



## Release Notes NA – Symbility version 5.9

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Effective Date:	11/05/2015
Version:	1.1



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## 1.0 introduction

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This document describes the new features and enhancements that are part of the upcoming version 5.9 of Symbility Claims Connect and Mobile Claims. The target dates for this release are:

- November 20, 2015 in Canada
- December 4, 2015 in the US

## 2.0 major enhancements

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### 2.1 enhancement # 32119 - business intelligence

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The Business Intelligence module in Symbility Claims Connect has some helpful enhancements within the 5.9 release.

**Cycle Time:** One of the first enhancements is the ability for the user to view cycle time measurements in days, hours, minutes or a decimal format. This gives the user another view in addition to the current percentages.

**Customized Start and End Points for Cycle Time Measurements:** Another functional enhancement to the Business Intelligence module is the ability for the user to customize the start and end points for the cycle time measurements. This customization will be very helpful when wanting to view specific segments of the claim cycle.

**Additional Dashboard Options:** The Business Intelligence module has also been enhanced to allow a user to filter the dashboard by Loss Types and States which will in turn affect all the other panels of the Dashboard. These filters can be saved and accessed for quick filtering purposes.

Also, we have improved how users can interact with the Dashboard by allowing them to automatically generate Template Reports directly from the Dashboard. For example, if the user clicks on number of External assignments sent available from the Claims & Assignments panel, the Business Intelligence module will automatically open a new tab and display the Assignment Cycle Time interactive template report using the filters defined on the Dashboard.

**Interactive Reports Enhancements:** Reports are a vital part of viewing claim data. Version 5.9 contains enhancements to the interactive reports to give users more options for working with data within reports. To begin with, the top row and the left columns within the interactive report can now be frozen so the user can scroll either down or across and still see the column and row identifiers. Additionally, the interactive reports will now go through a validation to ensure the user has populated the required fields for the report. Finally, the Interactive Reports now contain a filter option for Assignment Sent to allow users to use that dimension for filtering their reports quickly.

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**Custom Fields Within Interactive Reports:** Version 5.9 now allows company administrative users to select specific custom fields they wish to have appear within the Business Intelligence module. These fields are available in both the Standard and Custom Interactive Reports for their company and will appear as columns at the bottom of the list.

## 2.2 enhancement # 32120 – desk adjuster

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The Desk Adjuster module within Claims Connect has undergone some significant changes with regards to the user interface and the addition of some other very helpful features. The new user interface is an entirely new look for those users who are logged in as 'Desk Adjusters' with the goal of creating a user experience more specific to the desk adjusting function. In the place of the Claim Explorer the user now has a simplified commands panel on the left side with a Progress Control ribbon along the top which acts as a chronological claims handling checklist. This custom interface has been designed specifically for desk adjusters to help guide them from the first view of the Loss Summary information through the estimate scripts and then onto Repair Options and claim closure by clicking on the 'next' button as they progress through each step.

This new progress control ribbon is also enhanced with tool tips that help explain available actions to the user as well as give guidance in filling out the claim information accurately. The user will also have the ability to add photos, documents, forms and contractor quotes and additionally will have access to the Symbility integration partners their company is using such as SkyMeasure, Enservio and WeatherFusion.

## 3.0 enhancements

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### 3.1 enhancement # 22661 – self-assignment of claims

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Claims Connect and Mobile Claims allow a user to self-assign a claim. In version 5.9 this functionality has been enhanced to now allow a user within Claims Connect to assign themselves a claim even if they are already participating in the claim. Additionally, Mobile Claims users working in the Claims Connect tab can select a claim they are not currently participating in on Mobile Claims. From here they can choose to be added as an Assignee, then Mobile Claims will prompt them to either choose between selecting an existing assignment and creating a new one.

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## 3.2 enhancement # 26732 – new vendor option – allow editing of o&p percentage

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Insurance companies can now allow or disallow vendors and their assignees to edit Overhead and Profit settings. This new setting is available from the Vendors page within Claims Connect. This setting will be inactive by default for new and existing companies.

## 3.3 enhancement # 30064 – include assignment notes in email notification

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Assignment notes can be entered at the time of assignment to give the assignee specific information about that assignment. Typically, the assignee would read these notes upon receiving the claim inside of Mobile Claims. However, often companies want the assignees to read these notes immediately upon notification that they have received an assignment, typically via an email notification. This enhancement allows assignment notes to be placed directly into the email notification where the assignee can view these notes without having to view the claim within Mobile Claims or Claims Connect.

## 3.4 enhancement # 32965 – improvements to forms

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Previously, if a user had a form that was pulling data from either the custom fields or the Q&A fields and that form was imported in a new claim (might be a parallel claim) the linked fields in the form were not copied over. With the enhancements, the companies will be able to set their forms so the fields that are pulling the data from the custom fields and Q&A fields will copy the data over when imported to a new claim.

## 3.5 enhancement # 32968 – improvements to keyboard usage for fields

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This enhancement gives users a better experience when filling out forms within Claims Connect and Mobile Claims by allowing more keyboard shortcuts and functionality. The enhancements now allow users to move between fields more fluidly with the keyboard, activating things like drop down selection menus, date fields and moving through check boxes with keystrokes such as up and down arrows, escape and enter keys.

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## 3.6 enhancement # 32970 – change behavior – originator assignment should not be the active assignment if there is another assignment available

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With this enhancement a minor modification has been made to the assignment portion of a claim. When a claim is opened in Mobile Claims by a user and that user is both a participant of the originator assignment and an assignee of an internal assignment, the internal assignment will be activated by default.

## 3.7 enhancement # 33129 – integration with Enservio ContentsExpress: ability to import settlement report

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Symbility's integration with Enservio ContentsExpress has undergone an enhancement regarding the ContentsExpress Settlement Report. The Settlement Report contains the totals for the contents estimate and can now be downloaded in PDF format which is attached to the claim. This new functionality provides Symbility users the ability to get the PDF of the Settlement Report directly from ContentsExpress without having to go into the ContentsExpress interface, thereby saving time. The report will be available to be downloaded manually and can be automatically updated when the claim is closed within ContentsExpress.

## 3.8 enhancement # 33752 – ability to assign multiple claims when 'group assignment' is enabled

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Companies using the 'Group Assignment' feature previously were not able to assign batches of claims manually. This enhancement gives Claims Connect users the ability to manually assign multiple claims at the same time even if their company is using the 'Group Assignment' feature. If a user decided to assign a single claim, the system automatically takes the user to the Group Assignment page. However, if the user selects multiple claims and clicks on 'Assign Selected Claims', Claims Connect will now display the Assign Claim window and allow the user to select either internal or external assignees and then select the appropriate assignment type for these new assignments.

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## 4.0 major resolution

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### 4.1 resolution # 32551 – client issue: cannot edit file number as originator – power user

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This resolution solves a client issue regarding the editing of the 'File No.' field within Claims Connect. This resolution allows Standard and Power Users of the originator file to have the ability to edit the 'File No.' field within Claims Connect.