CoreLogic®

SYMBILITY

RELEASE NOTES

VERSION 6.3

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1) Contents

2) Introduction

This document describes the new features and enhancements that are part of the upcoming version 6.3 of Symbility Claims Connect and Mobile Claims. The target dates for this international release are:

- February 28th in Canada
- March 14th in Australia, New Zealand, and South Africa
- March 19th in Germany, Belgium and Poland
- March 21st in the U.K.
- March 28th in the United States

3) Major Enhancements

New User Interface for Advanced Search (Version 6.3.10)

Searching for claims in Claims Connect just got easier.

The Advanced Search feature was completely redesigned to make it simpler to find the claims that you are looking for and analyze your data.

The user can now build search queries by typing your desired criteria in a search bar at the top of the page. Claims Connect will automatically propose suggestions while typing to make sure the user can locate the right field in the vast list of fields that are available.

Having access to different fields offers a lot of flexibility, but it can also be intimidating. That's why we created a "Commonly used fields" section to list criteria that are often used when searching for claims. Clicking on each field gives the user access to more information about that field and let them see examples of how it can be used in a search. The new search bar also provides guidance on how to use each field, which operators are available, how to search for multiple values, etc.

As before, the user can save your queries and share them with the rest of their team. These searches will be just one click away, easily accessible from a panel at the left of your claims list. And last but not least, Claims Connect will now remember the last search that was run even when the user navigates elsewhere within the site. This will help the user focus on claims that matter to them.

The new Advanced Search was designed to simplify the search experience and allow the user to build searches easily and quickly. Stay tuned as more updates are on the way to make that feature even more powerful and allow you to perform even more complex searches.

4) Enhancements

New 'Job Not Sold' Assignment Status

This enhancement allows a contractor, who was assigned a claim, to indicate if they were successful in selling their restoration / repair services to the insured. This information can be entered using the new 'Job Not Sold' assignment status available to the contractors on both Claims Connect and Mobile Claims. This new assignment status is also available in our reporting tool allowing companies to easily report on claims that were successfully sold or not.

API – Add 'ExternalSystemCompanyCode' to 'GetClaim' call

When using the 'GetClaim' command to retrieve data from a claim, the Company Codes defined in the API setting will now be returned as part of the data for each company participating in the claim.

Ability to Export Unfiltered BI Report Data to Excel

This enhancement now gives the Business Intelligence user the ability to export either All Report Data or Current View data as desired when exporting a drilled down report to Excel.

Ready for Guidewire ClaimsCenter 9

Companies using Guidewire ClaimsCenter 9.0 can now use the 'Ready for Guidewire' accelerator to integrate with Claims Connect.

Change how Taxes and Overhead & Profit are Calculated

A change has been made to how taxes and overhead & profit are calculated within a claim. Previously, they were calculated on the subtotal of the estimate. With this change, taxes and overhead & profit are now calculated per line item level.

Support Basic Authentication for API Notifications

This enhancement has to do with a change to the Symbility API notifications. An additional type of API notification was created in order to better communicate with some third party CMS systems.

Notify Policyholder Option for API ‘AddClaimJournalEntry’

An option was added to the ‘AddClaimJournalEntry’ call within the API to specify if the insured can see a particular entry and be notified of it. This gives an expanded notification option for insurance companies wanting the insured to be selected and notified when creating a journal entry.

Ability to Customize Configuration Admin Privileges

A new user account within Claims Connect is now available to all companies. It is similar to an Administrator user account with the exception that the users with this user type cannot run reports and nor can they modify an existing user account to give it report access.

5) New Claims Connect User Interface Enhancements

Claims List Enhancements

i. Easier to Use Quick Search Feature

When a user clicks on the Quick Search field, any existing text in the field will be selected by default, allowing the user to simply start typing to enter a new search without having to delete the existing text.

Tasks

i. Tasks List

The Tasks list has now been fully updated inside then new Claims Connect user interface. The user can access the new Tasks List by clicking on Tasks in the main menu at the top of their screen. The new user interface allows users to filter the list and open a task which will display details in a blade that will slide out. The user can also access the actions panel for the task and can open up the claim the task is related to just by clicking on the claim number.

ii. Tasks Tab Inside a Claim

From within a claim a user can now click on the Tasks tab and view all tasks related to that specific claim. As with the Task List, the user can view the task details via the task blade and has access to all the actions that can be taken on the task.

Documentation Enhancements

iii. Ability to Export an Estimate to Excel

This enhancement now allows a user to export an estimate to Excel directly from the Documents page. This is done using a new command located in the "…" menu of an estimate in the Documentation page. In order to use this feature it will need to be activated for that company. This can be done by contacting Symbility Customer Support or your Account Manager.

Other User Interface Enhancements

i. Ability to Search or Filter Guest User Accounts

Users can now search the Guest User accounts list using the following data elements:

- Contact Name
- Username
- Email
- Phone or Cell

Additionally, a user can filter the list to show Guest Users in their own company or any of their company's branches.

ii. Improved Behavior When a User's Session Times Out

For security reasons a user's session will time out if it is inactive for too long. However, with this new enhancement, when the user logs back in, they will now be taken back to the last page they were viewing versus back to the Claims List where the user usually lands when they log in for the first time.

6) Resolutions

New Depreciation Fields Added to Forms

This resolution is related to how depreciation values were displayed inside of forms. New depreciation fields were added to Forms to simplify the calculation of recoverable depreciation within a form.

Single User Independent Adjuster Company Type – Make User Role 'Adjuster' by Default

When a Single User Independent Adjuster (SUIA) initially sets up their user account they sometimes forget to select their role as 'Adjuster'. This prevented the user from being selected as the Adjuster on the Loss Summary page. With this resolution, when a SUIA first sets up their account the user role will default to ‘Adjuster’ thereby avoiding it being left blank and causing the issue described above.