



CoreLogic®

SYMBILITY

RELEASE NOTES

VERSION 6.5

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2) Introduction

This document describes the new features and enhancements that are part of the upcoming version 6.5 of Symbility Claims Connect and Mobile Claims. The target dates for this global release are:

- November 13th in Canada
- November 21st in Australia, New Zealand, and South Africa
- November 25th in France, Germany, and Poland
- November 28th in the U.K.
- December 2nd in Belgium
- December 4th in the United States

3) Major Enhancements

Advanced Search in Assignment List

The Assignment List in Claims Connect is used to track and manage Assignments within claims. This enhancement focuses on giving advanced searching capabilities to the Assignment List in order to help users better manage their Assignments. Specifically, the new advanced search feature within the Assignment List will include:

- The ability to conduct advanced searches using the same search UI that is available within the Claims List
- A new panel to the left of the actual list of Assignments with a list of 'default categories' (similar to 'My Claims' and 'All claims' in the Claim List) which would include such categories as 'My Active Assignments', 'My Active Vendor Assignments', and 'Flagged Assignments'.
- The ability for a user to save searches within the Assignment List
- The ability to access saved searches quickly from the Assignment List
- Remembering the last search that was performed in the Assignment List and applying it automatically

Advanced Search using Rolling Date Ranges

The ability to use rolling date ranges has been added as part of the ongoing improvements to the Advanced Search feature. This enhancement will now allow a user to select rolling date ranges such as 'This Week' or 'Last X Days' in addition to the ability they currently have to set specific date ranges (Sept 10th, 2019 through Sept 17th, 2019). This gives the user the ability to quickly search these types of ranges without having to enter in specific dates. This enhancement will also help eliminate the need to edit dates that are included in saved filters that are used on a regular basis such as filters for end of the week or month reports.

Examples of these rolling date ranges are:

- Today
- Yesterday
- This Week
- This Year
- Last X Hours
- Last X Days
- Next X Weeks
- Next X Months

Ability to Search Claim/Assignments for Empty Fields

Another enhancement made to the Advanced Search is the ability to search a specific field that has been left blank inside of a claim versus not searching for that field at all. This enhancement is designed to help users search for claims with specific data fields that may be missing from claims. For instance, if a user wanted to search for all the claims in their current claim list that had the field 'CAT No.' left blank, they can now select the 'is empty' option in the 'CAT No.' field and the search results will return all those claims that had no value entered in the 'CAT No.' field. Additionally, this search can be combined with another selection such as CAT No = '123' OR 'is empty'.

Automatic Saving of List Options

Within the Claim and Assignment lists inside Claims Connect the user has always been able to utilize the many different claim data filters available in order to find the information they seek and then save those filters. This enhancement now adds the saving of the specific columns and orientation of the columns within a saved filter. In this way, a user doesn't have to re-select and reorient the desired columns every time they pull up a specific saved filter.

4) Minor Enhancements

New Columns & Grouping in Assignment List

As part of the continued UI enhancement of the Assignment List, new columns have now been added that will make it easier to analyze data related specifically to assignments. Additionally, a user can now group assignments that were made by a particular company using the field 'Assignment Sent by (company)'.

Ability to Flag Assignments

This enhancement involves giving the user the ability to flag assignments in the Assignment List similar to how claims can be flagged within the Claim List. Assignments can now be flagged in

the Assignment List and the user can also choose to filter the list to only show flagged assignments.

Expansion of 'Plot on Map' Feature

Enhancements have been made to the 'Plot on Map' feature that will give users greater flexibility when working with claims from the map view. They are as follows:

- More information is now shown on the map including things such as claim status, age, etc.
- The ability to select claims and perform actions on them such as 'assign' or 'participate', etc.
- The ability to remove claims from the map.
- The ability to go to the Google Street View for a selected claim.
- The ability to flag a claim.
- The ability to view a summary of the assignments made by the user's company.

Reporting Defaults to Last Claim List Search

The claim filter applied when Reporting (in Report Builder or Report Templates) will now default to the last search used in the Claim List. From now on, when a User will try to run a report, the name of the last used search (My Claim List, My Flagged Claims or name of a saved search) will be displayed above the report settings. To change the filter settings, the user will need to click on the search name and they will be redirected to Search of the Claim List where they will be able to update their criteria. If the user uses "Clear" to remove the current filter, then the legacy Advanced Search will be displayed and the user will then be able to enter new filters but will not have options to use features such as the rolling dates or "is empty".

Current Reports Panel

As part of the ongoing transition of moving all functionality in Claims Connect to the new UI, the Reporting Queue has been updated to now include a progress panel. This progress panel appears as a small panel at the bottom right-hand corner of the screen when exporting a List or generating a report. This panel will show the status of each report that is generating, and allows the user to open the report in HTML, PDF, or XSLX format once completed. This report progress panel also allows the user to dismiss a report from the panel and simply access it from the Report Queue itself.

Ability to Upload and View Videos in Claims Connect

More and more companies are writing estimates within Claims Connect and often times they are needing to access a video of damage that is stored on other cloud services. With this enhancement Claims Connect users can now upload and view videos that are stored on Amazon AWS. For CoreLogic | Symbility customers wishing to learn more about this feature please contact your Account Manager.

Option for Assignee to be Able to Change Claim Status

This enhancement allows an Originator to give an Assignee the ability to change the claim status without having to give them the full rights of Delegated Authority. This allows Originators to include claim status change rights yet still limiting permissions.

Add Writing Company/Originator to Repair/Routing Business Rules

An Intermediary within the Symbility environment often times works for multiple clients. These clients may give the Intermediary a list of vendors or users who are approved to work claims for them. The Intermediary will handle these different vendor and user lists by creating a different user group for each of their clients. These user groups can now be linked to assignment types which in turn are linked to Repair/Route Options. Specifically:

- A 'Writing Company' and 'Originator' can now be included as a variable for inclusion when using the 'Repair/route options assignment process' which provides an assurance that only their specific 'Repair/route options' are being used.
- Rules and conditions can now be copied from one list to another.

Timeline Only Displays Visible Repair/Route Options

When reviewing the Timeline within a claim, only the visible routes that were available for the user when they selected the repair/route option will be displayed for the repair option selection. This avoids the confusion caused by options appearing that were not available to the user at the time of the assignment.

Associating Vendor/User Lists to Assignment Type

Another enhancement within the repair/route options is related to the associating of a vendor/user list to an Assignment Type so that it will automatically be selected when a user assigns the claim using the repair/route options. Now, when a user assigns a claim using repair/route options and selects a specific route that uses the Vendor or Internal users assignment pages, the Group defined within the Assignment Type that was set for the route should automatically be selected. This eliminates the need for the user to manually select the correct User/Vendor group.

Improve the Labeling of Assignment Types for LINK

Within Claims Connect, Assignment Type labels can be very specific and detailed in order to correctly describe its intended use. These Assignment Type labels can be specific to certain workflows, vendors or user groups, originators, etc. and can be confusing to a policyholder when viewing them within LINK. This enhancement allows a company to still use detailed Assignment Type label and descriptions yet provide a simpler Assignment Name which the policyholder would see within LINK.

Ability to Order SkyMeasure Wall Reports

With this enhancement users of the SkyMeasure aerial services can now order wall reports. When placing a SkyMeasure order the user will be able to select if they want a roof report, wall report or both. Upon completion of a wall report order a user will be able to generate an exterior plan and view the Wall Report PDF in Documents.

API – Import or Retrieve Diagram XML files

Options have been added to the API that allow a third party system to import a roofplan and/or exterior plan directly to Claims Connect, or retrieve a diagram xml that already exists in the claim. All diagram xml files imported manually or via the API will also now show in Documents.

API – Add Claim Questionnaire

An external system can now create a questionnaire and prefill some of the answers using a new API method. This will allow a user to use a third-party app to answer questions and then submit them to Claims Connect. A Claims Connect user can then complete the questionnaire in Desk Adjuster and generate the estimate and/or forms. For CoreLogic | Symbility customers wishing to learn more about this feature please contact your Account Manager.

5) Resolutions

Save Estimate when View Repair Option is Selected

This enhancement is directly related to the editing and saving of an estimate within Claims Connect. When a user is editing an estimate and clicks on 'view repair options' without saving them, the system will automatically prompt the user asking them if they want to save and apply their changes to the estimate before moving to the repair options step. This eliminates the possibility of them forgetting to apply and save their changes before going to the repair options page and possibly selecting a settlement route based upon the old estimate information.