SYMBILITY
PROPERTY

RELEASE NOTES

1) INTRODUCTION

This document describes the new features and enhancements that are part of the upcoming version 6.2 of Symbility Claims Connect and Mobile Claims. The target dates for this international release are:

- September 13th in Canada
- September 20th in Belgium & Germany
- September 28th in the United States
- October 4th in the United Kingdom
- October 11th in South Africa, Australia and New Zealand

As you read through the enhancements the number in brackets at the end of the enhancement represents the sprint version this feature was included within.

2) MAJOR ENHANCEMENTS

HOVER Integration

Symbility continues its commitment to integrating with other Insuretech companies with the first phase of the integration of the HOVER system.   HOVER is a technology that transforms smartphone photos of any home to a fully measured roof and exterior 3D model.   Although Symbility users were already able to manually import HOVER measurements and diagrams (XML), this integration now streamlines that process.

Companies wishing to utilize the HOVER integration can set up their HOVER account within Symbility Claims Connect and then utilize the claim number as the unique identifier for a job. This will allow for the automatic synching of a HOVER job to its corresponding claim in Claims Connect. Additionally, if a specific job did not automatically synch to the claim in Claims Connect, a user can also go into their list of HOVER jobs from Claims Connect or Mobile Claims and select specific Job they wish to pull into a claim.

In addition to pulling in the both the Roofplan and Exterior plan diagrams and the HOVER measurements, this first phase of the integration will also import all the photos taken with the HOVER app and place them in a Photos folder within the claim on Claims Connect.

LINK - Rest API & Documentation

Many insurance carriers have invested, and continue to invest in, policyholder applications for changing policy details, submitting claims, etc. Because of these initiatives, many carriers desire to present all of this functionality to the insured in their own single application. This enhancement now packages for third party consumption, the API's created to enable LINK as a Symbility service offering. This allows the functionality of LINK to be presented in the insurance company's own consumer interface.

3) ENHANCEMENTS

LINK - Ability for Insurer to Access LINK

There are times when a Policyholder will contact the insurance company and want to get help using LINK. This enhancement allows an insurance company user to go into the Participants list for a claim, select the Policyholder's name and then view the claim as if they were in the LINK.

LINK - Ignore Document Size on Policyholder Smartphone

This enhancement for LINK pertains directly to the uploading of documents by the Policyholder from their smartphone. This change now allows any document uploaded from a smartphone using LINK to ignore the document size limit setting.

Changes to Fulfillment Page and 'Repair/Route Option Rule Conditions'

This enhancement first addresses a limitation that was currently in the 'Repair/Route Options Rule Condition' specific to the Estimate Total. A company who has rules for specific claims handlers that factored in the 'estimate totals' value can now select other financial measures within the claim to use as a rule to determine what level of user can handle a specific claim. The following additional 'Repair/Route Options Rules' have been added to give companies more flexibility in defining those controls:

- 'net estimate'
- 'amount payable if depreciation is recovered'

- 'subtotal (RCV before O&P and tax)'

Additionally, the 'Settlement Repair/Route' page was modified to help the user to see the estimate financial information that is more pertinent to them when making a more informed settlement and routing selection.

LINK - Notification When Supplier Added to the Claim

When using LINK, the policyholder has the ability to select various notifications based upon key claim events such as when an inspection is scheduled or when an estimate is completed. This enhancement now gives the policyholder the additional option to set notifications for when a specific supplier/contractor is added to the claim.

Prevent Editing of Closed Claims

In Claims Connect, there is a setting that can be turned on and off for a company that is labelled *'Prevent users from editing closed claims and completed assignments'* that limited the ability for users to edit closed claims and completed assignments. However, there were still some elements of a closed claim or a completed assignment that could be edited by various participants on the claim. This enhancement now expands the scope of this setting and prevents users from editing any element of a claim once it is closed. There remain a few specific exceptions to this setting that need to be excluded for practical functionality reasons including establishing a Video Connect call and a policyholder providing feedback for their claim using LINK.

LINK - Allow Policyholder to Unblock their Accounts Themselves

This enhancement gives a LINK user the ability to reset their password if they have forgotten it and additionally allows them to 'unblock' their own account in the event it becomes blocked due to entering in the wrong password too many times in a row. The policyholder can now select the option 'Forgot Password' before their account becomes blocked and will receive an email to reset the password on demand or, if their account becomes blocked, can use a similar path to unblock it. They will also be warned that entering in too many password attempts will block their account.

Ability to Manually Update Entered Assigned Dates via API

This enhancement is related to the API and addresses the capability to have manual dates for any assignment updated in Symbility. This change now allows external solutions to update the dates for an Assignment via the API including the following:

- Inspection Scheduled For
- Job Scheduled From
- Job Scheduled To

API - Estimate Default Coverage Included in the API

This enhancement of the API will allow external systems to pull the default coverage information for a specific estimate in Claims Connect.

Update API Notification – Web Service Key(s) via API

This enhancement is specific to giving insurance company customers the ability to update the Web Service Key(s) and the API account password via API calls versus having to do these functions manually. This helps security risk teams inside of insurance companies save time in keeping their claim data safe.

GDPR - Record Policyholder's Consent to Share Personal Data with 3rd Parties

As a part of the new GDPR requirements, all policyholder's must agree to the insurance company's End User License Agreement (EULA), Privacy Policy and Consent Form. Additionally, when they have given their consent and agreement that information must be stored in accordance with the GDRP requirements. This enhancement fulfills that requirement.

Data Export Requirements

This enhancement addresses the request to add two additional fields from the Symbility claim data as part of the data export specification. These fields are as follows:

- Editable user Assignment Dates
- Journal Table Changes

Option for User to be Added to the Symbility Mailing List

As part of the GDPR requirements, users must give explicit consent in order for a company to send them email communications. When a user first logs into Claims Connect they are now asked if they want to be added to Symbility's mailing list or if they wish to decline. This message will appear one time at the user's first login after the upgrade.

4) NEW CLAIMS CONNECT USER INTERFACE ENHANCEMENTS

Claims List Enhancements

i. Recently Viewed Claims

This feature inside of the Claims Filter blade allows you to show a list of recently accessed claims or those recently synchronized with Mobile Claims.

ii. Ability to Add Participants to Multiple Claims from the Claim List

From the Claims List a user can now multi-select claims and assign them to a specific participant.

iii. Ability to Assign Multiple Claims

Similar to adding a participant to multiple claims, a user can now multi-select claims and then assign those claims to a specific user or company.

iv. **Ability to Stop Participating from Multiple Claims at One Time**

A user can now stop participating from multiple claims at one time from the Claims List.

v. **Ability to Guest Users to Filter the Claim List**

This enhancement to the Claim List allows guest users to also filter the Claim List on those claims they are participating in.

vi. **Custom fields can now be selected as columns**

This enhancement to the Claim List allows users to select custom fields as default columns when viewing their Claims List.

vii. **New Command to view claim**

A command to open a claim in a new tab has been added to the "..." menu on the Claim List and Assignment List

viii. **New Search behavior**

When using the Quick Search, if only 1 claims is found, it will be opened automatically

ix. **Ability to select columns and group claims on a smartphone**

The commands to group claims and select columns for the Claims List are now available to users on their smart phones.

x. **Flagging Claims**

Users can now flag claim that are important to them. Claims are only flagged for that user and a default filter has been added to quickly find all flagged claims.

xi. **Exporting Claims List to Excel**

For users who have access to the Reporting tools on Claims Connect, a download list button has been added to the bottom of the Claim List. Clicking on this will generate a report in the Report Queue showing the same columns and data currently visible in the list letting users export their list in HTML, PDF or Excel format.

Assignment List Enhancements

i. Select Columns to be Displayed on the Assignment List

The Assignment List provides a list of claims and the assignment information for each claim. The user can now not only select the columns they want to appear on the list but also select the order in which they want them to appear.

ii. Ability to Group Assignment List

A user can also chose to group the Assignment List by selecting such data as Assignee, Assignment Type, Assignment Status, Assignor, Loss City, Loss State and originator.

iii. Enhanced Functions from Assignment List

There have also been enhanced functions added to the Assignment List to help users as they work with Assignments. They are as follows:

- Change the status of an assignment directly from the Assignment List
- View the claim's timeline
- View the other assignments of a claim
- View tasks for the claim
- View the claims location on a map

iv. Ability to select columns and group claims on a smart phone

The commands to group claims and select columns for the Assignment List are now available to users on their smart phones.

v. Improvements for refreshing the Assignment List

Users can now refresh the Assignment List by simply clicking on the 'Assignment List' links at the top of the screen.

vi. Exporting Assignment List to Excel

For users who have access to the Reporting tools on Claims Connect, a download list button has been added to the bottom of the Assignment List. Clicking on this will generate a report in the Report Queue showing the same columns and data currently visible in the list letting users export their list in HTML, PDF or Excel format.

User Preferences Enhancements

i.   User Defined Default Page when Opening a Claim

A user now has the option to change the page that appears when they open a claim. The Timeline is the default page however a user can now default other pages such as the Assignments or Loss Summary.

ii.   User can Define Map Appearance

A claim or claims can be viewed using Google Maps from various places within Claims Connect. A user can now chose to have the map view as their default and can select if they wish to show the map or street view or both in these locations.

Documentation Enhancements

i.   User can Switch Between Card View and List View

Within the Documentation page a user can chose to have the claim documentation displayed either by the use of cards or in a more traditional list view.

ii.   Grouping Documentation by Company – Policyholder Section Available

The user can also group the various documentation categories (Estimates, diagrams, photos, etc.) on the Documentation tab by company or by category. Additionally, a new category titled 'Policyholder' is now available for those companies utilizing the LINK feature. In this category such things as pictures, documents, etc. that are uploaded by the policyholder can be found.

Other UI Enhancements

i.   Timeline Filtering Options Preserved

If a user has filtered the Timeline those filter settings will be preserved when they navigate from one claim to another.

ii.   Simplified Guest User View

A simplified view of Claims Connect has been enabled for all Guest User accounts.

iii.   Claim Header View for Assigned Companies

The Claim Header for companies assigned to a claim now show the current assignment status and the age of the assignment.

iv.   Print Command Accessibility

The Print command has been moved to be more easily accessible on the Timeline, Loss Summary, Documentation, Forms, and Estimates pages.

v.   Better Visibility on Ownership

It is now easier to see who has ownership of the claim on Claims Connect. A "View Claim Owners" button has been added to the 'Participants" blade in a claim. This allows you to quickly see all owners of the claim, their user details and also let you revoke ownership if needed. This information is also available through the "View Claim Owner" command in the Assignments section of the Commands panel.

vi.   Company Registration

The pages for creating a new company or branch have been updated with a new look.

vii.   Photos

It is now possible to add photos on the fly when reviewing photos in full screen mode.

viii.   Remember Last 'Quick Searches'

The quick search control at the top of the screen will now show a list of recent searches when the field is selected, allowing the user to easily redo a previous quick search.

ix.   Chat Support Button Relocation

The Chat Support button has been relocated and now appears as a smaller icon at the top right side of the screen beside the 'Notifications' icon. It continues to function as it did, allowing a user to contact the Symbility Support Team with questions or comments.

5)   RESOLUTIONS

LINK - Fix URL Length in SMS Sent to Policyholder

Text message notifications sent to LINK users often will break into multiple messages (called 'concatenate') if there are too many characters. This resolution now eliminates the breaking up of messages and makes notifications more readable and therefore understandable to the Policyholder.

ContentsExpress Integration with Mobile Claims – Windows 10

The Enservio ContentsExpress integration with Symbility helps adjusters generate accurate personal property estimates. This enhancement addresses some compatibility issues and now allows Mobile Claims users running Windows 10 to use the ContentsExpress integration trouble-free.

Fix Claims Connect Session Management

We made this fix to improve the session management inside of Claims Connect specifically related to the Session Identifier and Session Termination. Specifically, it fixes the issues of the session identifier not property terminated after logout in Claims Connect and invalid session termination within LINK.

Subcoverages- Amount Payable

This resolution completes the needed calculations of the Amount Payable in order to make it compatible with the Payment Tracker feature.