



ORIGAMI RISK

October Product Release Summary

2022

Note:

This presentation does not cover our entire release for October 2022. It contains highlights of new features and enhancements for various markets.

[To view the release notes in full, please click here.](#)

[To view all product release videos, please click here.](#)

[To view updates for RMIS, EHS or GRC, please click here.](#)

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Claims Administration

Parse Payload Update and Import Policy Data

- As part of the claims intake and submission process, this update of backend functionality will allow clients to import greater amount of 3rd party policy data into Origami
 - Clients can now search 3rd party policies in Origami and have all policy data (coverages, limits, insureds, etc.) in a single view
- The policy payloads can now be mapped to the new domain(s), table(s) and field(s) in Origami
 - This feature update allows claims users to view and utilize all policy information in Origami and allows this same data to be used in other parts of the claim (Coverage Limits, Deductibles, Exposure Types, etc.)
- Claims can be started from the Policy screen and involved parties can be added with fewer fields, which expedites your claim initiation process

Note: This feature is currently available for Workers' Compensation, Auto, BOP property, umbrella, and commercial property. Additional product types to be added in the future.

New Feature: Policy Snapshot

- After you have completed the intake of a claim and the Loss Event is saved, you can now view the version of the policy on the same claim - also known as a **Snapshot**.
- Now, if you search for a policy and select it, you can see all policy details after the Loss Event and Claim creation at any time during the Claim lifecycle (in read-only format)
- Additionally, users can alter the Claims form in Admin > Custom Forms to display any policy detail element from the Snapshot using the “relatedField” element

[WATCH DEMO](#)

New Feature: Policy Snapshot

Claims >		John Smith (8-1) ☆		Edit Claim	Close Claim	More ▾
Claim Number	8-1	Location	LOCA1 - Diversified Industries Inc			
Claimant	John Smith	Snapshot Policy	WC10852118			
Coverage	Workers Compensation	Snapshot Effective	03/15/2021			
Status	Open	Accident State	Arkansas			
Loss Date	03/10/2022					
Loss Day Of Week	Thursday					
Report Date	03/12/2022					

Note: These fields will only be displayed in the Claim was created from a Loss Event that came from a Policy Snapshot

New: Claims Intake “Interview Style” Module

- Before, Interview Style was available for Incidents. Now, you can use Interview Style for Loss Events.
- Users can now capture first notice of loss (FNOL) Loss Events details using a new Interview Style module
- With this enhancement to the Interview Style module, users can:
 - Intake a Loss Event/claim using policy data such as Coverages, Coverage Limits, Deductibles and Persons
 - Intake a Loss Event and add one or more claim(s) as children of the Loss Event



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Policy Administration & Billing

Billing Enhancements

Auto Write-Off Filters

- A new UI has been created which allows the users to create auto write-off rules.
- The user can set up multiple write-off rules to define threshold amount and filter on policies, coverages and members.
- The auto write-off will run as a nightly process and write-off the policy amount on all the policies which are filtered by the write-off rules.

Payment at Broker Office Level:

- You can now disburse agency commission at the Broker Office Level in Origami
- When an agent is linked to a broker office and an agency wants the broker office to collect the commission, this new feature will allow you to set up the disbursement level as broker office.

Prorated Equity Billing

- Our Equity Billing functionality has been enhanced to offer proration on a daily basis.
- You can now select between a monthly or a daily pro-rate.

Agency Billing Enhancements

Net of Commission Agency Statements

- Our agency billing workflow has been updated to generate agency statements as net of commission
- In Origami, the commission amount is auto-deducted from the agency statement. The agency payment amount will always be the net paid amount
- Due to this change, the commission retained field has been removed

Commission Basis Updates

- Commission Basis has been consolidated to Written Premium and Invoiced Premium Basis to align with industry standards
- Collected premium and earned premium options have been removed

Enhancements for MGA/MGUs

On policies, a new domain has been added to support MGA/MGUs

- If more than one MGA is required to manage policies in Origami, this new feature will allow them to log in to Origami and manage the policies where they are listed as an MGA



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Platform Enhancements

New Module: Employee Health

What's Included:

- Employee health records
- Vaccination tracking including (but not limited to): COVID, Flu, Hepatitis B
- Waiver tracking
- Testing tracking including: drug and alcohol screens, TB testing, respirator fit testing; includes follow up to positive tests

How It Benefits You:

- Single source of truth for employee health records
- Stay on top of preventive measures to ensure worker health
- Automate logistics around testing and exposure management related to pre-hire, post-exposure, or even post-accident monitoring

[WATCH DEMO](#)

New Module: Employee Health

Vaccination Records >

Vaccination Record for Terry Richard Adams

Vaccination Type	COVID-19
Employee	Adams, Terry Richard
Vaccination	One Time
Frequency	
Completed	Yes
Appointment Date	07/01/2022
Comments	Booster

Testings and Screenings >

Testing and Screening

Employee	Adams, Terry Richard
Type	Physical Exam
Frequency	Annually
Completed	Yes
Appointment Date	12/02/2021
Result	In good health

Testing and Tracking Features

New Module: Employee Health

Centralized Employee Record

Employees > **Adams, Terry** Edit Employee More

Hire Date 01/26/1998

Certifications and Trainings All Certifications

Training or Certification	Certification Date	Valid Through Date	Comments
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Employee Profiles Manage Associated Employee Profiles

Name	Description
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Recent Claims All Claims

Claim Number	Client	Claimant	Coverage	Location	Status	Report Date	Loss Date	Total Incurred	Description	Adjuster User
COMP-87	Dynamic Industries, Inc.	Adams, Terry Richard	Workers Compensation	LOCB2C3 - Charlotte	Open	07/02/2021	07/01/2021	500.00		
COMP-29	Dynamic Industries, Inc.	Barr, Adam	Workers Compensation	LOCB1C4 - Baltimore	Open	01/31/2021	01/31/2021	4,570.00		

Affiliated Locations New Affiliated Location

Location	Affiliate Name	Start Date	End Date	Is Active
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Testings and Screenings (First 20) View All Testings and Screenings

Employee	Type	Frequency	Reason	Testing Location	Result	Result Date	Test Date
Adams, Terry Richard	Physical Exam	Annually			In good health		

Recent Vaccination Records All Vaccination Record

Employee	Vaccination Type	Vaccination Frequency	Completed	Appointment Date
Adams, Terry Richard	COVID-19	One Time	Yes	07/01/2022
Adams, Terry Richard	Influenza	Annually	Yes	12/02/2021

New Module: Employee Health

Assign Record Access Levels

Administration > Health Record Access Groups >
New Health Record Access Group Save Changes or Cancel

Health Record Type Access Group Details

Display Name *

Description

Health Record Type	Full Access	Read Only	No Access
Alcohol Testing	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Drug Testing	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Hearing Assessment	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Physical Exam	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Radiology	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Administration > Vaccination Records Access Groups >
New Vaccination Record Access Group

Vaccination Record Access Group Details

Display Name *

Description

Vaccination Type	Full Access	Read Only	No Access
COVID-19	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Hepatitis B	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Influenza	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

New Module: Inventory Management Solution

Previously, some of our clients had custom configurations to track the inventory of various items. With our new standard solution for Inventory Management, **all Origami clients can track the inventory of Chemicals, Assets or Vehicles across different locations with transactional history through a standard solution.**

With this new module, New Domains have been added to Origami:

- Inventory
- Inventory Items
- Inventory Transactions
- Measurement Units and Measurement Unit Type Code Tables

New Module: Inventory Management Solution

Locations
Edit Inventory
More ▾

Inventory Information

Inventory Number

Inventory Name

Entry User

Location Information

Location

Building Facility

Confidential Storage Location

Sub-Inventories + New Inventory All Inventories

Inventory Number	Inventory Name	Location	Parent Inventory ID

Inventory Items + New Inventory Item All Inventory Items

Inventory Item Name	Inventory Item Number	Inventory	Parent Domain	Parent Quantity	Actions	Measurement Unit	Inventory Container Type

Open Tasks New All Tasks

All Notes New All Notes

Recent Emails New All Emails

Contacts

Files New All Files

Inventory Screen

New Module: Inventory Management Solution

New Inventory Item

or

Inventory Item Number *	<input type="text"/>	Empty to autogenerate	Inventory Item Name	<input type="text"/>
Inventory *	<input type="text"/>		Quantity	<input type="text"/>
Parent Domain	Asset		Inventory Container Type	<input type="text"/>
Asset	<input type="text"/>	<input type="button" value="Q"/>		

New Asset Inventory Screen

New Dashboard Widget: Scrolling Text

What's New

- Specify text that scrolls along the bottom of the dashboard

How It Benefits You:

- For clients utilizing the Public Dashboard feature in a break room or common workstation, this allows you to display key announcements or other important information in the form of a “ticker” to get the attention of the employees viewing the dashboard

[WATCH DEMO](#)

New Dashboard Widget: Scrolling Images

What's New

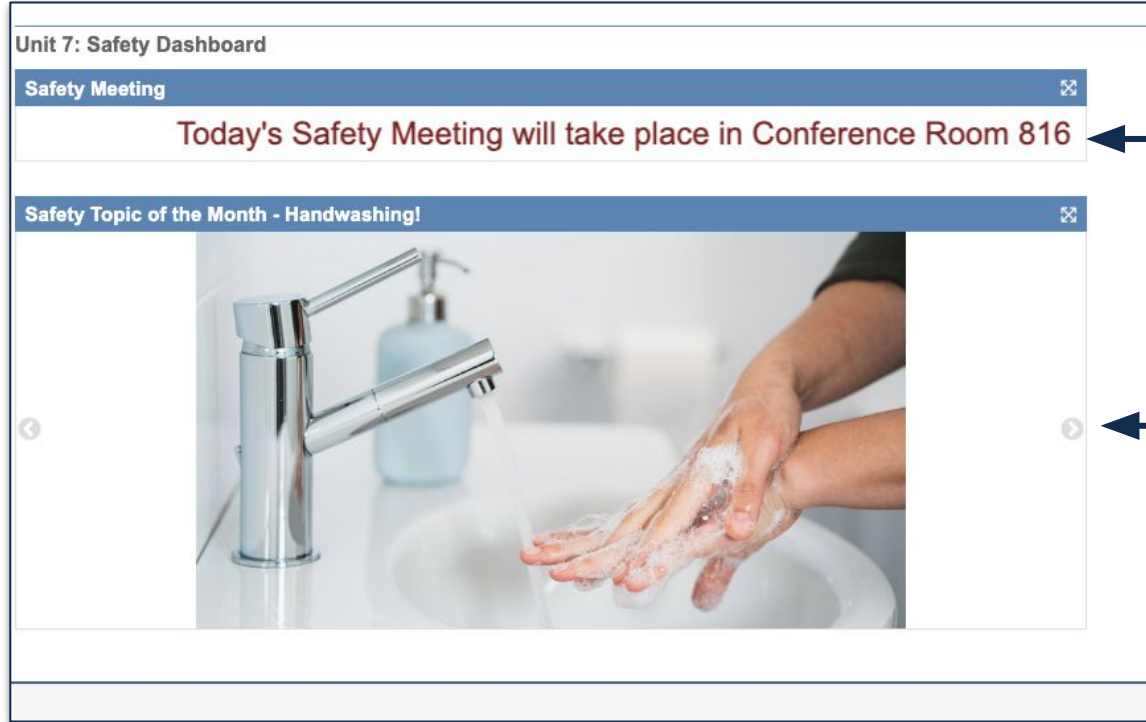
- Ability to display a series of uploaded images that will rotate

How It Benefits You:

- For clients utilizing the Public Dashboard feature in a break room or common workstation, this allows you to display key slides or images to employees that are viewing the dashboard

[WATCH DEMO](#)

Public Dashboard Example



Scrolling text with important announcement

Rotating Slides

Updated Feature: Mini-Help Guides

In Origami, we have several detailed mini-help guides in various parts of the system.

One example is **Help with customizing the fields and layouts of forms**, including understanding the structure of Form XML, over 35 form elements, and attributes for each element.

To access this Help Guide, log in to Origami and enter **/Forms/Help** after the URL.

Or, navigate to **Admin > Custom Forms > select your Form Set > More > Help**

[View the full release notes for more Mini-Help Guides.](#)

Overview	<auditDefinition> Element
<u><form> Element</u>	<select> Element
<collapseMarker> Element	<address> Element
<gridPanel> Element	<custom> Element
<mailMergePanel> Element	<value> Element
<scriptPanel> Element	<html> Element
<widgetPanel> Element	<image> Element
<inlineFormPanels> Element	<space> Element
<incidentTypeQuestionsPanel> Element	<report> Element
<incidentTypeQuestion> Element	<sketch> Element
<domainComparisonPanel> Element	<diagram> Element
<panel> Element	<qrCode> Element
<column> Element	<reserveWorksheetGridPanel> Element
<section> Element	<bucketRow> Element
<field> Element	<panel> Element
<relatedField> Element	<categoryRow> Element
<lookup> Element	<rcaFishbonePanel> Element
<mapLookup> Element	<scheduleRatingPanel> Element
<benefitRateLookup> Element	<gridPanelCondition> Element
	<kpiPanel> Element

Additional New Features

Export Data to a CSV File

- Previously, you could only export data as an Excel spreadsheet and if you needed a CSV, you had to convert it manually.
- Now, you can export data directly as a CSV from the More menu and exists in Origami wherever you can currently export to Excel.

Generate QR Codes

- You can now generate QR codes within Origami or add QR codes directly to a form via XML
- For detailed instructions, view the **Mini-Help Guide list** from the release note for “Help on Forms XML”

Mail Merge: Standard Tags Return Images

What's New

- Users can now display images associated with domain records such as audit responses
- You can use a tag to display only the most recent image or file, or a tag to return all images and files

How It Benefits You:

- Now, images associated with audit responses, audit questions, or corrective actions can be produced on mail merge documents.
- If you want to produce mail merge letters or reports from records that contain images, you are no longer restricted to only using the abstract or engaging Origami for a custom template

PrimaryImage()

This method allows you to pull the most recently modified image associated with the record. It takes no parameters.

For example, on an Audit Response, to pull the **most recent** image on the Audit Response if it exists you would use this tag:

```
IMAGE:AuditResponse.PrimaryImage()
```

[WATCH DEMO](#)

Additional Reporting Features

Name FTP Reports in Report Scheduling

- When using the 'Send to FTP' method in report schedules, you can now define the file name
- This is helpful if you send regular files to FTP, as it offers you an easier way to keep track of files

Advanced Search

- Advanced Search is now supported in Audit Response Details as well as the Values Collection administration pages.
 - This means you can use search screen configuration tools as well as create saved views.



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If you have any questions about these features or would like to activate them in your Origami environment, please reach out to your Origami Account Manager.