



symbility
MSB DataDriven

RELEASE NOTES Release 5.2.64A

Version 1.2

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Revision History

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1. Introduction

This document describes the new features and enhancements that will be part of the upcoming version 5.2.64A of Symbility Claims Connect and Mobile Claims. The target date for this release is August 23rd 2013 in North America.

2. Major Enhancements

2.1 Enhancement # 21328 – Automatic assignment / Calendar tools

Symbility now gives its users the ability to have individual calendar enabled where they can schedule events, either manually or automatically. Symbility can also assign claims and set appointments automatically based on the user's calendar and work schedule either via Claims Connect or the API. The user has the option of whether or not to accept appointments and can reschedule them to best suit their needs, as well as those of the policyholder. The Symbility calendar can be saved into the Outlook Calendar. As such, the user can view the appointment's details, even when they're working offline.

Companies have the option of creating special preferences for when surges in claims occur, such as CAT, in order to easily accommodate changes in the assignment process. Users can be activated for CAT, thus using the surge overrides as part of their profile. Companies can also set assignment quotas, in order to provide work distribution on a quota basis over a specified period.

2.2 Enhancement # 21517 – Multiple Assignment Types

Symbility has totally revisited the way it handles the claim statuses. We have reduced the number of claim statuses in the favor of an improved assignment statuses process. Symbility is now able to let Administrator's create a list of Assignment Types, specific to their company, which a user can select from when assigning a claim to an internal user or to an external company. The Administrator may also specify which assignment statuses are relevant to that type of assignment. By defining user and supplier workflows as assignment types, a detailed view of the present position and event dates can be achieved. By separating various aspects of a claim into distinct assignments, multiple vendors can easily collaborate on different aspects of the same claim and the progress of each separate aspect can be tracked and measured. Also, by separating various aspects of a claim into distinct assignments, multiple assignments can now be made to the same vendor and the progress of each separate assignment can also be tracked and measured. Please contact your Symbility Account manager for more details on this major feature.

2.3 Enhancement # 22532 – Integration with MagicPlan from Sensopia

Symbility is now integrated with Sensopia's popular MagicPlan application. MagicPlan's functionality will be embedded in the iOS version of Mobile Claims. This enables users to quickly capture room dimensions and shapes using the camera on their iOS device and will allow them to create floorplans more efficiently.

3. Other Enhancements

3.1 Enhancement # 2188 – Print Preview

Mobile Claims users now have the ability to get a preview before printing their claim. The Print Preview is available from the Print Options dialog box of Mobile Claims.

3.2 Enhancement # 16961 – Add Primary adjuster field to report builder

Report Builders users on Claims Connect now have access to the primary adjuster field for their reports.

3.3 Enhancement # 20180 – Ability to search Claims Connect with a Symbility ID

Users can now search sym.net using their Symbility ID. The search requires an exact match.

3.4 Enhancement # 20470 – Add option to increase input font size in forms

Users can now increase the size of the font on their display when inputting data into forms.

3.5 Enhancement # 21325 – Import Accurrence Depreciation information

Accurrence users can now import Accurrence Depreciation information. If the depreciation age is provided by the scope item document and if the item it is attached to has a life expectancy value provided, the depreciation type will be set to life expectancy and the depreciation will be enabled.

3.6 Enhancement # 21338 – API Unique Claim ID

Vendors such as Independent Adjuster firms and Third Party Administrators now have access to an API unique claim ID that they can refer to when pushing pulling claim data from their management system to Symbility. Contact Symbility to get the latest version of the API documentation.

3.7 Enhancement # 21348 – RCT-MMH & HV styles need to be added to dropdown

Users can now choose MMH (Mobile Home) and HV (High Value) styles from the dropdown menu when creating a valuation using the RCT integration.

3.8 Enhancement # 21431 – Option to make Loss Type mandatory to create claim

Users now have the option of making the Loss Type field mandatory whenever a user creates a claim. This feature can be toggled off or on by Symbility users only.

3.9 Enhancement # 21563 – Create a new option that allows Insurers to enable/disable the IAs to modify the policy information

Insurance Companies can now choose to allow Independent Adjusters to modify the policy information, including the coverage type and deductible.

3.10 Enhancement # 22515 – Tasks Enhancements - Automatically Add Task Owner as Participant

Task owners are now automatically added as participants in a claim. In this way, a Task Owner will be able to modify the claim once the task is assigned to them, if required.

3.11 Enhancement # 22520 – Tasks Enhancements - Branch Permissions

The Task Manager has been updated to increase the Head Office's control over assignments from branches. Head Office can enable/disable the ability for their branches and franchisees to manually assign a task to a user from the head office, or use the group templates or triggers.

4. Major Resolutions

4.1 Resolution # 20927 – Audit Report should be added as soon as estimate is added to claim

Symbility has resolved an issue that forced users to close and re-open a claim in order to see the Audit Report node when the Claim Structure did not have a default Estimate defined.

4.2 Resolution # 21220 – Client Issue - Cannot Disable Keyboard for Touch Screen - feature request

Symbility has resolved an issue that prevented users from disabling their touch screen keyboards on their mobile devices, even if they were using a hardware keyboard instead. A new option was added to the General section of the Preferences in Mobile Claims that allows the user to disable the onscreen keyboard.

4.3 Resolution # 21528 – Client Issue - Intermediary cannot modify estimate created by an Assignee on claims created by an insurance company

Symbility has resolved an issue that prevented the intermediary to modify an estimate created by one of their assignees.