ORIGAMI RISK

April 2022
Client Release Notes

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Claims/Incidents

Claims

Locations Lookup on Claim Forms

Currently, it is not possible to attach a location to a claim if the Location Inactive Date is populated regardless of what date the location was inactive. Origami will now allow this functionality.

If a Loss Date is set and the Location Lookup is clicked on a new or edited claim, then the current Loss Date will be passed (whatever is set on the screen, not what is saved in the database – i.e., change Loss Date but don't save, applies Location Lookup with Loss Date populated on the web page on Location Lookup click). The default locations displayed when opening a Location lookup on a new/edited claim will be 'Active for Claim' – meaning Locations with (Active Date <= Loss Date AND an (Inactive Date >= Loss Date || No Inactive Date)). If there is no Loss when the Location Lookup is selected, all locations will be provided by default.

CMS

Additional CMS Query Response Fields Added to CMS Reports

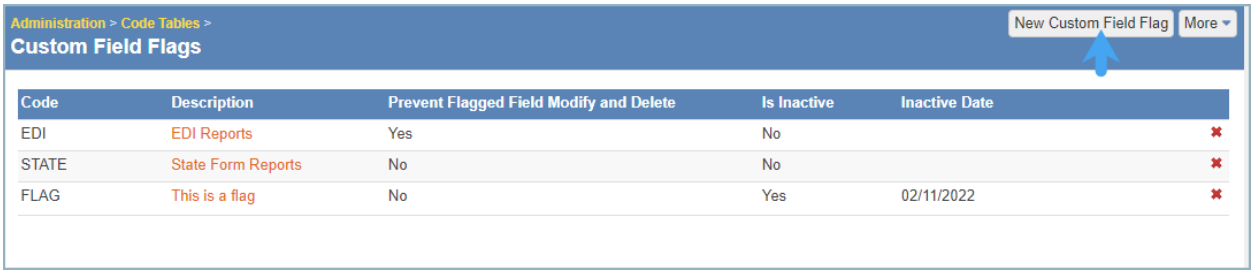
Origami has added the Part C and Part D fields from the Query Response File to the CMS Report.

EDI

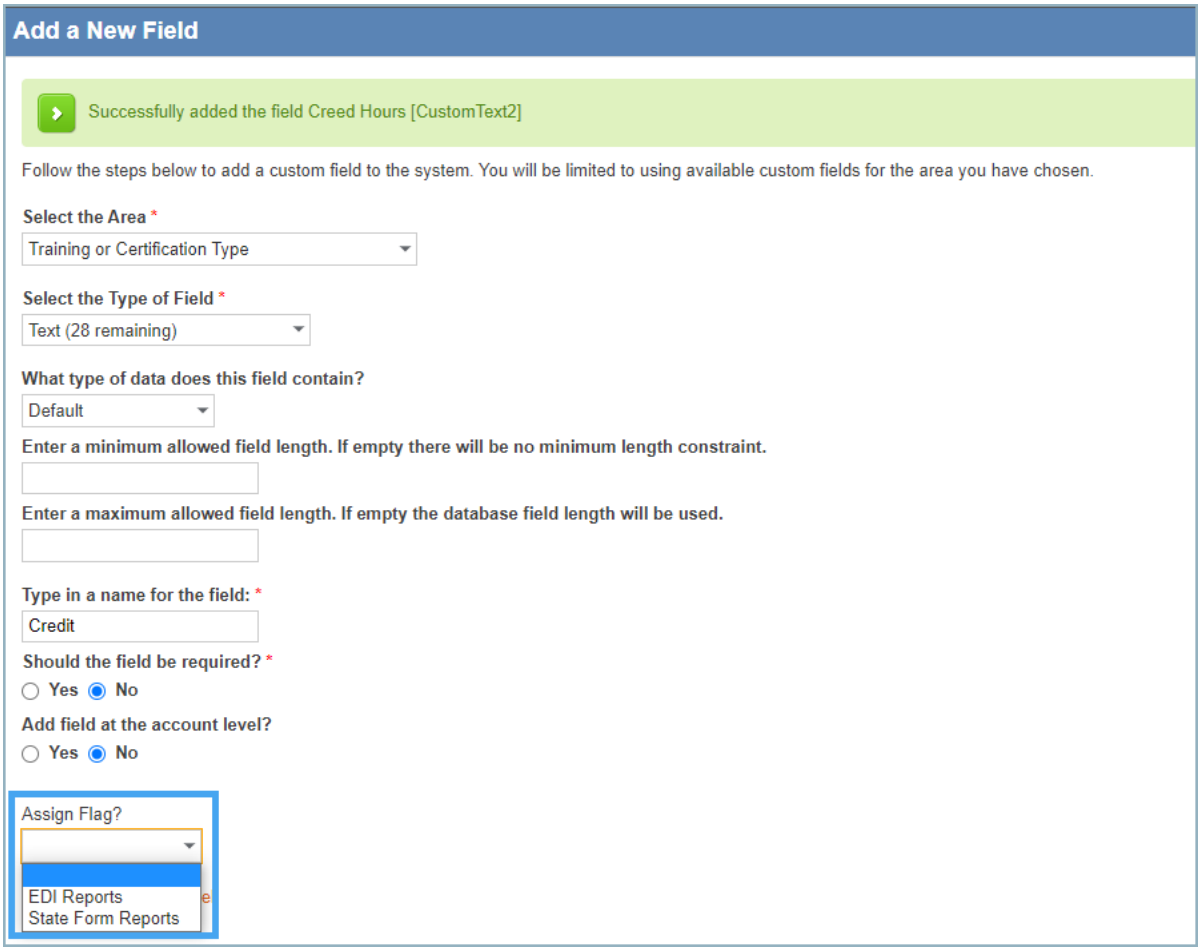
Ability to Identify Fields Used for EDI/State Forms

In this release, Origami has added a Custom Field Flag Code index table to create custom flags or fields.

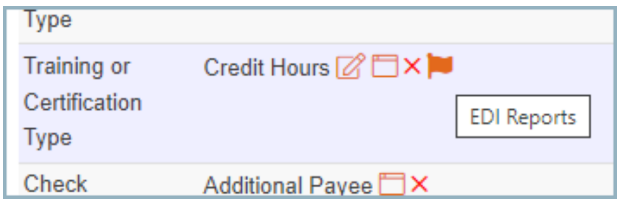
On the following screen, you can create custom flags to assign to fields.



When adding a new field, you have the option to select a flag to assign.



The flag will display on the Fields index page for flagged fields and the custom field flag code's description on hover.



The **Delete** button is hidden and prevented if the flag has Prevent Edit Delete is set to "true."

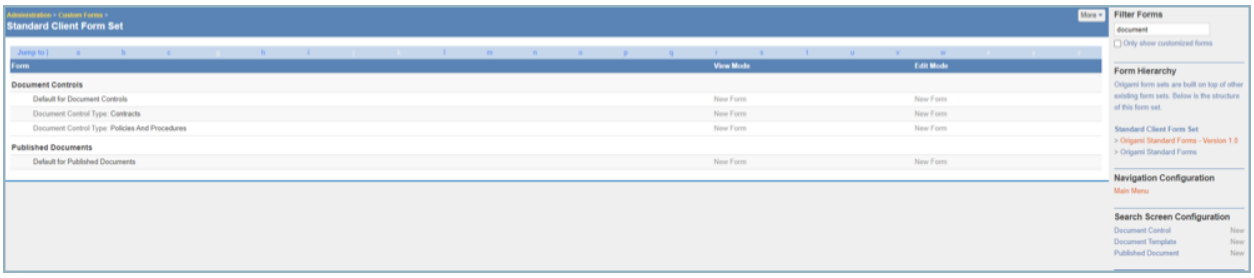
General/Admin

Contract Management

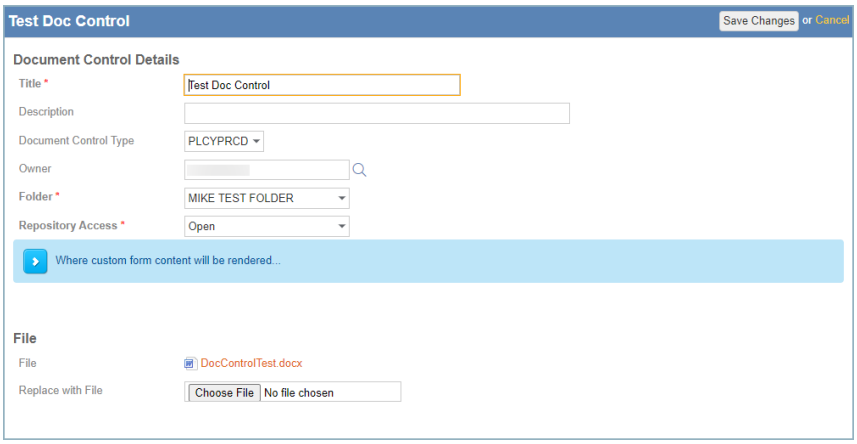
Support for Form Groups Added for Document Controls Domain

Origami has added support for form groups to the Document Controls domain. The form group is keyed off the Document Control Type ID which is the ID of a record in the new Document Control Types table. This field is optional on a document control record.

Document Control Types Table



The following screenshot is an example where a custom edit form exists and where content will be rendered:



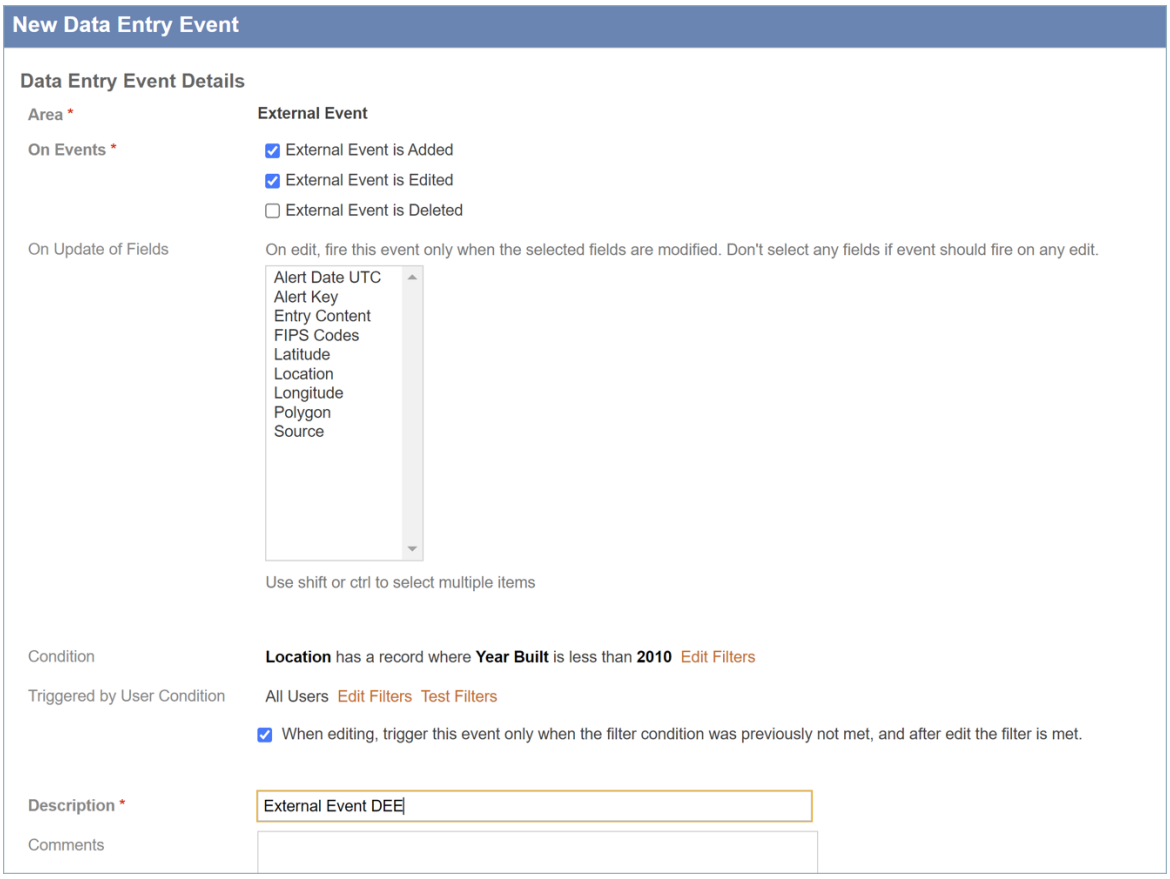
In addition, an intermediary document control type picker screen has been added that will display before creating a new document control if active records exist in the Document Control Types table.

Data Entry Events

Data Entry Event Enhancement

Users will now have the ability to store information from Severe Weather Alerts and Additional Alert Feeds into a new domain table and to enable data entry events off of this domain.

External Events Data Entry Event



External Events Index Page

External Events

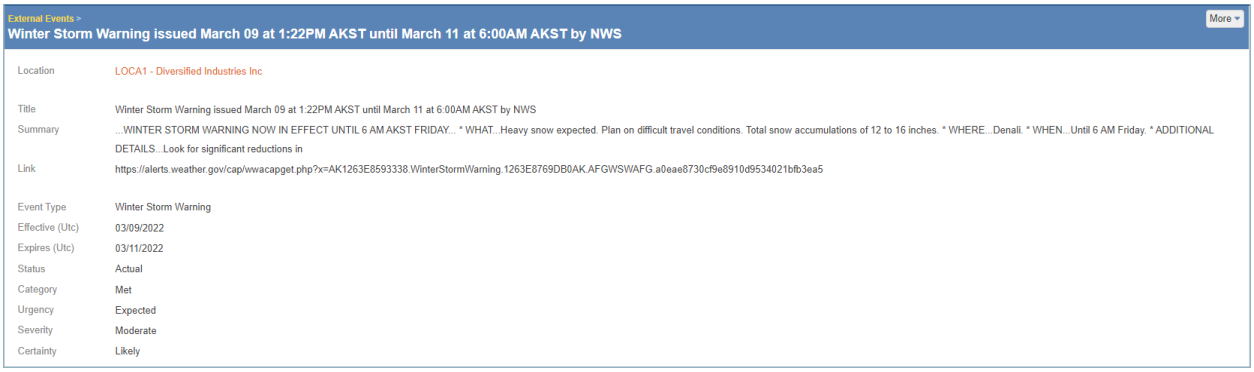
Location	Title	Summary	Alert Date UTC
LOCA1 - Diversified Industries Inc	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022
LOCB1C1 - New York	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022
LOCB1C2 - Philadelphia	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022
LOCB1C3 - Boston	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022
LOCB1C4 - Baltimore	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022
LOCB2C2 - Jacksonville	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022
LOCB2C3 - Charlotte	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022
LOCB2C4 - Miami	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022

Page 1 Next Results per page

NOTE: The new Service Queue Instance will be needed in order for this functionality to work.

QueueName
origami_externaleventmessages

External Event View



External Events >
Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS
More

Location	LOCA1 - Diversified Industries Inc
Title	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS
Summary	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in
Link	https://alerts.weather.gov/cap/wwacapget.php?x=AK1263E8593338.WinterStormWarning.1263E8769DB0AK.AFGWSWAFG.a0eae8730cf9e8910d9534021bfb3ea5
Event Type	Winter Storm Warning
Effective (Utc)	03/09/2022
Expires (Utc)	03/11/2022
Status	Actual
Category	Met
Urgency	Expected
Severity	Moderate
Certainty	Likely

File Attachments

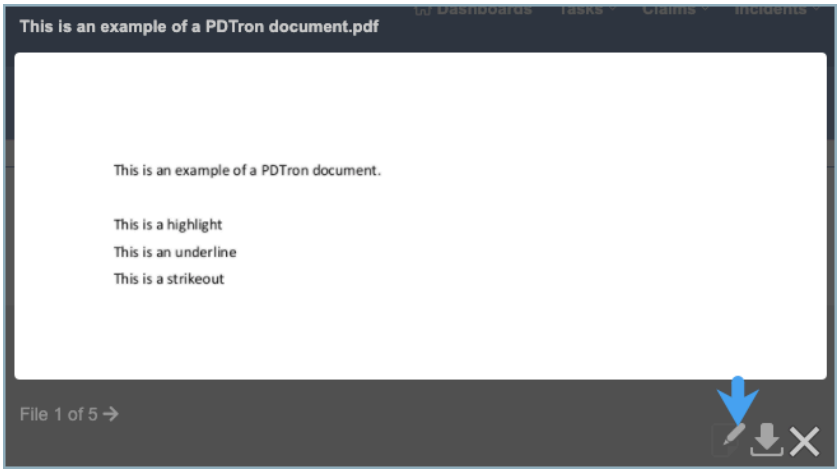
Ability to Annotate on Files

In this release, Origami has added the ability for users to add annotations and redactions to PDF files.

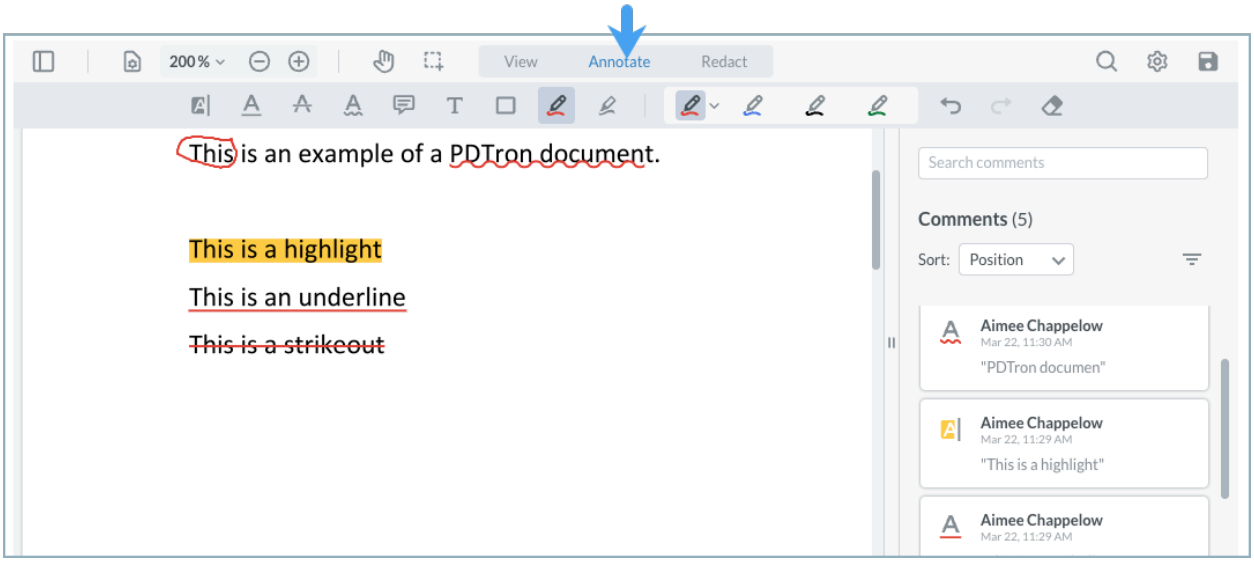
NOTE: This functionality must be enabled by your Service Representative and the user must have the following permissions.

Annotations

Using the annotation feature, you can highlight, underline, strikeout, free draw, or add free text. To use this functionality, open the file in edit mode.



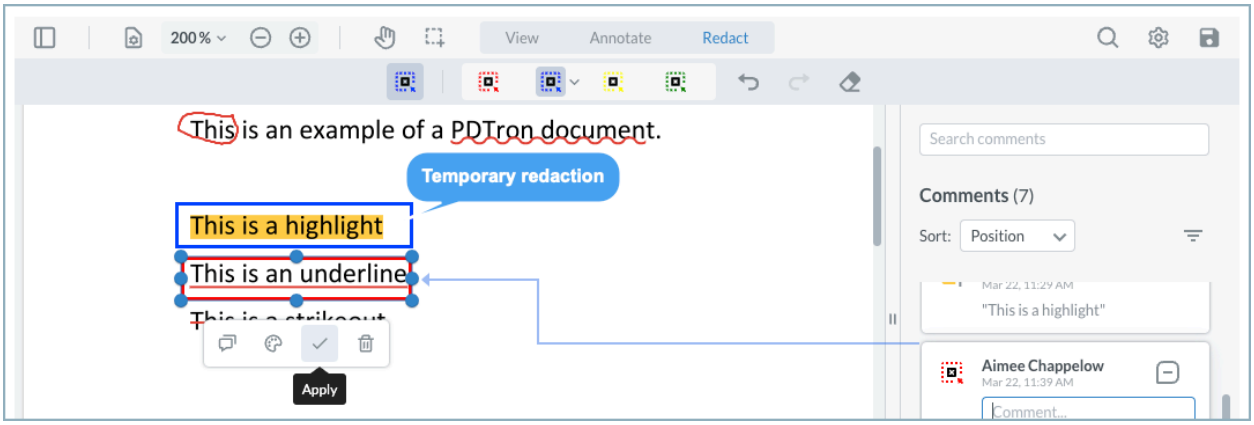
Click **Annotate**.

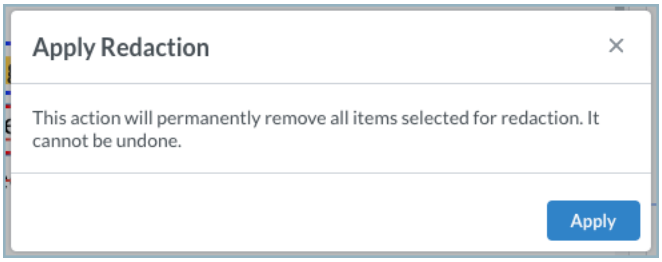


Redactions

Redactions function a bit differently in that there are two phases of applying redactions: temporary and permanent. When you create a redaction, it is a temporary redaction, which means you can delete it even after saving the document. Temporary redactions have a border around them.

To make a redaction permanent, click the border of the redaction and select “Apply.” Once the redaction is applied, it is permanent and cannot be deleted.





View Annotations

Only users with “View Annotations” permission can view annotations; however, they cannot modify the annotations.

If the user does not have “Create/Modify/Delete Annotations” and “View Annotations,” they will be unable to view any annotations on a pdf document. Even if the document is downloaded, the annotations will not display unless the user has the correct permissions.

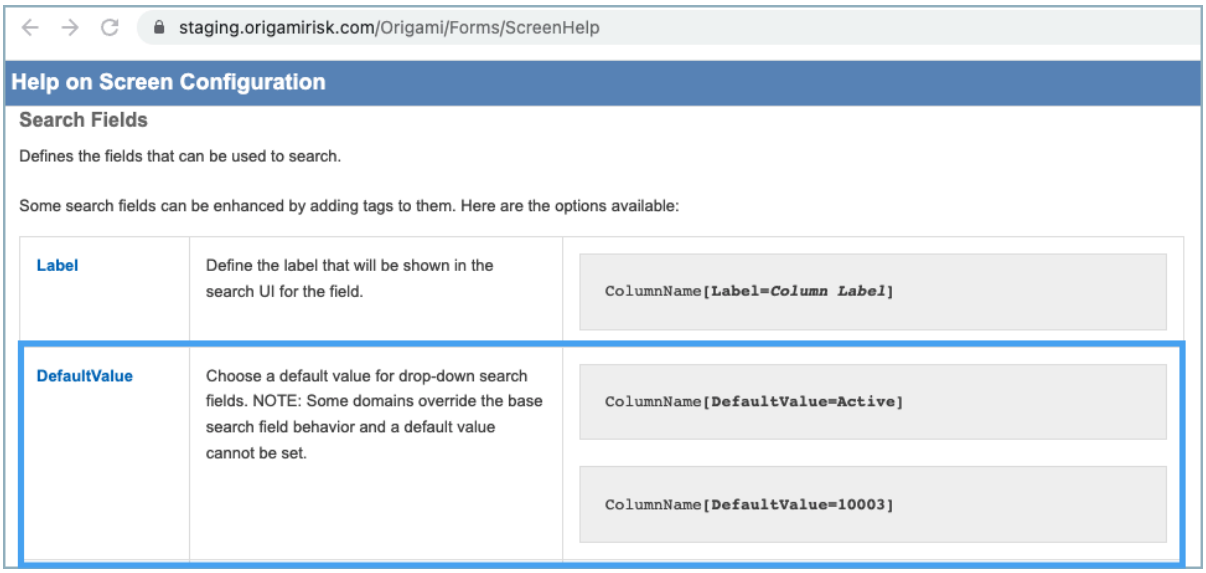
Forms

Search Screen Configuration - Ability to Define Default Value on Filter By Dropdown Fields

Currently, there is no way to set a default value for a dropdown field (e.g., Policy - Status) on the Filter By. In this release, a new tag with syntax column name [Default Value = XYZ) where “XYZ” is the default to select in a dropdown filter by search field. For example, a custom-coded field may have something like “10001” for the “XYZ,” but the static could be “Active” (no quotes) for XYZ.

NOTE: This will not work on every domain because some have specifically overridden the dropdown behavior for search fields instead of using the core Origami dropdown functionality.

For help on how to use this functionality, consult the Forms/Screen Help documentation page.

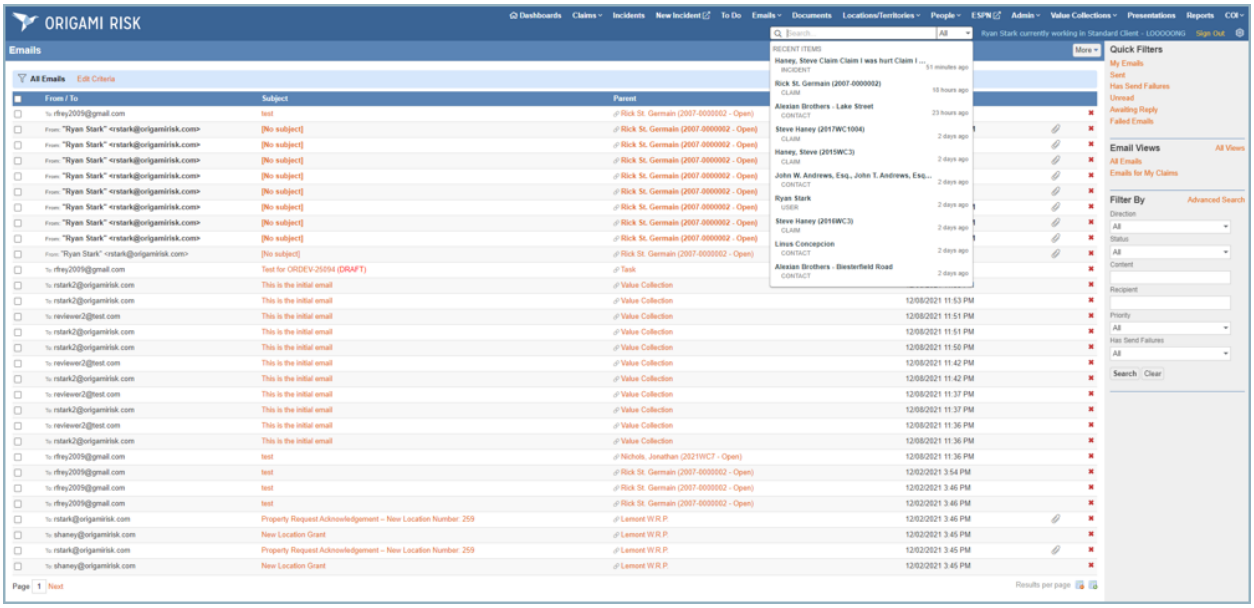


Global Search

Ability to Search All Domains

It is now possible to set “All” as the default on the Global Search drop-down, allowing the user to search all domains and not just the domain that they are currently viewing.

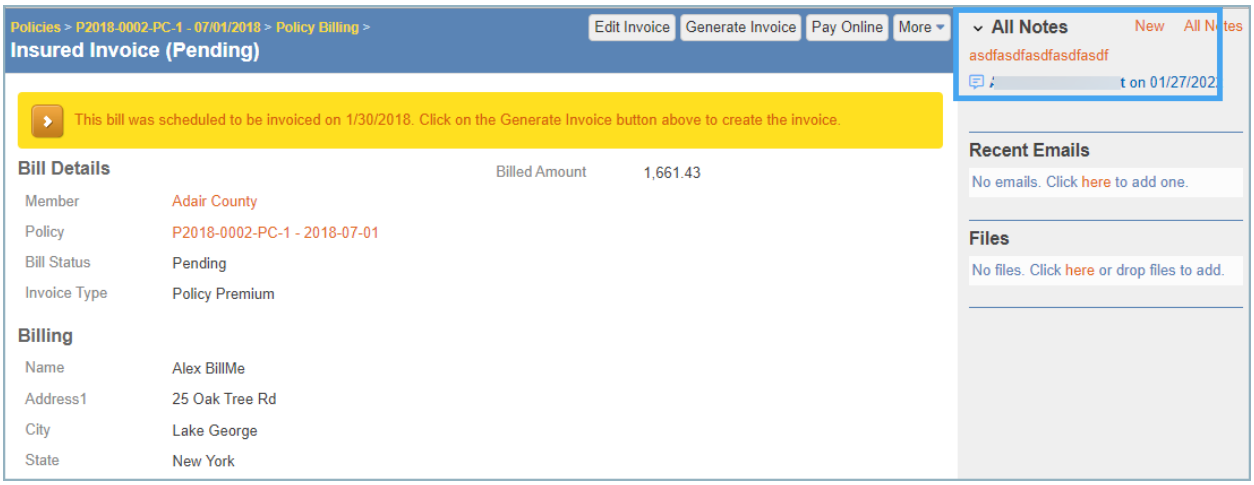
NOTE: This functionality must be enabled by your Service Representative.



Notes

Ability to Add Notes to Member Transactions

It is now possible to add notes to Member Transactions.



Governance, Risk, and Compliance (GRC)

BCM

BCM Doc Template - Label Updates

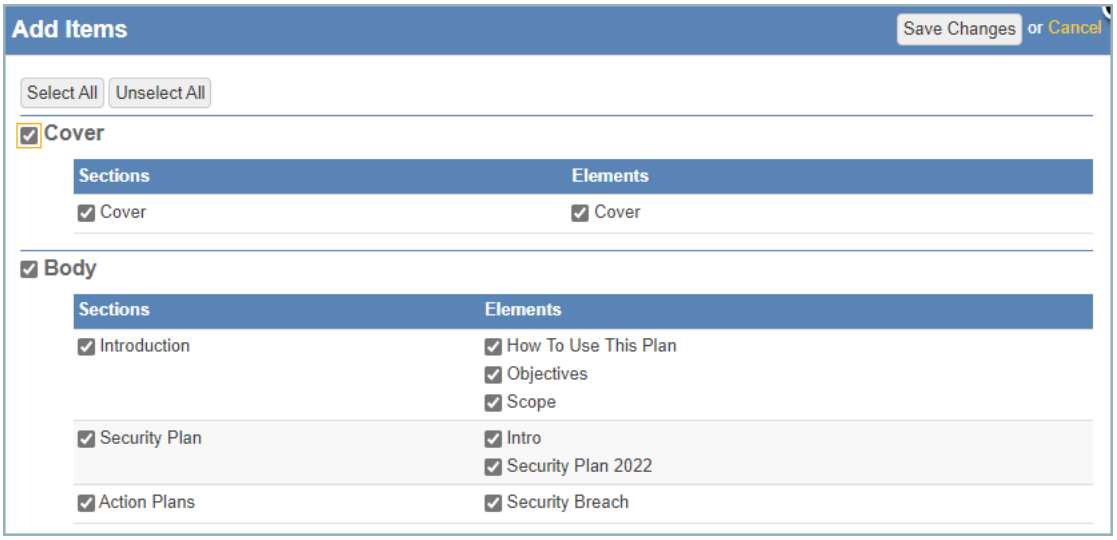
The Elements grid label “Last Modified“ has been changed to “Last Reviewed“ and “Modified User” has been changed to “Reviewed By.”

BCM Plan Template Setup UX Enhancements

Currently, you can set up individual areas and then elements one at a time for BCM templates. If you have many of reach, this process can be very time-consuming. To help alleviate this issue, Origami has made UI enhancements.

On a Document Template view page, the “+ Add Area” link above the Area grid has been replaced with “Add Items.”

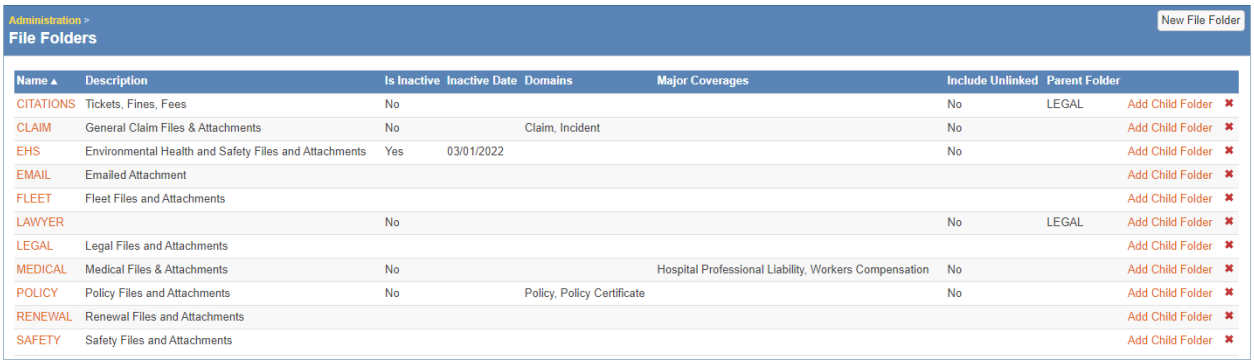
On the Add Items screen, users can now add multiple areas, sections, and elements to the document template.



General

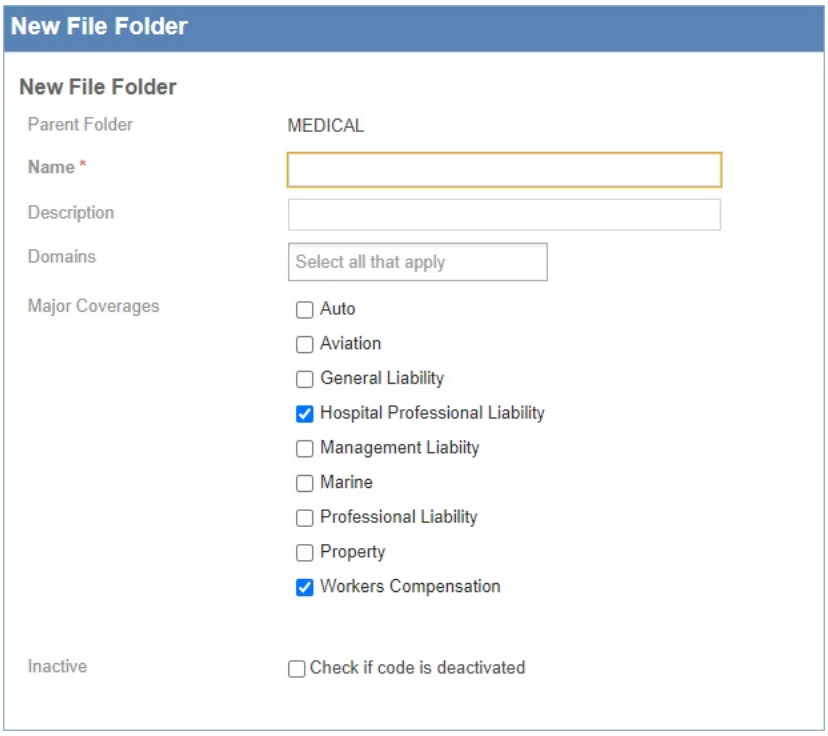
Parent/Child Relationships Added to File Folders

A new link has been added to each row of the File Folder view to allow adding a child folder to the specific folder.



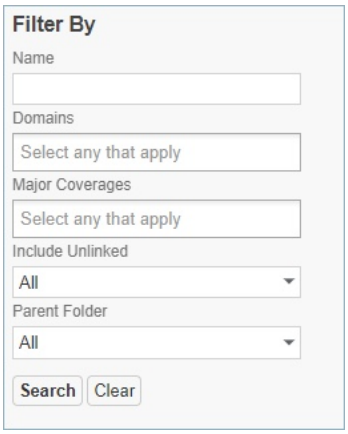
Name ▲	Description	Is Inactive	Inactive Date	Domains	Major Coverages	Include Unlinked	Parent Folder	
CITATIONS	Tickets, Fines, Fees	No				No	LEGAL	Add Child Folder ✖
CLAIM	General Claim Files & Attachments	No		Claim, Incident		No		Add Child Folder ✖
EHS	Environmental Health and Safety Files and Attachments	Yes	03/01/2022			No		Add Child Folder ✖
EMAIL	Emailed Attachment							Add Child Folder ✖
FLEET	Fleet Files and Attachments							Add Child Folder ✖
LAWYER		No				No	LEGAL	Add Child Folder ✖
LEGAL	Legal Files and Attachments							Add Child Folder ✖
MEDICAL	Medical Files & Attachments	No			Hospital Professional Liability, Workers Compensation	No		Add Child Folder ✖
POLICY	Policy Files and Attachments	No		Policy, Policy Certificate		No		Add Child Folder ✖
RENEWAL	Renewal Files and Attachments							Add Child Folder ✖
SAFETY	Safety Files and Attachments							Add Child Folder ✖

A child folder will have the **Is Inactive**, **Domains**, **Major Coverages**, and **Include Unliked** options defaulted to whatever is set on the parent folder.



Saving the child folder will show the name of the Parent Folder in the folder grid. Multiple levels of children can be added by adding a new child to an existing child folder.

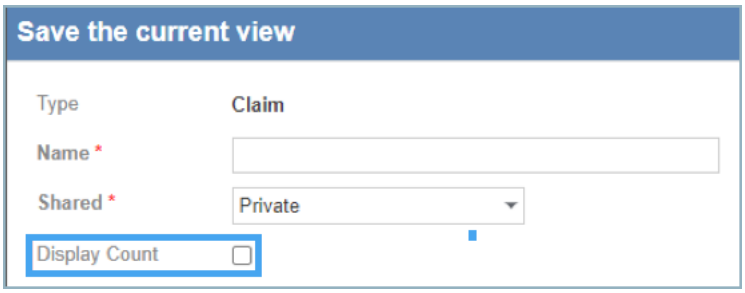
A Filter By section has also been added that gives the ability to search by parent folder.



"View All" and "Last" Added to Each Domain Page

First/Last navigation options have been added to the Index pages of GRC domains.

Links will be enabled only for views that have 'Display Count' enabled.



Survey Management

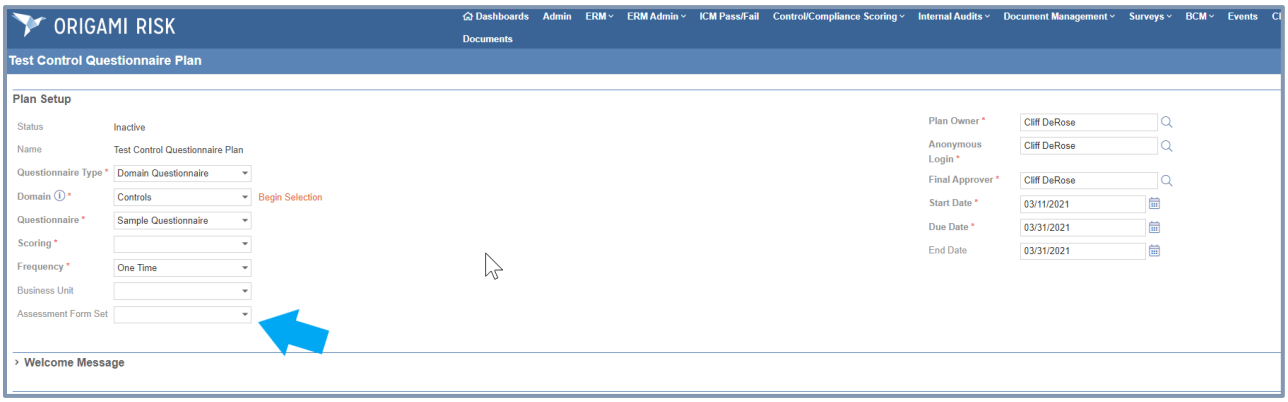
Icon Added for Resending Email

An email icon has been added to the right of the URL on the Survey Assignments views for non-completed and non-pending statuses. Clicking the email icon will resend the "activation" email to the current assignee, which includes the URL for the survey.

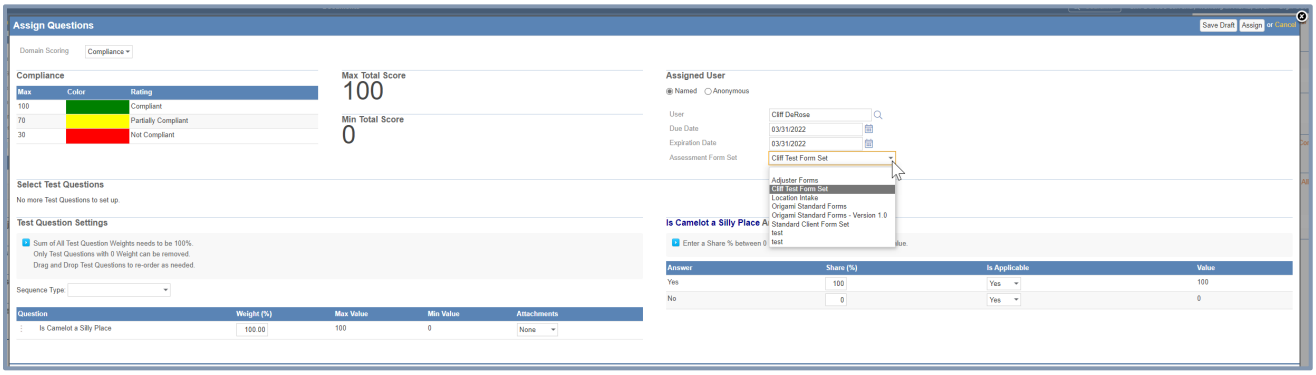
Questionnaire

Ability to Set Custom Assessment Form in Questionnaires and Test Questions

Origami has added the ability to select a governance form from another form set in Questionnaires and Test Questions. For Questionnaire Plans, the custom **Assessment Form Set** drop-down was added to the Questionnaire Plan edit screen.



The custom **Assessment Form Set** drop-down was added to the **Assigned User** section for **Assign Questions** directly from a domain entity.



An example of the view form using a custom Assessment Form Set for the governance being assessed is shown below:

If no custom assessment form set is specified, either on a questionnaire plan or a one-off assessment (e.g., assign questions), then whatever the current user's current form set is will be utilized.

Healthcare

Transactions

Expanded Check Payments and Transactions to Hold 12 ICD-9 Diagnosis Codes

The prior HCFA form only allowed four ICD-9 diagnosis codes and their references. The new HCFA form allows 12. Therefore, ICD-9 diagnosis codes 5-12 have been added to capture all twelve coming back from Medical Bill Review vendors.

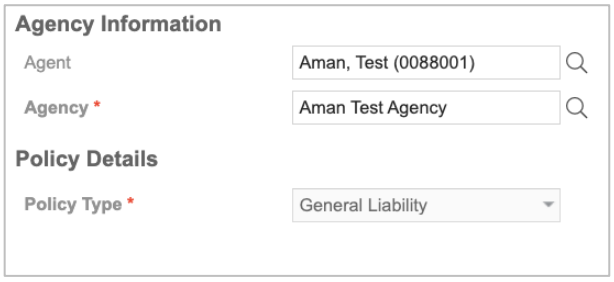
Pools/Carriers

Agency Information

Ability to Lookup Agency Information by Agent

Currently, the Agency must be selected first, followed by the Agent to lookup Agency information. To allow for the child dependency, like Agent, to be selected first, add the allow **Child Dependency First** field property to the field's XML similar to the example below:

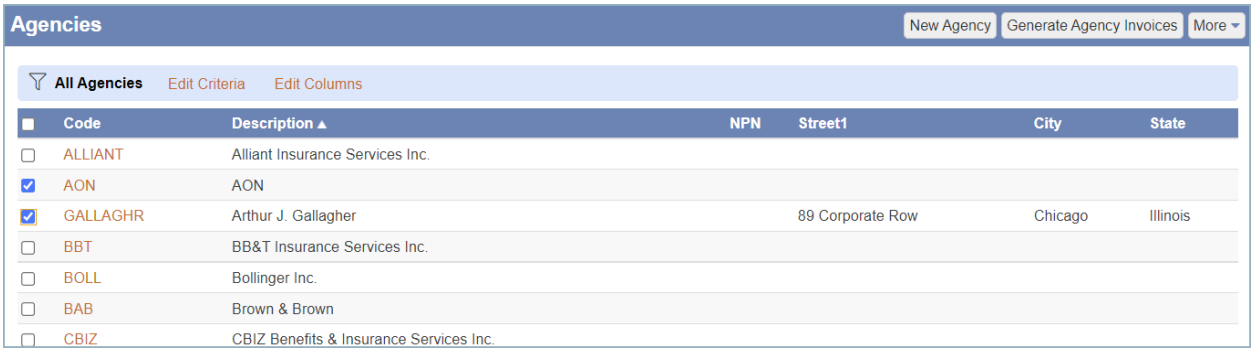
```
<field name="Agent" allowChildDependencyFirst="true" />
```

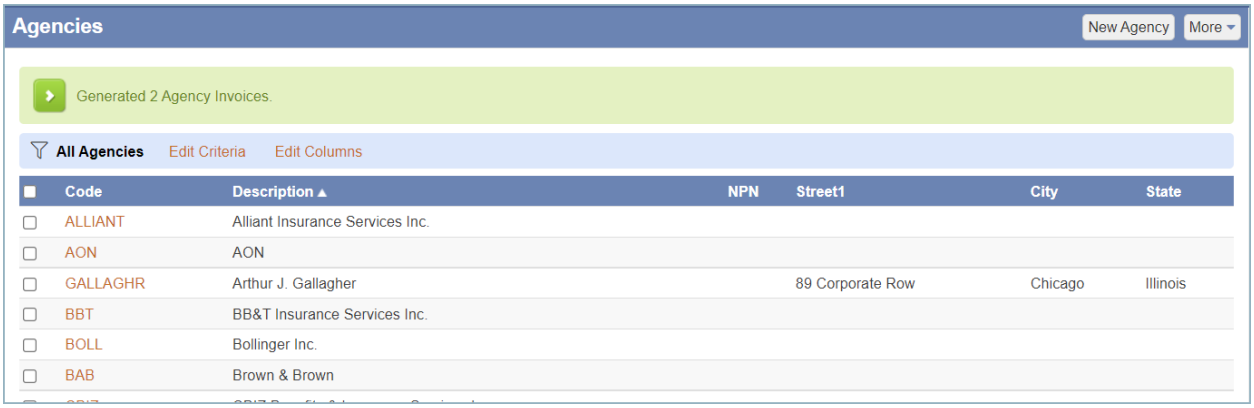


Agency Bill

Ability to Generate Bill Statements Manually if Auto Generate Agency Statements Are Turned Off

Currently, there is no way to manually generate an agency statement for a broker. If the rating is set to use agency statements, but the Auto Generate Agency Invoice is flagged 'false,' there is no way to generate an agency statement. It is now possible to select brokers from the index page and to generate invoices for them.



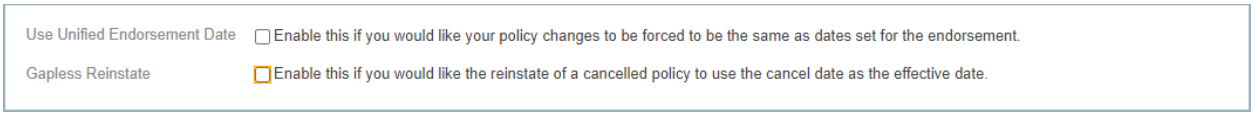


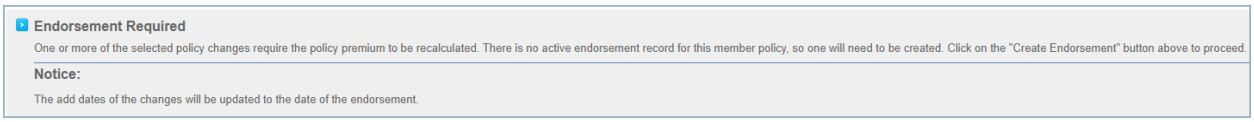
Policy Changes

Update to Policy Change Effective Dates

The following two new options have been added under the Rating program:

- **Use Unified Endorsement Dates:** If selected, policy changes that are added to the endorsement will have their start dates updated to reflect the effective date of the endorsement. When a change is added to an endorsement, the start date will be populated with the effective date of the endorsement and if the user change and saves, the system will display a correct date prompt.
- **Gapless Reinstate:** If this option is selected when reinstating a change, the date will be filled out. If the date is changed and saved, the system will alert the user to the correct date.

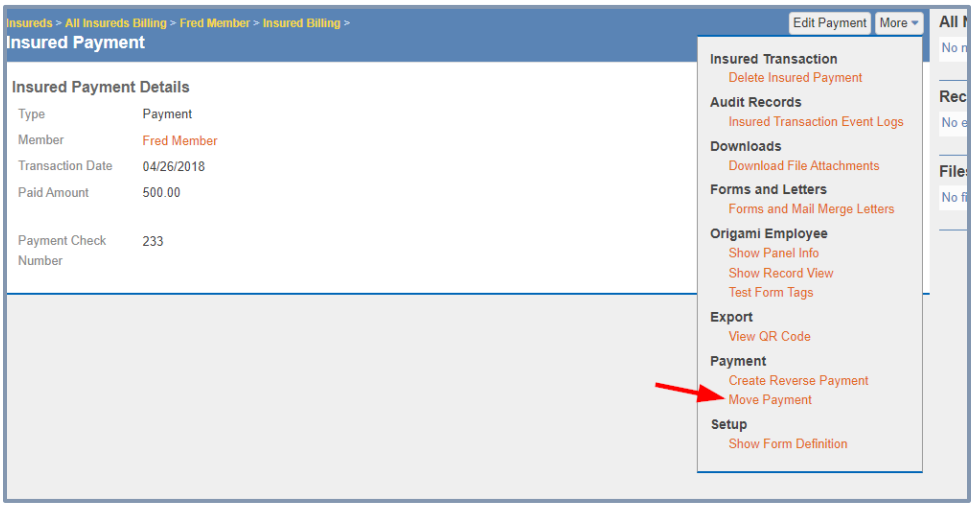


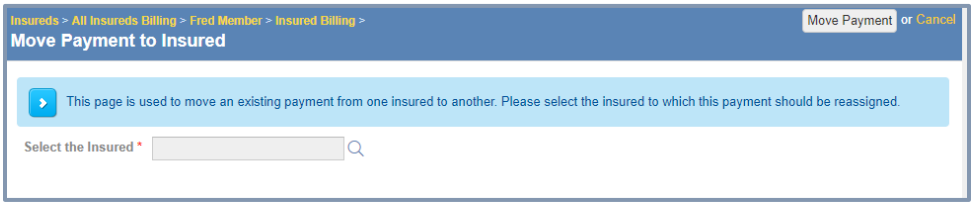


Premium Billing

Ability to Move Payment from One Member to Another

Origami has added the ability to move a payment from one member to another, accessible via a new menu entry when viewing payment records. The original payment is reversed after it is moved.



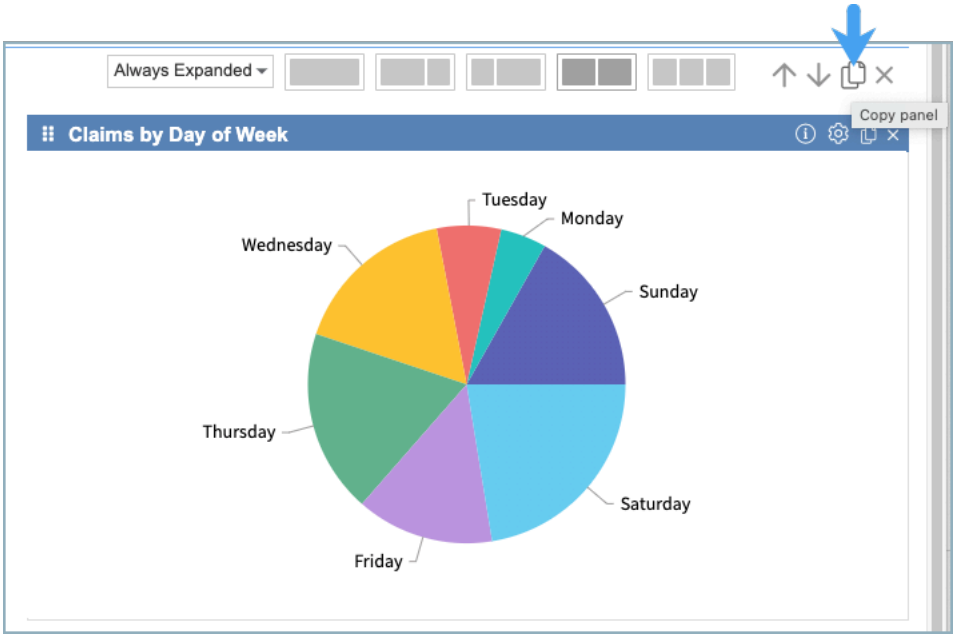


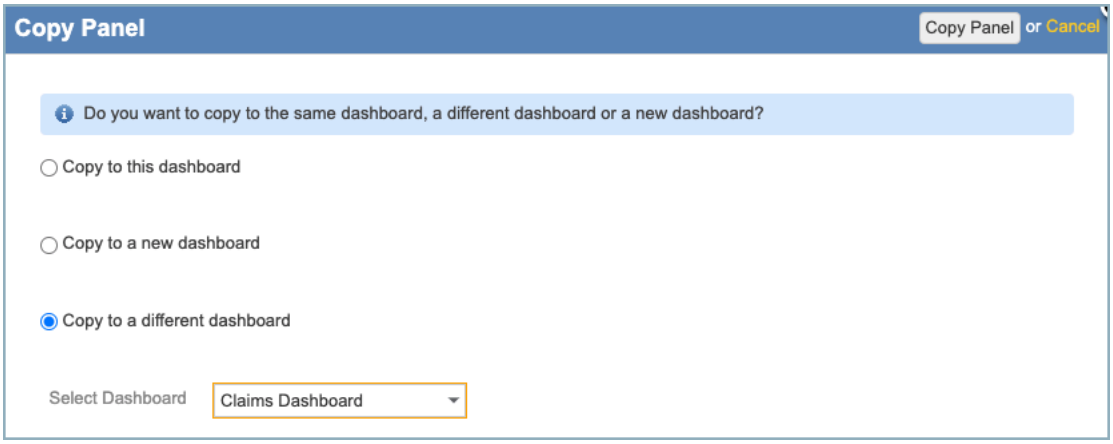
Reports & Dashboards

Dashboards

Ability to Copy a Dashboard Panel to Another Dashboard

It is now possible to a copy a dashboard panel to another dashboard.





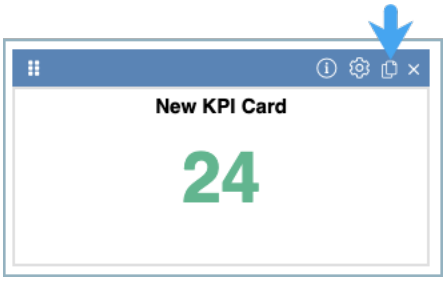
Custom Widget Builder – Ability to Define First Month on X-Axis

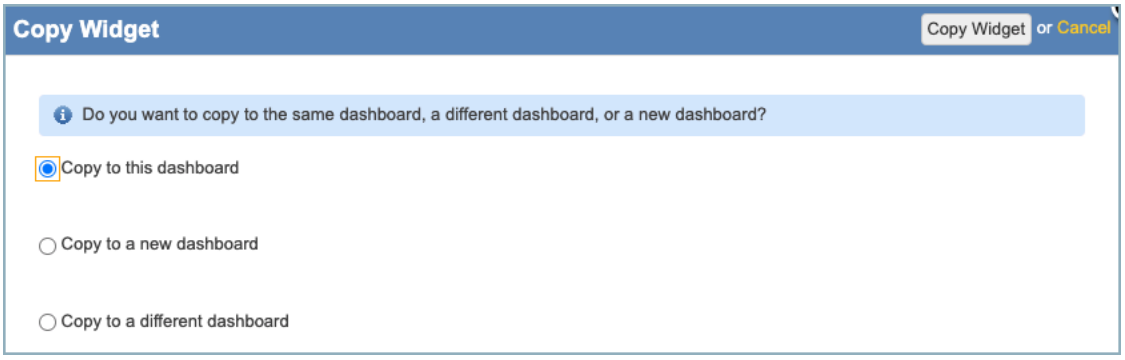
There is now an option to select the starting month under Data Options in the custom widget builder for the following chart types:

- Bar
- Column
- Line
- Stacked bar/column
- Multi bar/column
- Line/bar combo
- Heat map
- Summary grid

Dashboard KPI Cards – Ability to Copy/Move to Another Dashboard

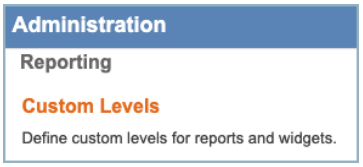
It is now possible to copy or move a KPI card to another dashboard.



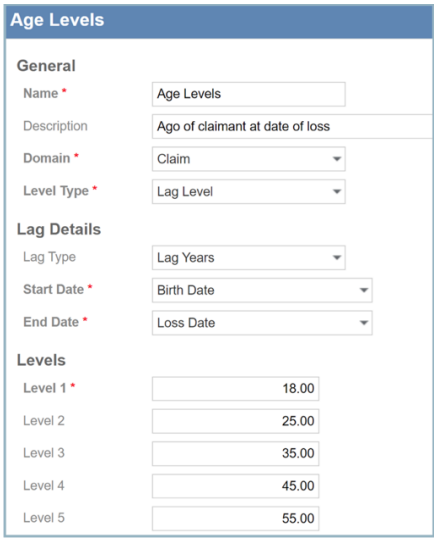


New Custom Levels Section in Admin

Origami has added a new section called “Custom Levels” in **Admin → Reporting**. This section will support Lag and Loss levels.

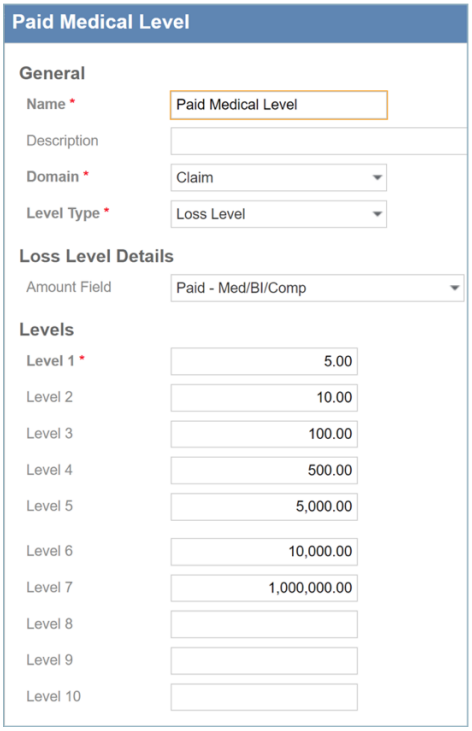


Example of a Lag Level Edit Page

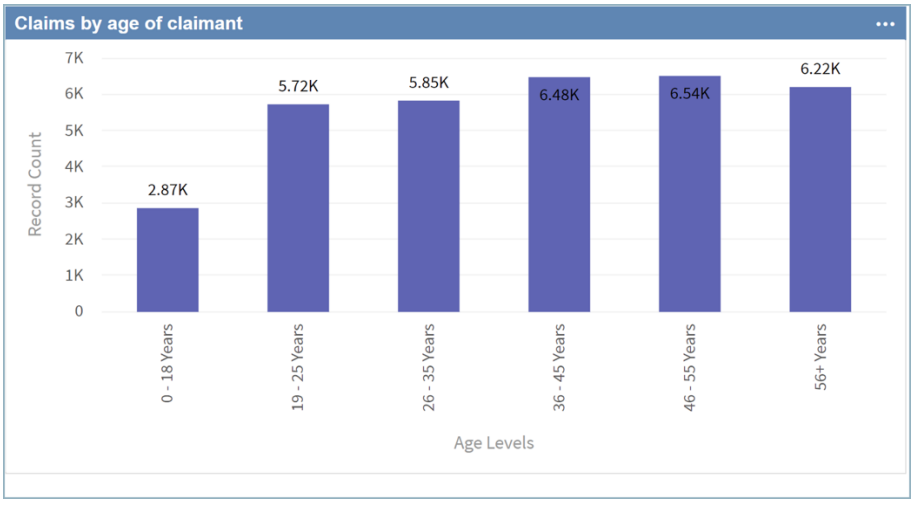


The Level Type is Lag or Loss Level. If Lag Level, the Lag Details section will display. Lag Type can be days, months, or years, depending on the typical lag range. For lags, select two dates from the domain and up to five levels.

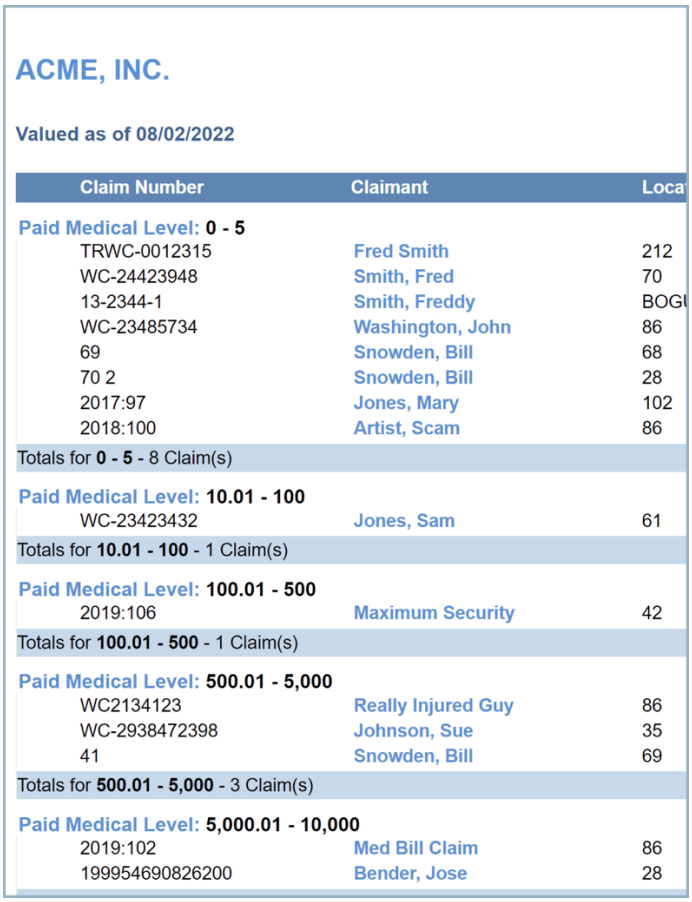
Loss Levels Example



For loss levels, you simply select a numeric field. Loss levels allow up to 10 levels. Once created they will appear as group fields in reports/dashboards for the appropriate domain. A widget might look like this:



A report might look like this:



ACME, INC.

Valued as of 08/02/2022

Claim Number	Claimant	Loca
Paid Medical Level: 0 - 5		
TRWC-0012315	Fred Smith	212
WC-24423948	Smith, Fred	70
13-2344-1	Smith, Freddy	BOGU
WC-23485734	Washington, John	86
69	Snowden, Bill	68
70 2	Snowden, Bill	28
2017:97	Jones, Mary	102
2018:100	Artist, Scam	86
Totals for **0 - 5** - 8 Claim(s)		
Paid Medical Level: 10.01 - 100		
WC-23423432	Jones, Sam	61
Totals for **10.01 - 100** - 1 Claim(s)		
Paid Medical Level: 100.01 - 500		
2019:106	Maximum Security	42
Totals for **100.01 - 500** - 1 Claim(s)		
Paid Medical Level: 500.01 - 5,000		
WC2134123	Really Injured Guy	86
WC-2938472398	Johnson, Sue	35
41	Snowden, Bill	69
Totals for **500.01 - 5,000** - 3 Claim(s)		
Paid Medical Level: 5,000.01 - 10,000		
2019:102	Med Bill Claim	86
199954690826200	Bender, Jose	28

"Show Record Count" Total Update

The "Show Record Count" total will now display a drilldown link on widgets based on the report data sets.

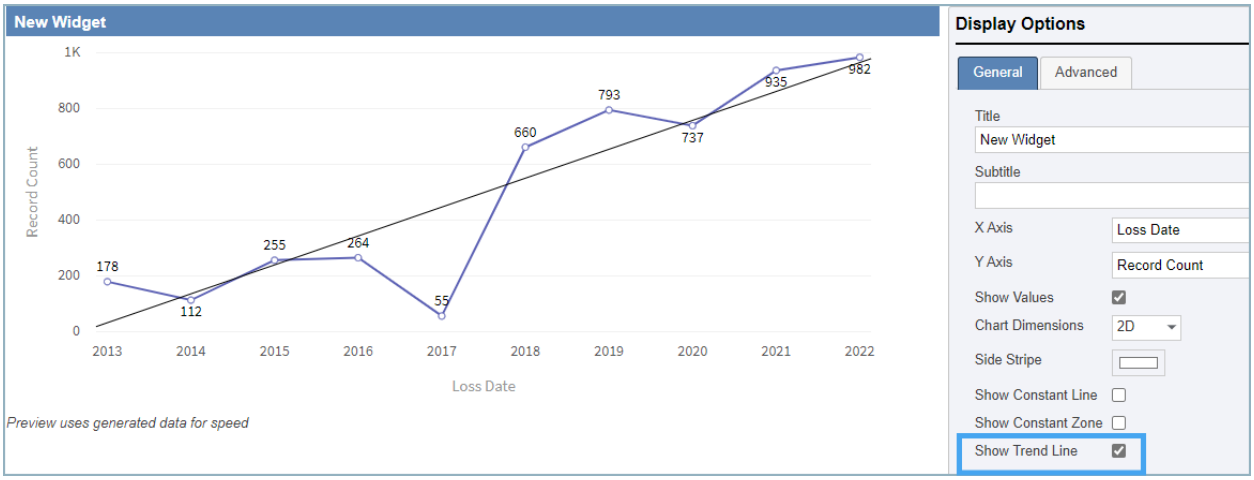
Show Total Record Count Data Set ...

Claim Number	Claimant	Total Incurred
10-1	EMC Test Copied Claim	0.00
2007-0000001		2,571.43
2007-0000002		5,142.86
2007-0000003		3,142.86
2007-0000004		7,848.57
2007-0000005		5,133.43
2007-0000006		9,511.71
2007-0000007		8,186.29
2007-0000008		14,658.57
2007-0000009		13,210.71
		69,406.43

1 to 10 of 127

"Show Trend Line" Option

For bar, column, or line charts, there will now be an option called "Show Trend Line" right after the Show Constant Line/Zone options. If checked, Origami will use the least-squares regression method of computing a trend line.



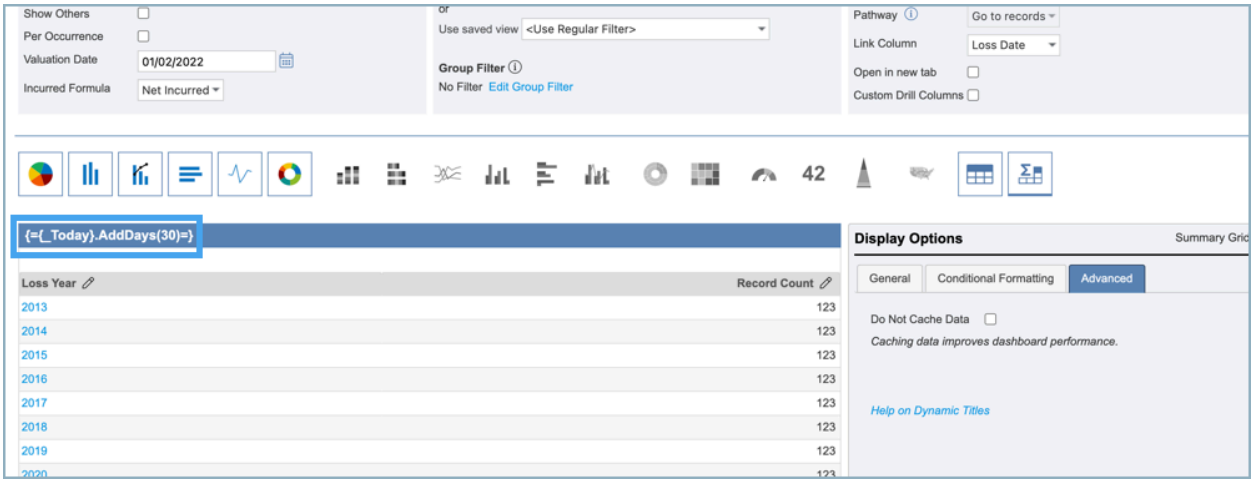
Widget – Dynamic Titles/Subtitles/Grid Column Headers

Origami will now allow formulas for titles, subtitles, and grid column header so that they can be dynamic. This will support standard form processor tags like mail merge:

https://live.origamirisk.com/Origami/LetterTemplates/Help

The standard tags and formatting will work but fields like Loss Date cannot be used because there is not a single record involved. Origami will translate all properties from the Option Form or widget options, so a widget with two pval dates would be able to reference those.

NOTE: Relative dates will be evaluated, so if you use {Pval} as a tag and it is set to "First Day of Last Month," it will display (if run on 2/3/2022) as 1/1/2022.



Custom Widgets Apply Business Unit Access Security

Custom Widgets will now apply Business Unit Access security on domains that use it. Logged in as a user with full permission to Business Units, a user will get the below results: Note the Risk with the "Unit 1" Business Unit.

Risk Grid

Name	Risk Category	Business Unit
Data Protection Due Diligence	Compliance	None
Data Security and Data Privacy	Compliance	None
Failure to invest in and update technical infrastructure	Compliance	None
Global Privacy Risk	Compliance	None
I am a subrisk to MARY TEST	Compliance	None
I am also a subrisk to MARY TEST	Compliance	None
Inadequate procedures	Compliance	None
Ineffective understanding of data privacy & security implications	Compliance	None
MARY TEST	Compliance	None
Polar Vortex impacting our CHI office	Compliance	None
Risk & Control Matrix	Compliance	None
Security & On-Going Security Monitoring	Compliance	None
Test	Compliance	None
Volatility in Global Financial Markets	Compliance	Unit 1
Volatility in Global Financial Markets - Denver	Compliance	None

Alternatively, another user who has limited Business Unit Access and does not have access to the Unit 1 Business Unit, will get these results from the widget:

Risk Grid

Name	Risk Category	Business Unit
Data Protection Due Diligence	Compliance	None
Data Security and Data Privacy	Compliance	None
Failure to invest in and update technical infrastructure	Compliance	None
Global Privacy Risk	Compliance	None
I am a subrisk to MARY TEST	Compliance	None
I am also a subrisk to MARY TEST	Compliance	None
Inadequate procedures	Compliance	None
Ineffective understanding of data privacy & security implications	Compliance	None
MARY TEST	Compliance	None
Polar Vortex impacting our CHI office	Compliance	None
Risk & Control Matrix	Compliance	None
Security & On-Going Security Monitoring	Compliance	None
Test	Compliance	None
Volatility in Global Financial Markets - Denver	Compliance	None

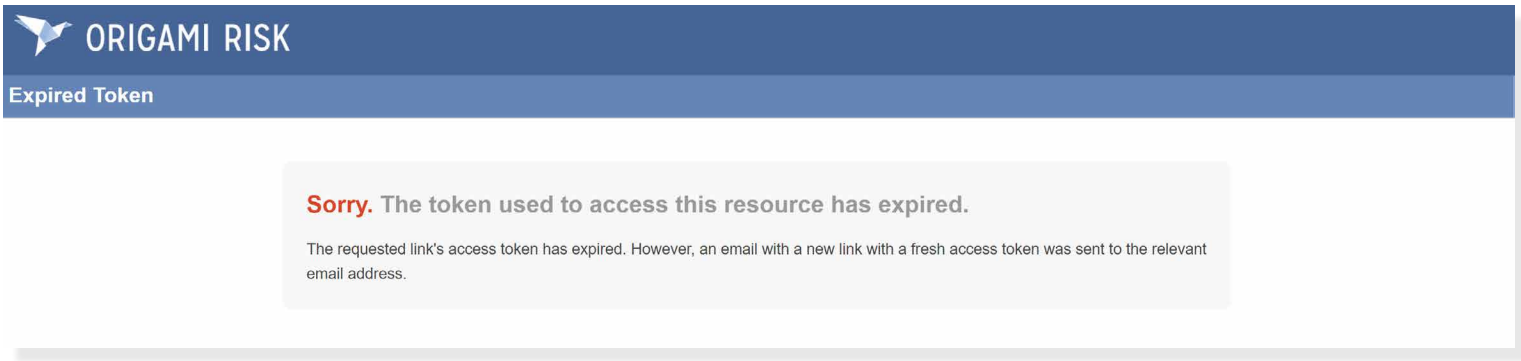
The widget data is cached, if business unit access security is changed for a user, the widget data will need to be refreshed for the results to show the expected changes.

UPDATE TO VALUES COLLECTION LINKS

What's Changing

With our product release on April 9, 2022, we updated the Values Collection links to add another layer of security to the process.

Prior to this release, when a values collection link was created and distributed, the link did not expire and was accessible as long as the values collection is active. **With this release, values collection links will expire thirty (30) days from the date they are generated.** Link tokens will be inserted in to the URLs when they are generated, and through these tokens, the Origami system can validate whether the date the token was generated is less than 30 days ago. If the link has expired, the user trying to access the link is sent to an inactive page letting them know that they will be immediately emailed a new, active link to the email address provided. See below for an example of that page:



Next Steps

If you have an active values collection with a link that was generated prior to April 10, 2022, that link will no longer be valid on May 1, 2022. For any values collection links generated on or after April 10, 2022, they will generate with the new rules in place and expire after 30 days.

To make sure your link recipients always have a valid link, we recommended that you send out reminder (follow-up) emails at least once every 30 days. Each time a follow-up email is sent, a new link will be created that will be valid for 30 days from the time of generation. If you have any additional questions, please contact your Origami Service team.