



RELEASE NOTES

SYMBILITY VERSION 6.1
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2) INTRODUCTION

This document describes the new features and enhancements that are part of the upcoming version 6.1 of Symbility Claims Connect and Mobile Claims. The target dates for this international release are:

- April 13th in Canada
- April 19th in the United Kingdom
- April 26th in Belgium
- May 11th in the United States
- May 17th in Germany
- May 24th in South Africa
- May 31st in Australia and New Zealand

3) MAJOR ENHANCEMENTS

Enhancement 331 – LINK-Gathering Policyholder Feedback

Symbility continues to develop LINK through this enhancement which now gives Symbility customers the ability to glean feedback from their Policyholders. The new feedback request feature utilizes a single question which the Policyholder can quickly answer using a rating from 1 to 5 stars. The Policyholder is also able to provide optional written comments within a text field if they wish to elaborate on their reasons for their selected rating or if they wish to provide any general comments about their claims experience.

Specifically, this feature includes the following capabilities:

- Ability to set up and configure feedback requests within Claims Connect which can be viewable by Policyholders in LINK.
- Feedback requests can be automatically triggered by specific claim events (inspection completed, assignment completed, etc.) so the Policyholder is prompted to respond to the event and give their assessment. Each of these events contain their own set of pre-defined questions the insurance company can chose to use for the feedback request.
- Feedback requests can be manually sent to the Policyholder by a Claims Connect user or they can be set as 'Always On' where a Policyholder can provide feedback from various places within LINK whenever they wish. This enables a company to select a specific question related to each area.



- Feedback results are accessible in the Reports section of Claims Connect in a specific Report Template allowing a company to assess responses and break down these responses by various different categories (vendor, adjuster, etc.)
- Feedback responses are logged and become part of the timeline/journal for a claim

4) ENHANCEMENTS

Enhancement 349 – LINK-Ability to Customize Notifications

The ability for a Policyholder to set notifications within LINK is very important in order for them to stay informed on activities within their claim during the claim cycle. This enhancement expands the notification capabilities within LINK. Specifically, companies can now perform the following changes to Policyholder notifications:

- Customize the title of the notification to match their own company nomenclature.
- Customize the content of the notification such as the text, re-ordering or removing of some of the elements, etc.
- Specify a different content for Policyholder notifications.

Companies wishing to customize these notifications should contact their Symbility Account Manager.

Enhancement 458 – LINK-EULA

Another enhancement for LINK is the ability to allow insurance companies to create their own LINK End User License Agreements (EULA). This enables them to use their own EULA versus the default Symbility LINK EULA. Additionally, if an insurance company has more than one writing company and has a LINK profile for each one, they now can create individual EULA's for each brand. Companies wishing to create their own EULA should contact their Symbility Account Manager.



Enhancement 443 – Desk Adjuster-Ability to Approve an Estimate through Fulfillment Route

As part of the continued development of the Desk Adjuster product an enhancement has been added that now gives a user more options for changing the estimate status. This change allows for routes to be defined in such a way that they will take an estimate to the 'approved' status instead of 'completed'. The purpose of this enhancement is that it gives the user more flexibility as it relates to working with estimates and streamlines that function by eliminating the need for the user to go back into the claim in the Claim Explorer and making the changes there.

Enhancement 319 – Desk Adjuster-Ability to Negotiate the Repair Options Prices with the Policyholder

When desk adjusters are attempting to close a claim they often times come to an agreement with the Policyholder on an amount that is different from either the estimate amount generated by the Desk Adjuster script or the amount from a contractor quote which they may have recorded. In order to accommodate this scenario we gave a company the ability to enter in a negotiated amount in order to settle the claim. This option will appear in the Repair/Route screen in the Desk Adjuster which is where this would typically happen in the claim workflow. As part of the initial setup, a Claims Connect administrative user would go to the Repair/Route Options portion of the Company Preferences screen and create a Negotiated Settlement route. Once set up, all Desk Adjuster users now have the ability to select the negotiated settlement option when needed. If this option is selected, the user would enter in the new settlement amount, text explaining why they chose this option and then move to the next step.

Enhancement 367 – Build-Out Tool for Diagramming

The Break Tool within the diagramming utility has also received an enhancement in Release 6.1. This new enhancement allows a user to 'build out' a new room off an existing one without needing to select a new room shape from the menu bar. In this way a user can create new rooms quickly and with relatively little effort.



Enhancement 403 – Improvement on How Photo/Video/Documents are Shared within a Claim

This is another enhancement that affects both LINK and Claims Connect users. Essentially, this enhancement provides more controls regarding the sharing of photos, videos and documents between the various entities within a claim.

- Documents: A user can now share a document with specific companies or only or with the Policyholder.
- Photos: A users can now restrict the sharing of photo pages or individual photos to certain companies or the Policyholder.
- LINK: When a Policyholder adds photos, documents or videos they can now select what companies on the claim they wish to share them with.

These newly expanded controls can also can be set as defaults for LINK users. However the Policyholder and the other claim participants can still manually select the claim entity they wish to share any of the three types of attachments with.

Enhancement 457 – Ability to Force all Manual Journal Entries to be Visible by the Originator

A new optional setting is now available that would automatically make all manual journal entries visible for the claim originator (typically an insurance company). This means the claim originator would automatically be selected and could not be unselected when any assignee creates a manual journal entry inside a claim. This assures the originating company can see all manual journal activities for any given claim and thereby have full access to all claim activity. Companies wishing to activate this feature should contact their Symbility Account Manager.

Enhancement 426 – On Forms Show Estimate Name Only Without Attaching Originator Name in Brackets

This new option allows a company to hide the company name (often times the originator name) beside the estimate name on forms. Companies wishing to update their forms in this way should contact their Symbility account Manager.



Enhancement 428 – Prevent Companies from Entering SSN/ITIN in Claims Connect

Symbility added an EIN (Employer Identification Number) field to the system quite some time ago and made this field visible inside the vendor list of Symbility users. However, some single user Independent Adjusters are using this field for either their Social Insurance Number, their Social Security Number or their ITIN (Individual Tax Identification Number) and therefore creating the possibility of identity theft. This enhancement will now prevent the ability to enter and save any of these three numbers in this field. Additionally, any customer accounts that currently have any of these numbers within EIN field will have that data removed and therefore no longer visible within the Symbility Claims Connect customer database.

Enhancement 475 – GDPR – Modify Privacy Policy and Security Policy

Protecting customer user data has always been the highest priority for Symbility. Per the GDPR (General Data Protection Regulation) adopted by the European Union, changes have been made to the language within both the Privacy and Security Policy statements within Symbility products to reflect Symbility's compliance with these regulations.

Enhancement 474 – Remove Personal Data from Notifications Communicated Outside Symbility Environments

Related to Enhancement 475, this enhancement addresses the use of notifications for all Symbility users within the EU. With this enhancement, personal data will no longer be communicated within the text or email notifications set up in Claims Connect. This personal data includes the Policyholder's name and address, the user's name or phone number and text content for all manually created journals. However, all internal notifications will not be impacted by this new regulation as they occur within the Symbility environment and are protected by Symbility's data security.



Enhancement 429 – Changes to Vendor Assignment Report

This enhancement to the Vendor Assignment Report now allows a company to include multiple sub-assignments for any direct assignment within the report. This is accomplished through an added column in the report for Assignment Status (Sub) directly after the External Assignee (Sub) column. Additionally, filter options for Assignment Sent (Direct) and Assignment Completed (Direct) have been added.

Enhancement 472 – Enable Desk Adjuster for Any Company Participating in a Claim

An enhancement was made to allow any company working on a claim to utilize the Desk Adjuster module including intermediary companies. With this enhancement the 'assignment association selection window' will now appear every time a Q&A script is launched within Desk Adjuster by any company. This allows the user to select which assignment to associate the estimate to in situations where the user is the assignee in a claim with less than two assignments. Companies wishing to enable this capability should contact their Symbility account Manager.

5) Resolutions

Resolution 384 – Subcoverages- Amount Payable

The subcoverages feature within Symbility is used by companies to accommodate sublimits under specific coverages. As part of the continued development of this feature this enhancement addresses the ability to ensure the sublimits for subcoverages are applied correctly to the Amount Payable field for the calculations to come out correctly.

