



RELEASE NOTES

SYMBILITY VERSION 5.11
SCOTT WIENS, PASCAL BÉGIN

1) CONTENTS

1) CONTENTS.....	1
2) INTRODUCTION.....	2
3) MAJOR ENHANCEMENTS	2
a) Enhancement 33955 – Symbility LINK.....	2
b) Enhancement 25289– Allow for User Editable Dates for Statuses.....	3
c) Enhancement 36436 – Integration with SightCall.....	3
4) ENHANCEMENTS	4
a) Enhancement 34916 – Estimate Review Queue/Improvements to Tasks.....	4
b) Enhancement 35554 – Add Condition Information to Depreciation.....	4
c) Enhancement 34918 – Ability to Import Photos from Another Claim.....	5
d) Enhancement 34283 – Ability to Add a Field of Type “Payment Line Items Table”	5
e) Enhancement 34168 – Ability to Manually Enter ACV Amount in Payment Tracker	6
f) Enhancement 33565 – Make Address Line 1 Mandatory when Creating a Claim.....	6
g) Enhancement 35760 – Add Variable Deductible Fields to Form Editor	6
h) Enhancement 34919 – Default Tasks Filter.....	7
i) Enhancement 35762 – Give All Companies the Ability to Map the Industry Type of Loss to their Type of Loss	7
5) RESOLUTIONS.....	7
a) Resolution 34188 - Items Without Recoverable Depreciation Should Never Show as ACV Paid	7
b) Resolution 34522 - Fix how Remaining Amount Payable is calculated.....	8
c) Resolution 35993 – Fix How Mobile Claims Status Change Synchronizes with Claims Connect.....	8
d) Resolution 33799 – Business Intelligence – Fixes to the French Version.....	8



2) INTRODUCTION

This document describes the new features and improvements that will be part of version 5.11 of Claims Connect Mobile Claims and applications. The launch dates abroad are:

- August 19, 2016 in Canada
- September 2, 2016 in the US
- September 8, 2016 in the UK
- September 15, 2016 in Australia and New Zealand
- September 22, 2016 in South Africa
- September 27, 2016 in Belgium and Poland
- September 29, 2016 in Germany

Release 5.11.10X (which includes three enhancements identified within the release notes) has the following launch dates:

- September 9, 2016 in Canada
- September 15, 2016 in the UK
- September 23, 2016 in the US
- September 29, 2016 in Germany
- October 6, 2016 in Australia & New Zealand

3) MAJOR ENHANCEMENTS

a) Enhancement 33955 — Symbility LINK

The quality of the relationship between the insurance company and the policyholder is a key measurement of success for an insurance company. Each generation of policyholders brings new challenges and ways in which customer satisfaction is achieved and measured. The current generation of policyholders desires visibility into their claim that goes beyond the traditional phone call with their adjuster or reading reports. This desire for increased visibility drives this major enhancement to the Insured Portal.

Symbility LINK is a means by which a policyholder can engage in their claim, track its progress, and provide information and feedback without having to speak with the insurance company. The new portal is a responsive, highly readable and user-friendly web application, accessible by the insured from their computer, tablet or smartphone.

Some of the primary features and capabilities of the insured portal include:

- Access via PC, Tablet PC or smartphone (responsive web application)
- Claim progress bar for quick reference of key milestones in the claim progress
- Ability to quickly verify the claim settlement amount and claim reports and third-party contact information, including the adjuster and contractors



- Ability to receive desired notifications on claim events
- Ability to upload documents and pictures
- Ability to send messages to the insurer

b) Enhancement 25289– Allow for User Editable Dates for Statuses

An exciting enhancement for 5.11 is the ability to edit the dates for specific statuses within a claim, giving the user flexibility in the event they were not able to record the status when it actually occurred. A user can now go into their assignment, change a status, and then change the date to correctly reflect the day it happened. With this enhancement comes the added ability for a user to go into the Assignments dialogue box and enter in multiple statuses at one time, without being required to close and re-open the Assignments screen for each status change.

This option can be toggled off and on based on each company's business needs. For more information or to enable this feature, please contact your Symbility Account Manager.

c) Enhancement 36436 — Integration with SightCall¹

Video Connect is a video collaboration tool that allows an adjuster to conduct an inspection remotely by connecting to a policyholder's smartphone. In version 5.11 Symbility integrates the powerful SightCall technology to power an improved version of Video Connect. This new version has many of the same capabilities of the previous version, and some new features not previously available. Specifically, Video Connect powered by SightCall provides the following new capabilities:

- The adjuster does not need to install software but rather works online on SightCall's *Administrative Portal* to initiate a Video Connect session
- Cloud storage capability for videos and photos.
- Faster connection time because of the significantly smaller end user app (9 MB)
- Availability of two-way video so the insured can see the adjuster, if a company desires this feature.

¹ This enhancement will be available in release 5.11.10x which will only be for Claims Connect and will follow release 5.11.



4) ENHANCEMENTS

a) Enhancement 34916 — Estimate Review Queue/Improvements to Tasks

The Tasks feature within Claims Connect is used to create, assign and schedule various tasks for a claim. This enhancement to the Tasks feature adds additional flexibility to an already great tool.

As part of this enhancement, new columns have been added to the Task List to help the user see more information about the various tasks. These include a 'Task Trigger Type' and a 'Task Trigger Detail'. These two columns provide an explanation as to what triggered the task (i.e. an assignment or an estimate status) and the detail of that trigger (i.e. reinspection assignment or estimate name).

Another significant change within this enhancement is the creation of a new Task Status. This allows a user to see if a task is pending (has not been assigned to a user), in progress (assigned but not completed), cancelled (for tasks that are cancelled before they are assigned), and completed (tasks that were successfully assigned and completed).

Also new with version 5.11 is the expansion of task filters. Additional Task Filters have been added to optimize users' searches for their Tasks. The Task Filter page now includes four tabs, categorizing the filters into the categories of Tasks, Dates, Claims and Assignments.

Furthermore, a Task Panel has been created for easy access to tasks from the main Claims Connect window. When in Task mode, the Task Panel appears on the right side of the screen, displays the information for the selected task and allows the user to edit the task status without having to open up the Tasks feature.

Finally, companies who wish to manage tasks in Excel can now export Tasks to Excel via an option at the bottom of the Task List. The export will include the applied filters and the document would be automatically saved in the user's 'Downloads' folder.

b) Enhancement 35554 — Add Condition Information to Depreciation

Recently some States have required depreciation to factor in a "wear" factor for each item as well as the age/useful. Now, two identical items with the same "useful" life setting can be valued differently based on the wear each item has experienced. A good example would be a door to a guest bedroom versus a door on a hall bathroom. While the two doors are identical, the bathroom door is used far more frequently and is in potentially worse condition (wear) than the guest bedroom door.



Symbility has addressed this by adding a material condition factor labelled 'wear' to the depreciation for a material that will reflect the wear on that item. When calculating depreciation, an adjuster will now be able to select a wear factor depending on the condition of the item they are replacing. This new wear condition, when used within the depreciation setting, will be factored in with the useful life setting resulting in a more accurate depreciation amount.

There are four wear conditions that were created with this feature:

- New
- Light
- Average
- Heavy

Although Symbility has set default factors for each wear condition, administrator users will be able to edit these in the Claim Defaults section of Claims Connect.

c) Enhancement 34918 – Ability to Import Photos from Another Claim

Working with photos within Mobile Claims has always been simple and this enhancement lends the process further flexibility. Users will now be able to move photos between claims, which can be particularly useful when photos are imported into the wrong claim or if a company has chosen to use two separate Symbility claims to represent one single claim in their systems.

Specifically, this enhancement includes the following functionality:

- From the claim they are working in, users can use the Import tool to first select the claim they want to import photos from, then select individual photos or entire photo pages to be imported
- Users can cut or copy photos from a photo page within a claim and then paste them into the destination photo page in a new claim.
- All annotations associated with the photos will be transferred with the photos

d) Enhancement 34283 – Ability to Add a Field of Type “Payment Line Items Table”

The Payment Tracker feature has received an enhancement enabling users to generate reports on line items that have been tracked and paid. This new enhancement will allow Symbility Account Specialists to create forms for our clients that will display which line items have had payments recorded within the Payment Tracker, and help companies track which items within an estimate have been paid and which items have a payment outstanding.



e) Enhancement 34168 — Ability to Manually Enter ACV Amount in Payment Tracker

The second Payment Tracker enhancement in release 5.11 enables users to manually enter an ACV amount for a payment item, instead of accepting the system generated ACV amount, a need that arises when an error was made as the payments were entered. This enhancement allows the user to change the ACV payment to reflect what the insurance company has indeed paid.

f) Enhancement 33565 — Make Address Line 1 Mandatory when Creating a Claim

In response to requests from customers using the API, an enhancement has been made that allows a company to make the “Address Line 1” field mandatory in both the Loss Address and Insured Address when manually creating a new claim. This change ensures the claim information in Symbility mirrors the information in an insurance company’s policy system.

This change is available as an option in a company’s settings and needs to be enabled by a Symbility Account Specialist. This feature only affects companies creating claims manually and will not impact companies with active API’s in place or who are not manually creating claims in Symbility.

g) Enhancement 35760 — Add Variable Deductible Fields to Form Editor

Often, when a company is creating forms with estimate and claim totals, they include the deductible with these calculations. Previously, the only deductible field available was a field labeled *Deductible* which returned the total deductible amount for the claim. With the addition of the Variable Deductible feature released in version 5.8, a need arose to have additional deductible fields available for reporting purposes.

The new deductible fields that have been added through this enhancement are directly related to when the RC/DEP/ACV mode is selected on the Estimate Total Tab. Specifically the two additional deductible fields are:

- *Deductible Additional* – This field pulls its value from ‘Total Additional Deductible if Total Depreciation is Recovered’ in the Estimate Total tab when RC/DEP/ACV mode is selected
- *Deductible ACV* – This field comes into play when using more than one coverage for estimate line items. The Deductible ACV field reflects the sum of the values of each coverage in the estimate total tab when the RC/DEP/ACV mode is selected.

With these new fields, claims that utilize a variable deductible can now be accurately represented within reports containing claim totals.



h) Enhancement 34919 — Default Tasks Filter²

This enhancement to the Claim Tasks feature enables users to set a specific Task List filter as their default filter upon opening the Task List. Users can now either select an existing custom filter and set it as their default or create a new custom filter and set that one as their default. Once the default is set, the user will be presented with a Task List that reflects that custom filter. As with other filters within Claims Connect, the user can change this default at any time.

i) Enhancement 35762 — Give All Companies the Ability to Map the Industry Type of Loss to their Type of Loss ²

Within the Business Intelligence feature there is the capability to compile industry reports. Previously, only companies that were using the BI module could map their claim *Type of Loss* to the *Industry Type of Loss* which resulted in a limited number of claims being factored into industry reports. This enhancement enables BI to include all companies in the aggregate claim data for industry reports using the Type of Loss field.

5) RESOLUTIONS

a) Resolution 34188 - Items Without Recoverable Depreciation Should Never Show as ACV Paid

This resolution is designed to bring more accuracy to the ACV paid line within an estimate. In the past, items that had the 'recoverable depreciation' turned off (meaning the depreciation that was taken on this item is non-recoverable) would still appear as ACV Paid in the estimate page even if they were totally paid.

² This enhancement will be available in release 5.11.10x which will only be for Claims Connect and will follow release 5.11.



b) Resolution 34522 - Fix how Remaining Amount Payable is calculated

This resolution solves a problem that occurred when Payment Tracker users were applying payment amounts that were different from the amounts generated by the system. Previously, the difference between amounts impacted the remaining payable amount. This resolution solves this issue and ensures the remaining payable amount is now properly calculated.

c) Resolution 35993 – Fix How Mobile Claims Status Change Synchronizes with Claims Connect

This resolution primarily impacts Symbility customers that utilize an API between Claims Connect and their CMS and focuses on the synchronization process from Mobile Claims to Claims Connect. When a Mobile Claims user synchronizes a claim that has status changes as well as diagrams, photos, reports, etc., there are times when the API will fire before the entire claim can be uploaded from Mobile Claims resulting in an incomplete claim record on their CMS. This resolution addresses this problem by changing the way the claim is sent to Claims Connect.

d) Resolution 33799 – Business Intelligence – Fixes to the French Version

Within the Business Intelligence module in the French version a few minor changes were required to correctly display data and data field labels. Most of these changes were cosmetic in nature having to do with alignment and grammar/spelling.

