and Profit are split out in detail or not and included in claim totals.
- The coverages (and their limits) set up on the Loss Summary page will be "claim wide", helping users to ensure that the total claim is within policy limits.
- New company preferences to automatically select estimates that should be considered part of the Claim Total and to apply a deductible directly to estimates by default.
- Capability for company administrators to include the Claim Totals page as part of printing profiles.

Minimum Charges Redesign

This release introduces important changes to how Minimum Charges are being handled. Mobile Claims and Claims Connect Users will now:

- See Minimum Charges displayed in the Estimate page instead of the Estimate Totals page.
- See Minimum Charges as part of the Estimate subtotal.
- Be able to edit most of the Minimum Charges properties just like regular estimate items.

Associating Assignments to Timeline Entries

This enhancement to Timeline entries provides the ability to notify specific participants or assignments in a claim as opposed to notifying all participants of the recipient company on the timeline. As a result, the association of assignments with timeline entries will allow:

- Users to notify participants of the assignments and filter/view timeline entries by assignments.
- Company administrators to set the default visibility behavior for timeline entries through Company preferences.
- API developers to specify recipient assignments and participants for the timeline entry notification and control timeline visibility for manual timeline entries added using APIs.

Configuration of Mandatory Assignment Statuses

Company administrators can now configure mandatory assignment statuses, preventing assignees from completing an assignment while various assignment statuses have been skipped.

Improvements to the Subroom feature

Mobile Claims users working with subrooms can now drag and drop an item in a specific room or area of the room instead of dropping them to all rooms of a subroom configuration. In addition, it is now possible to see what rooms or areas items are being applied to in the Items Details dialog box.

New capabilities for blocks placed on floorplans

This new feature in Mobile Claims now makes it possible for users to:

- Use Vertex mode on a block from either the Floorplan or the Wall editor
- Add blocks to non-90-degree angled walls in a diagram

Minor Enhancements

Adjuster License Number in User Profile

With this release, users can now add their adjuster license number (for each province/state they are licensed) to their user profile via the new Licenses tab. The license information will be displayed in various sections of Mobile Claims and Claims Connect.

In addition, users will be able to add their adjuster license number(s) to existing accounts or to newly created accounts. The adjuster license information can be manually added, added using the bulk import feature or via API.

New Template Reports

This release introduces two new template reports which will be available on Claims Connect in order to help companies analyze Assignee metrics.

- "Assignment Count by Month" will generate a report that provides data regarding Company Assignees, including their assignment count as measured over time.
- "Assignment Status Summary" will generate a report that provides data regarding Company Assignees and their claims count at identified Assignment Statuses.

Improvement to Preview Pane Behavior

This enhancement to Mobile Claims modifies the behavior of the preview pane when a user needs to expand it. When the preview pane is expanded, the comment section will expand to fit the pane while the image remains a fixed size and the text will wrap around the image as the size of the pane increases. The ability to click the image for a larger view remains the same.

Support for Multi-line Breaks in Comment tab of Item Properties

This enhancement to Mobile Claims provides the ability to break text across lines within the Comment tab of the Item Properties. This improves the readability of Comments by allowing line breaks. When a user adds Item Comments to their estimate, the line breaks visible in the comment will be preserved in the note as well.

Setting Advanced Search Names in Multiple Languages

This enhancement to the Advanced Search functionality allows Claims Connect users who have the capability to share searches, to save their searches with names in both the primary and secondary languages defined in their company preferences.

Print Profile Letterhead Behavior

This enhancement to Claims Connect modifies the behavior of the Print Profile Letterhead. Non-insurance company administrators are now able to use the "Claim Originator as default" letterhead for assigned claims.

When the "Use claim originator default letterhead" is ON, the Claim Originator's Company Default Letterhead will be used as the selected letterhead.

When the "Use claim originator default letterhead" is OFF, there are two options:

- The "Company Default" letterhead will be used
  or
- A specific letterhead from the company's list

Completing CAPTURE Questionnaires when Offline

It is now possible for CAPTURE users to complete questionnaires offline (or when the connection is lost while filling out a questionnaire and the user wishes to complete it). With this enhancement, a completion request will be automatically generated and queued for processing as soon as the application is back on-line, allowing users to complete the questionnaires without having to trigger the completion request again.

Notifying User when New CAPTURE Version is Available

With this new release, CAPTURE users will be notified when a new version of the application is available to download and install, ensuring they are using the latest version available.

"Assignment (New UI)" question type in CAPTURE

This new feature allows users to utilize a question in a CAPTURE questionnaire to create a new assignment for a claim participant directly from the application, eliminating the need to go back to Claims Connect to create the new assignment.

The following assignments can be created using the question type:

- Create a new vendor assignment
- Create a new user assignment
- Create a new external assignment

or

- Automatically select the best available

CAPTURE users will need to contact their Account Manager to add this functionality to their custom CAPTURE questionnaires.

Displaying Text Annotation for Photos in CAPTURE

Text Annotation has been enhanced to enable CAPTURE users to view a photo and instantly see any text annotations that were added to it, as well as edit text annotations without entering the Edit mode.

Updating List Custom Fields with Questionnaire Answers

With this new capability, questionnaires can now be configured to update claim "List" type custom fields from answers to dropdown and radio button questions. This will allow Claims Connect user's answers to dropdown and radio button questions from Desk Adjuster and CAPTURE questionnaires to appear in “List” type custom fields on the Summary page.

Addition of unique IDs for claims, assignments, estimates to various list and reporting themes

This release introduces the addition of new ID columns (for API purposes) to the following lists and Report Builder (Beta) themes:

	Claim ID	Assignment ID	Parent Assignment ID	Estimate ID	Root Estimate ID	Parent Estimate ID
Claim List	x					
Assignment List	x	x	x			
Estimate List	x	x		x	x	x
Report Builder - Claim Theme	x					
Report Builder - Assignment Theme	x	x	x			
Report Builder - Estimate Theme	x	x	x	x	x	x

Addition of 'root estimateID' to API notification

When an API notification (both SOAP and REST) is sent for an estimate status change, the ID for the original version of that estimate is now included as a part of the notification.

Timeline API Notifications

Partner companies are now able to receive notifications about new timeline entries that have been added that are either authored by or tagged with an assignment for which the "Allowed" option associated with that partner company is enabled.

Suppressing User Notification Subscriptions for Claim Automation

During Claim Automation configuration, there is now a secondary action available to users to suppress User Notification Subscriptions where an estimate status change has been set as the primary action. Suppressing the Notification Subscriptions will eliminate the 'call to action' notification that is not needed as the Estimate Status has progressed through Claim Automation.

Selecting multiple items on the Estimate Page

This enhancement to Mobile Claims now makes it possible for users to select multiple estimate items using a selection option in the form of a check box. This new selection option is present next to the following objects on the Estimate Page:

- Line items
- Line Item Group by value
- Text
- Titles
- Notes
- Photos
- Voice annotation

New Notification Options

This release introduces new notification options so that users can be automatically notified when a claim participant either uploads or shares documents, photographs, or videos.

Resolutions

Multi-Language Display in Lists - Inconsistent settings between companies

This resolution addresses the issue of seeing unexpectedly named search criteria that occurs in Advanced Search when companies and their vendors do not have an exact match for fields in both the primary and secondary languages.

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