



**ORIGAMI RISK**

**January 2023  
Client Release Notes**

## **Disclaimer**

These release notes cover the whole gamut of offerings from Origami Risk. You may or may not have these options in your system. Also, depending on your User Rights, you may not be able to access some of these features. Lastly, your System Administrator may have changed the way these items are named in your system.

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# New Solution

## New STP RegHub integration

### Why

STP RegHub is a service providing access to a continuously updated library of regulatory documents containing information related to environmental, health, safety and transportation laws and regulations.

Importing data from STP regulations records is crucial to understand and ensure compliance with laws and regulations that specific jurisdictions enforce on the locations Origami Risk customers operate in.

The STP RegHub platform underwent updates, where certain fields are differently named or new fields are now added, and the current Origami Risk RegHub integration now supports these changes.

### Previously

You could not import data from the STP RegHub platform.

### New solution

You can import data from the STP RegHub platform so that you have the latest regulatory information relevant to you.



If you want to use this feature, see your Origami Service Administrator to update your system settings.

### How and where

1. From the main menu, select **Risk Governances > Regulations**.
2. Select **More > Edit Import Schedule**.
3. On the **Edit Risk Governances Import Schedule** screen, provide the relevant data.
4. Select **Save Schedule**.

## New ICD Codes Solution

### Why

CMS updates ICD Diagnosis and ICD Procedure Codes two times per year. Maintaining updated codes ensures the most accurate claims tracking and reporting.

### Previously

There was a standard ICD Diagnosis Codes table where ICD Diagnosis codes had to be manually updated. Also, Custom Defined Entities (CDEs) had to be created to store and manually update ICD Procedure Codes.

### New solution

A new standard table has been created to store ICD Procedure Codes and a new process has been developed that will systematically update ICD Diagnosis Codes and ICD Procedure Codes two times per year.

## What's new?



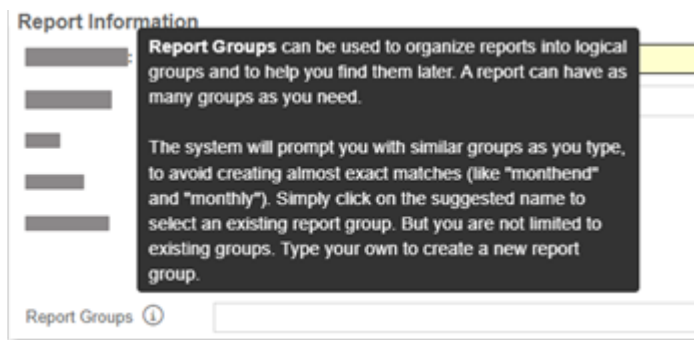
If you don't see the new or changed features, ask your System Administrator to update your permissions.

## System-wide

### Expand long tooltips in a new popup

#### Previously

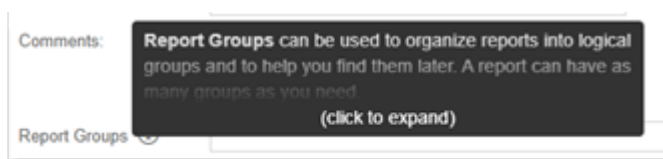
Tooltips are displayed in their entirety, regardless of how long they are. This can still be true.



#### Now

When this option is activated, only the first few lines of tooltips are displayed. You can then select **Click to expand** on a truncated tooltip to see the entire tooltip in a popup screen.

This is especially helpful, for example, when you have lengthy tooltips that contain important regulatory information.



If you want to use this feature, see your Origami Service Administrator to update your system settings.



## View main menu items, right-panel, and column header rows when scrolling

### Previously

When you scrolled down a page, the main menu items, the items in the panel on the right, and the header row for columns in a table did not remain visible.

### Now

When this option is activated, and you scroll down a page:

- An additional scrollbar is available.
- The following remain visible:
  - The main menu items
  - The right-side panel items
  - Header rows inside tables



If you want to use this feature, see your Origami Service Administrator to update your system settings.

## View side panel on mobile devices and web browsers

### Previously

It was difficult to determine how to open the side panel when using the system on your Mobile devices or on a web browser that was zoomed in.

**Now**

The Open Side Panel button has been enlarged.

**How and where**

When on a page that has the right-side panel, use the Open Side Panel Button to view the right side panel.



## View all private tasks

**Previously**

When a task was private, only the user who created the task and the task owner (primary and backup) could view it.

**Now**

Private tasks can also be viewed by users with the **View Private Tasks** role permission enabled.

**New role permissions**

<b>View Private Tasks</b>	Allows you to view any task that was marked as private.
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## Expand or collapse all panels at once

**Previously**

For custom forms, you had to expand or collapse every panel individually.

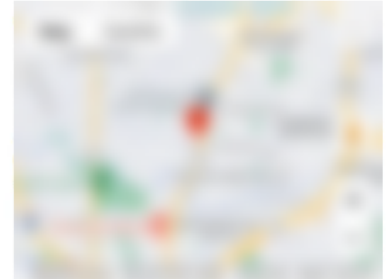
**Now**

You can expand or collapse all panels at once with a single **Expand All / Collapse All** option.

Default Location Hierarchy: Corporate > South Region > Atlanta

**Expand All**

Atlanta (LOCB2C1)



> Construction

> Occupancy

> Protection

**New fields**

<b>Expand All</b>	Expands all panels on the screen. When selected, changes to <b>Collapse All</b> .
<b>Collapse All</b>	Collapses all panels on the screen. When selected, changes to <b>Expand All</b> .

### How and where

- When creating or editing a custom form, at the form level, add the `enableExpandCollapseAll` attribute.

```
<?xml version="1.0" encoding="utf-8" ?>
<form enableExpandCollapseAll="true"><panel title="Location Details">
  <column>
    <section>
      <field name="LocationNumber"/>
      <field name="Name"/>
      <field name="BuildingDescription"/>
      <field name="PropertyType"/>
      <field name="HazardousType"/>
      <field name="OSHA"/>
      <field name="Currency"/>
      <field name="TimeZone"/>
    </section>
  </column>
</form>
```



This functionality works only when two or more panels have the `enableExpandCollapseAll` value set to `true`.

```
<panel title="Construction" enableExpandCollapse="true">
```

### To create a custom form:

- From the main menu, select **Admin**.
- In the **Fields, Labels and Forms** section, select **Custom Forms**.
- From the list, select your forms set.
- For the form you want to modify, in the **View Mode** or the **Edit Mode** column, select **Edit Form** or **New Form**.



You can create custom forms for both modes.

- Edit the XML as needed.

You can find the descriptions of all parameters on the **Help on Forms XML** screen (`{YourCurrentURL}Origami/forms/help`).

- Save the changes.

Your custom form is ready, and you can find it in **Admin > Custom Forms**.

## Log in without auto complete of user names

### Previously

If you were not using single sign-on (SSO), you were able to select a username from the list of previously-entered usernames.

### Now

You have to enter your username unless you are using SSO. The system no longer gives you a list of previously-entered usernames.



You can still use a password manager to store your system username and password details.

## Filter images added to printable abstracts

### Previously

When creating a Printable Abstract, all attached images for a record would also be added to the abstract. There was no way to filter out only specific images to include in the Abstract.

### Now

You can now use a filter to determine which images attached to a record should also be added to the Printable Abstract. This is similar to how you filter which PDFs attached to a record would also be included in the Printable Abstract.

### How and where

When generating a printable abstract from:

- The **More** button on a record. Select **Printable Abstract**.
- The **More** button > **Bulk Actions**> **Printable Abstract**
- The **New Abstract** Data Entry Event.

Would you like to include any existing images as part of the produced Abstract PDF?

#### Image Contents

None

All

Filter

Enter a filter condition if you would like only certain types of images to be included.

All Files [Edit Filters](#)

## Associate a contact with another contact

### Previously

This functionality was not available.

### Now

You can now associate one Contact with another.

### How and where

1. Open a Contact.
2. Associate this Contact with another Contact using:
  - The **Contacts** Side Panel. Click **All Contacts** or **Here**. Then, search for the contact in the **Attach Contact** side panel. Once you find the contact, click **Submit** to attach the Contact.
  - The **More** menu > **Associated** > **Contacts**

## Administration

### Access Management

#### Add custom titles, headers, and footers to all Anonymous Collection screens in a collection category

### Previously

This functionality was not available.

**Now**

You can now customize the look and feel of all Anonymous Collection screens in a Collection Category.

**New fields**

On the Collection Categories screen, in the new **Welcome Page** section.



You will be responsible for all content and links added to these fields.

**Welcome  
Page Title**
**Page  
Header Text**

The header is displayed below the **Welcome Page Title**.

**Page  
Footer Text**
**Custom  
Styling  
Options**


Only use this if you are proficient in HTML/CSS.

Use this field to apply valid custom CSS styling to the elements on the Collection Category page.

For example, the default Collection Category items are defined by the CSS selector `#anonymousWelcome a.createButton` on the anchor tags that could be overridden to present the links in a different way.

**Custom  
Welcome  
Page HTML**


Only use this if you are proficient in HTML/CSS.

Use this field to design a custom Web Page using HTML.

See tips below.

**Tips for creating a custom welcome page using HTML**

- The Custom HTML will be wrapped in the section tag `<div>` with id `anonymousWelcome`.

- The following tags can be used within the HTML to auto-generate content:
  - `{WelcomePageText}`: Content will use the **Page Header Text** content defined above.
  - `{WelcomePageFooterText}`: Content will use the **Page Footer Text** content defined above.
  - `{CollectionCategoryItemAnchorTag-[CategoryId]}`: This will produce an HTML anchor tag (i.e. `<a>`) for the Collection Category Item ID noted in the tag. If the Collection Category Item allows Incident drafts, the anchor will be wrapped in a span along with a link to access the drafts. If the Collection Category Item is not part of the Collection it will not resolve the tag. To identify the Collection Category Item ID, copy the hyperlink of the Link Item you're interested in from the Anonymous Collection Category view page. The link will contain the `CollectionCategoryItemID` for that item. Note you will replace the `[CategoryId]` with the numeric ID value.
  - `{CollectionCategoryItemURL-[CategoryId]}`: This will produce just the URL string for the Collection Category Item ID noted in the tag. You can use this tag if you'd like to create a custom anchor tag or button. If the Collection Category Item is not part of the Collection it will not resolve the tag. To identify the Collection Category Item ID, copy the hyperlink of the Item you're interested in from the Anonymous Collection Category view page. The link will contain the `CollectionCategoryItemID` for that item. Note you will replace the `[CategoryId]` with the numeric ID value.
  - `{AssetURL:[filename]}`: This will produce a URL for files attached to the Incident Collection. This is useful if you have static assets like images or logos that you want to refer to in your html.
- You can also generate HTML to be used with each item.

Everything between `{CollectionLinkItems}` and `{/CollectionLinkItems}` will be generated for each item in this collection category.

- `{Item.ImageIconURL}`: Gives the URL to the item's icon, if it exists.
- `{Item.ButtonText}`: Gives the item's button text, if it exists.
- `{Item.HelpText}`: Gives the item's button hover text, if it exists.
- `{Item.ActionURL}`: Gives the link to the item's collection page.
- `{Item.DomainName}`: Gives the item's domain name.
- `{Item.Sequence}`: Gives the item's sequence.



### How and where

**Admin > Anonymous Collection Groups**

#### New Collection Category

Save Changes Cancel

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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#### Welcome Page

Welcome Page Title: \_\_\_\_\_

Page Header Text: \_\_\_\_\_

Page Footer Text: \_\_\_\_\_

---

#### Custom Styling Options

CSS ⓘ \_\_\_\_\_

1

Sample of what buttons/links will look like...

Test Button 1 Test Button 2 Test Button 3

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i \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Custom Welcome Page HTML: \_\_\_\_\_

1

## Add custom icons for collection category items

### Previously

You could not add custom icons for collection category items.

### Now

For each collection category item, you can upload an image and create a custom icon.

**How and where**

1. From the main menu, select **Admin**.
2. In the **Account** section, select **Anonymous Collection Groups**.
3. Select a collection category.
4. Select **New Collection Category Item**.
5. In **Image Icon File**, select **Choose File** and upload an image.

## Create a user from a contact record

**Previously**

It was not possible to automatically create a user account based on a contact record.

**Now**

On a contact record, you can now create a user account for the contact using a new field called **Create User**, and a Data Entry Event. When a user account is created, an email containing a login and a password is sent to the user.

**New fields**

<b>Create user</b>	Allows you to create a user account from a contact record.
--------------------	--

## How and where

To set up a data entry event:

1. From the main menu, select **Admin**.
2. In the **Fields, Labels and Forms** section, select **Data Entry Events**.
3. Select **New Data Entry Event**.
4. Select **Contacts**.
5. In the **Condition** section, do the following:
  - Set **First Name** to **is not empty**.
  - Set **Last Name** to **is not empty**.
  - Set **Create User** to **is true**.
  - Set **Email1** to **is not empty**.
6. Select **Save Changes**.
7. On the **Data Entry Event Details** screen, in the **Actions Triggered by Event** section, from the **Create a new action...** drop-down, select **New User**.
8. On the **New Action** Screen, provide the relevant data.
9. Select **Save Changes**.

To create a user from a contact record:



To create a user account, the `<field name="CreateUser"/>` must be added to the **Edit Contact** custom form located in **Admin > Custom Forms**.

1. From the main menu, select **Contacts**.
2. Do one of the following:
  - Select an existing contact from the list.
  - Select **New Contact**, and provide the relevant data.
3. From the **Create User** drop-down, select **Yes**.
4. Select **Save Changes**.

## Create a user from an employee record

### Previously

It was not possible to automatically create a user account based on an employee record.

**Now**

On an employee record, you can now create a user account for that employee using a new field called **Create User**, and a Data Entry Event. When a user account is created, an email containing a login and a password is sent to the user.

**New fields**

<b>Create user</b>	Allows you to create a user account from a employee record.
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### How and where

To create a data entry event:

1. From the main menu, select **Admin**.
2. In the **Fields, Labels and Forms** section, select **Data Entry Events**.
3. Select **New Data Entry Event**.
4. Select **Employees**.
5. In the **Condition** section, do the following:
  - Set **First Name** to **is not empty**.
  - Set **Last Name** to **is not empty**.
  - Set **Create User** to **is true**.
  - Set **Email1** to **is not empty**.
6. Select **Save Changes**.
7. On the **Data Entry Event Details** screen, in the **Actions Triggered by Event** section, from the **Create a new action...** drop-down, select **New User**.
8. On the **New Action** Screen, provide the relevant data.
9. Select **Save Changes**.

To create a user from an employee record:



To create an employee account, the `<field name="CreateUser" />` must be added to the **Edit Employee** custom form located in **Admin > Custom Forms**.

1. From the main menu, select **Contacts**.
2. Do one of the following:
  - Select an existing employee from the list.
  - Select **New Employee**, and provide the relevant data.
3. From the **Create User** drop-down, select **Yes**.
4. Select **Save Changes**.

## Audits

### Create Audit Definition and Audit Response access groups with view, edit, or delete access

#### Previously

For audit definitions and audit responses, you could create access groups with only two levels of access:

- Full access
- No access

**Now**

For audit definitions and audit responses, you can create access groups with five levels of access:

- Full access
- Viewing (applies to definitions and responses)
- Editing (applies to responses)
- Deleting (applies to responses)
- No access

Audit Definition	Full Access	View Audit Definition	Edit Audit Response	Delete Audit Response
Claim Audit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Incident Audit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location Audit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety Audit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

For example, a single user can have full access to one group of audit definitions, and view-only access to another group of audit definitions.



Users still need to have the required role permissions for audit definitions and audit responses.

**How and where**

- To manage access groups, go to the **Audit Definition Access Groups** screen (**Admin > Audit Definition Access Groups**).

Access groups define which audit definitions users can see, and which audit responses users can create.

- To manage audit definitions, go to the **Audit Definitions** screen (**Admin > Audit Definitions**).
- To manage audit responses, go to the **Audit Responses** screen (`{YourCurrentURL}/Origami/AuditResponses`).

## Use Save as Draft option to save green checkmarks on Audit Responses

**Previously**

When an Audit “owner” makes edits and saves the Audit as a Draft, the system removes 1.) any green checkmarks added during the current draft changes and 2.) all green checkmarks next to categories that were completed and validated through external access links. (This can still be true.)

### Now

When this option is activated, the system will ONLY remove any green checkmarks that were added during the current Save as Draft made by an Audit “owner”. The green checkmarks will be preserved for all previous completions through External Access links.



If you want to use this feature, see your Origami Service Administrator to update your system settings.

### How and where

- **Audits > Audit Responses**

## Exclude a question from scoring in audits

### Previously

You had to create an exclude script for the audit question (audit definition) to exclude the question from scoring.

### Now

On the **New Audit Code** and **Edit Audit Code** screens, you can select a check box to exclude the question from scoring by default.



If you also define an exclude script or a scoring formula for a question, the scripts and formulas override the **Exclude** setting for the audit codes.

### New fields

<b>Exclude</b>	Excludes a question from scoring. When the audit code is used for the Coded, Attestation, and Multi-Select question types, the following applies: <ul style="list-style-type: none"><li>• Coded and Attestation: If a code is set to <b>Exclude</b>, the question is ignored.</li><li>• Multi-Select: If all codes selected for the question are set to <b>Exclude</b>, the question is ignored.</li></ul>
----------------	--

### How and where

1. From the main menu, select **Admin > Audit Code Sets**.
2. Select an audit code set to exclude a question for.
3. In the **Codes** section, select a code.
4. In the **Audit Code Details** section, select **Exclude**.



## Display audit categories without scrolling when importing audit definitions

### Previously

When importing audit definitions, it was difficult to navigate through audits because you had to scroll through both **Audit Category Groups** and **Audit Categories** columns of the audit definition.

### Now

Only **Audit Categories** columns are displayed when importing audit definitions. The new **Jump To** search field in the menu allows you to jump to a location in the list of results.

### New fields

<b>Jump to</b>	Allows you to jump to a location in the list of results
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### How and where

1. From the main menu, select **Admin > Audit Definitions**.
2. On the **All Audit Definitions** screen, select **More > Import AuditHub Template**.

## Claims

### Add the BuildingFacilityID field to Claim and Incident Forms

#### Previously

This field was unavailable in these forms.

#### Now

You can now add the new **BuildingFacilityID** field to Claims and Incidents forms.

#### New fields

<b>BuildingFacilityID</b>	Allows you to add a field for building facilities in claims and incidents forms.
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**How and where**

1. From the main menu, select **Admin > Custom Forms**.
2. Select the correct formset.
3. Select a **View/Edit Claims** form or the **View/Edit Incidents** form.
4. Add the **BuildingFacilityID** field to the form.

## 1099-MISC Extracts updated to match 1099 Pro's new standard import layout changes

**Previously**

Before the update this year, users could not edit Box 17 in the Form 1099 Extract module in Origami. Previously, boxes 13-17 represented other fields.

**Now**

1099 Pro has published updates to their standard import layouts to accommodate IRS regulations for tax year 2022. The following changes were incorporated into the standard 1099 Pro Export in preparation for the year end:

- 1099-MISC: In the Form 1099 Extract module, box 13 is assigned Foreign Account Tax Compliance Act (FATCA) filing requirement checkbox. Old box numbers 13-17 are renumbered to 14-18 respectively.
- When an extract is generated for 1099-MISC, the column mapped for box 13 now reads **Box 13 - FATCA CheckBox**.

**How and where**

To generate a MISC extract, do the following:

1. From the main menu, select **Admin > Form 1099 Extracts**.
2. Select the extract record.
3. From the extract record's screen, select **More > Generate MISC Extract**.

## Data Entry Events (DEE)

### Track refired Data Entry Events

**Previously**

On the **Data Entry Events** screen, you could not see which failed events were refired.

**Now**

On the **Data Entry Events** screen, in the event logs table, in the **Refire Status** column, you can see that an event was refired. You can also see the link to the original event.

Instance	Triggered By	Status	Refire Status
Incident #10000		Ok	Original Event Log
Incident #10000		Has Errors	Original Event Log
Incident #10000		Has Errors	Refired, Ok

On the log screen for the original event (parent), you can see the chain of all the related refired events (children).

Refire Children

Event Date	Instance	User	Status
	Incident #10000		Has Errors
	Incident #10000		Ok

**New fields**

<b>Refire Status</b>	Indicates if an event was refired, and shows the link to the original event.  The field is displayed on the <b>Recent Events Log</b> screen and the <b>Event Log</b> screen.
<b>Most Recent Refire</b>	Shows the previous refire event.  The field is displayed on the <b>Event Log</b> screen.
<b>Original Event Log</b>	If an event is refired, links to the previous event log.  The field is displayed on the <b>Event Log</b> screen.
<b>Refire Children</b>	Shows the chain of all the refired events related to the original event.  The field is displayed on the <b>Event Log</b> screen.

**How and where**

1. From the main menu, select **Admin > Data Entry Events**.
2. Select a data entry event.
3. In the **Recent Events Log** section, for a refired event, you can do the following:
  - From the **Event Date** column, select an entry for which you want to view the refired event log.
  - From the **Refire Status** column, select an **Original Event Log** entry to view the previous event log, before the refire.

The **Event Log** screen is displayed.

## Create a data entry event based on audit user assignment

### Previously

This functionality was not available.

### Now

Using the new **... is Assigned** Data Event, you can now create assignment workflow DEEs to fire immediately upon assigning the individual Questions, Categories, or Category Groups.



For an audit response to be assigned separately, you must have **Can Assign Separately** (which allows you to assign Audit Groups, Categories, and Questions to separate Users) set to true on the Audit Definition.

### New fields

**... is Assigned** in the **On Events** list

This option is available in the **Audit Answer**, **Response Category**, and **Response Category Group** Domains.

- Select **... is Assigned** to create a Data Entry Event that fires when an Audit Answer, Response Category, or Response Category Group is assigned.

### How and where

1. **Admin > Data Entry Events.**
2. Select one of these Areas: **Audit Answer**, **Audit Response Category**, or **Audit Response Category Group**.

**Data Entry Event Details**

Area: \*

On Events: \*

is Edited

is Submitted

is Assigned

Use the new "...is Assigned" option to trigger this event when an item is Assigned.

## Grant external users access to related records

### Previously

In Data Entry Events (DEE), you could only grant an external user access to the record triggering an event.

### Now

In Data Entry Events (DEE), you can also grant an external user access to the domain related to the record triggering an event.

### How and where

1. From the main menu, select **Admin**.
2. In the **Fields, Labels and Forms** section, select **Data Entry Events**.
3. Select the DEE you want to give the external user access to.
4. In the **Actions Triggered by Event** section, from the **Create a new action...** drop-down, select **Grant External Access**.
5. In the **Body** field, do the following:
  - Specify the name of the related domain you want the external user to have access to.
  - Specify the external access type you want to assign to the external user.



Below the email fields, you can find instructions on how to grant access to related domains and with specific external access type. You can also find examples of tags and filters to enter in the **Body** field.

6. Provide the relevant data.
7. Select **Save Changes**.

## Document Management

### Create an Audit Definition Template for Document Control Attestation

#### Previously

This functionality was not available.

**Now**

You can mark an Audit Definition to be used as an Audit Definition Template for Attestation of a Document Control. Once a Document Control is ready for Attestation, the Document Owner or Co-Owner can then select the correct Audit Definition Template that will be used for Attestation of the Document Control.

**New fields**

<b><i>Use as Document Attestation Template</i></b> on the <b><i>New/View Audit Definition</i></b> screen	When checked, this Audit Definition can be used as a Document Control Attestation Template, if there is at least one Attestation Question Type set up.
--	--

**How and where**

1. Edit an Audit Definition
2. Select the ***Use as Document Attestation Template*** check box.
3. Add an Audit Category and at least one Attestation Question Type.
4. Save and close.

This Audit Definition is now available to use as a Template for a Document Control.

## Use an Audit Definition Template for Document Control Attestation

**Previously**

You could only create an Attestation from Audit screens.

**Now**

Once a Document Control is ready for Attestation, the Document Owner or Co-Owner can now select the Audit Definition Template that will be used to generate the Attestation for the Document Control.

**New sections**

<b><i>Attestations</i></b> on the <b><i>View/Edit Document Control</i></b> screen	<ul style="list-style-type: none"> <li>• Use the <b><i>Create Attestation</i></b> link to select the Audit Definition Template that will be used to create a new Attestation for this Document Control.</li> <li>• You will only be able to select Audit Definition Templates that have the <b><i>Use as Document Attestation Template</i></b> field checked and include at least one Attestation Question Type.</li> </ul>
---	---

### How and where

When your Document Control has been approved, you can generate a new Audit Definition for Attestation of this Document Control based off an existing Audit Definition Template.

1. Open a Document Control that you are an Owner/Co-Owner of.
2. Select **More > Create Attestation**.

OR

In the **Attestation** section, click **Create Attestation**.

3. Select the Audit Definition Template you want to use for the Attestation of this Document Control.

Once selected, a new Audit Definition is generated, using the selected template, for the Attestation of this Document Control



If there are no Audit Definition Templates, see *Create an Audit Definition Template for Document Control Attestation* to create one.

4. You can now use the Audit Schedule, if desired, to send out the Attestation to the related Domain.

## Stack teams assigned review access in Document Controls

### Previously

When you assigned multiple teams review access, you could not stack the teams in a sequence.

### Now

When you assign multiple teams review access, you can stack the teams so that the first team in the sequence must review the policy before the policy is sent to the next team in the sequence, and so on.

### How and where

For example, to use this function in the Policy and Procedure Management (PPM) module, do the following:

1. From the main menu, select ***Policies and Procedures > Document Controls***.
2. On the ***Document Controls*** screen, select the policy you want to be reviewed.
3. In ***Review Access***, select ***Assign Team***.



You must be a document control owner to assign review access.

4. In ***Team***, select the team you want to add to the review process, and provide the relevant data.
5. If you need to assign sequential review access, in ***Next in Sequence To***, select the team that must review the policy before the policy can be assigned to the team you entered in ***Team***.
6. Select ***Assign***.

## Stack teams assigned file access in Document Controls

### Previously

When you assigned multiple teams file access, you could not stack the teams in a sequence.

### Now

When you assign multiple teams file access, the teams can be stacked so that the first team in the sequence must access the policy before the policy is sent to the next team in the sequence, and so on.



### How and where

For example, to use this function in the Policy and Procedure Management (PPM) module, do the following:

1. From the main menu, select **Policies and Procedures > Document Controls**.
2. On the **Document Controls** screen, select the policy you want to give access to.
3. In **File Access**, select **Assign Team**.



You must be a policy owner to assign file access.

4. In **Team**, select the team you want to assign policy access to, and provide the relevant data.
5. If you need to assign sequential file access, in **Next in Sequence To**, select the team that must access the policy before the policy can be accessed by the team you entered in **Team**.
6. Select **Assign**.

## Change the sequence of assigned users in Document Controls

### Previously

When you assigned a policy to a sequence of users within a team, you could not change to the order of the users in the sequence.

### Now

When you assign a policy to a sequence of users within a team, you can change the order of the users in the sequence.

### How and where

For example, to use this function in the Policy and Procedure Management (PPM) module, do the following:

1. From the main menu, select **Policies and Procedures > Document Controls**.
2. On the **Document Controls** screen, select the policy for which you want to change the sequence of assigned users.
3. In **Team Assignments**, for the user you want to reorder, in the **Reorder** column, select the arrows icon.

The screenshot shows a table titled "Team Assignments" with a "Reorder" column on the right. Each row in the table has a small icon of two arrows pointing in opposite directions, indicating the reorder function. There is also a "New Team Assignment" button in the top right corner.



The **Assignment Mode** of a team must be set to **Sequential** .

4. On the **User Assignment Order** screen, in the **Assignee** column, find the name of the user you want to reorder.
5. Next to the name of the selected user, left-click on the three dots and drag the row into the position you want the user to be in the sequence.
6. Select **Save**.

## Use Visio files in Document Controls

### Previously

In Document Controls, you could upload, view, and edit, the following files Word, Excel and PDF files.

### Now

In Document Controls, you can now also upload, view, and edit, Visio files.

**How and where**

For example, to use this function in the Policy and Procedure Management (PPM) module, do the following:

1. From the main menu, select **Policies and Procedures > Document Controls**.
2. On the **Document Controls** screen, select **New Document Control**.



3. If your organization has document types set up, on the **Select Document Control Type** screen, select the document type.



4. On the **New Document Control** screen, select **Blank**.
5. From the **Document Type** drop-down, select **Visio**, and provide the relevant data.
6. Select **Save Changes**.

## Search the content of published policies in Document Controls

**Previously**

You could not search within the content of your published policies to find specific information.

**Now**

You can search within the content of your published policies to find specific information.

**New fields**

<b>File Contents</b>	Allows you to search within the content of your published files
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If you want to use this feature, see your Origami Service Administrator to update your system settings.

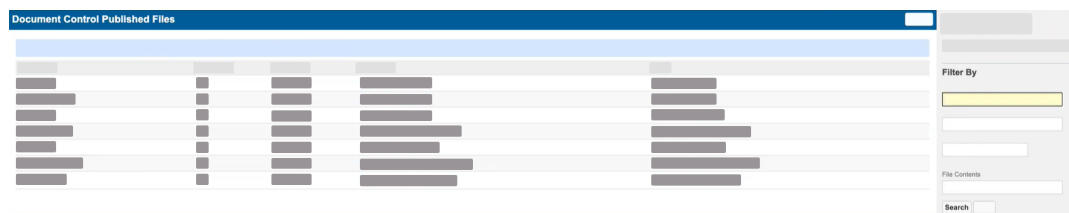
### How and where

For example, to use this function in the Policy and Procedure Management (PPM) module, do the following:

1. From the main menu, select **Policies and Procedures > Document Repository**.

The **Document Control Published Files** screen displays a list of your published policies.

2. In the **Filter By** section, in **File Contents**, enter the content you want to search for.



3. Select **Search**.

## Use advanced search when adding multiple assignees in Document Controls

### Previously

When you added multiple assignees to File Access, Review Access or Repository Access, you could not use the advanced search function.

### Now

When you add multiple assignees to File Access, Review Access or Repository Access, you can use the advanced search function for users, contacts and employees.

### How and where

For example, to use this function in the Policy and Procedure Management (PPM) module, do the following:

1. From the main menu, select ***Policies and Procedures > Document Controls***.
2. Select the policy you want to add multiple assignees to.
3. For the access type you want to add multiple assignees to, select ***Assign Multiple***.
4. Select ***User, Contact*** or ***Employee***, and select ***Next***.
5. Select ***Advanced Search***, and add the filters you want to use.
6. Select ***Apply Filter***.
7. From the filtered list, select the assignees you want to add, and select ***Next***.
8. Provide the relevant data and select ***Submit***.

## Track views and downloads of published Document Controls

### Previously

This functionality was not available.

### Now

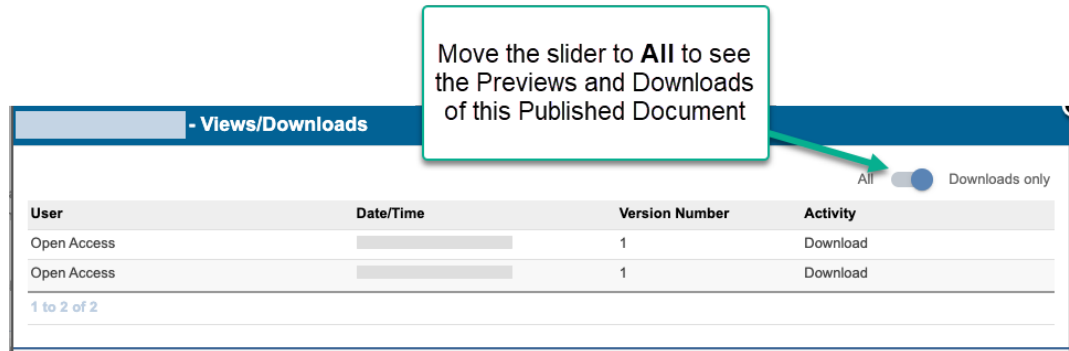
If you are the Document Controls Owner (or Co-owner), you can now see how many times the Document Control was downloaded and previewed by others.



The Previews and Downloads statistics do not include the Owner and Co-owner's downloads and previews.

**How and where**

1. Open a Published **Document Control**.
2. In the Published Files section, click **Views/Downloads**.



## Manually change the status of a Document Control

**Previously**

This functionality was not available.

**Now**

The Owner or Co-Owner of the Document Control can now manually change the status of a Document Control.

At this time, the system only automatically changes the status of a Document Control to **Published** when you publish a Document Control. You can create DEEs to automatically change the Document Control to other statuses.

**New fields**

**Status** on the **Edit Document Controls** screen

- Choices Include:
- **Editing in Progress**
  - **Approval in Progress**
  - **Expired**
  - **Archived**
  - **Approved**
  - **Published**
  - **Created**



The option: **Published** is only displayed in this list after the Document Control has been Published.

### How and where

1. Open a **Document Control** that you are an Owner/Co-Owner of.
2. From **More > Change Status**.
3. Select the new status in the **Change Status To** drop down list.

**Change Status** Save Cancel

Current Status:: Published

Change Status To::

## Document Templates

### Track views and downloads of published Document Templates

#### Previously

This functionality was not available.

#### Now

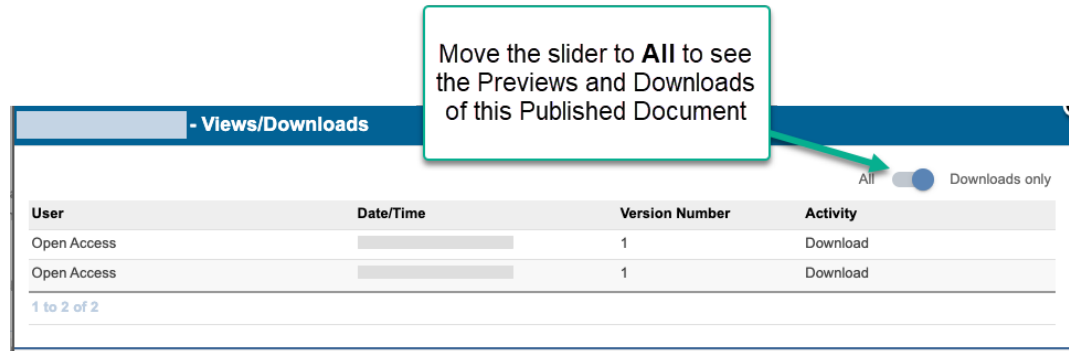
If you are the Document Template Owner (or Co-owner), you can now see how many times the Document Template was downloaded and previewed by others.



The Previews and Downloads statistics do not include the Owner and Co-owner's downloads and previews.

**How and where**

1. Open a Published **Document Template**.
2. In the **Published Files** section, click **Views/Downloads**.



## Limit editable parts of a Document Template Element

**Previously**

When you sent elements of a Document Template to assignees for review, all the content could be edited.

**Now**

When you send elements of a Document Template to assignees, you can now decide which portions can be edited by the assignees by locking the other parts within a given element.

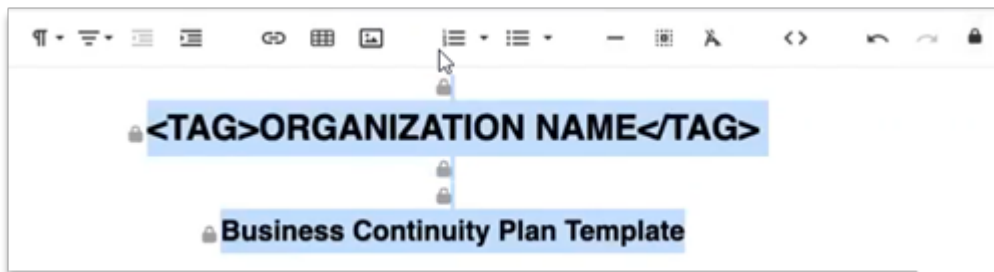


**How and where**

1. **Document Template** > select a Template in which you are an owner.
2. In the **Elements** section, open an Element.
3. Click inside one of the sections in the Element and select the items that you don't want people to edit.
4. With the items selected, click the Lock button in the toolbar.



Each line that was selected will now show a gray lock icon at the beginning. These items are now un-editable for assigned recipients.



## Environment, Health, and Safety (EHS)

### Select country of audit when importing audits from STP AuditHub

**Previously**

When importing audits from STP AuditHub, you couldn't select the country of the audit. You also had to select a state.

**Now**

You can use the **Country** field in audit definitions and on the audit import screen.

If you select US in the **Country** field on the audit import screen, an additional **State** field becomes available.

**New fields**

<b>Country</b>	Allows you to select a country for the audit import screen.
<b>State</b>	Allows you to select a state for the audit import screen.

### How and where

1. From the main menu, select **Admin > Audit Definitions**.
2. On the **All Audit Definitions** screen, select **More > Import AuditHub Template**.
3. On the **Import AuditHub Template** screen, in the **Country** field, select a value.
4. If you selected US in the **Country** field, select an additional value in the **State** field.

## Map audit category groups to STP rulebooks instead of topics

### Previously

When you imported audit data from STP AuditHub:

- Category groups were mapped to topics.
- STP rulebooks were ignored.

This led to disorganized audits with few category groups, where each STP topic was imported as a single Origami Risk category. The created groups were very large and difficult to find relevant questions in.

### Now

When you import audit data from STP AuditHub, STP rulebook mapping is used.



A topic name precedes a category group name only when topics belong to multiple category groups.

Audit category groups are now mapped to STP rulebooks, instead of STP topics, following STP three-level hierarchy:

- Audit category group
  - Audit category
    - Question
    - Question
  - Audit category
    - Question
    - Question

As a result, the large groups based on topics are divided into smaller groups based on rulebooks, so the information is more organized and identifiable.

**How and where**

1. From the main menu, select **Admin**.
2. In the **Fields, Labels and Forms** section, select **Audit Definitions**.
3. On the **All Audit Definitions** screen, select an audit to review or add a new category group for.
4. In the **Audit Category Groups** section, select **Add Audit Category Group**.

## Import Audit Definitions from STP AuditHub to include the highest possible score

**Previously**

When you imported Audit Definitions from STP AuditHub, you had to update the Audit and set the Possible Score for all Questions. Otherwise, the Possible Score would be 0.

**Now**

When you import Audit Definitions from STP AuditHub, all non-instruction questions are automatically set to the highest score available (determined in **Admin > Audit Code Set**).

**How and where**

1. From the main menu, select **Admin > Audit Definitions**.
2. On the **All Audit Definitions** screen, select **More > Import AuditHub Template**.

## Customize the selection screen for a safety meeting type

**Previously**

When creating new safety meetings (also called "safety huddles"), the selection screen for a safety meeting type could not be customized.

**Now**

On the **Custom Forms** screen, you can use XML to customize the default selection screen for a safety meeting type.

**How and where**

1. From the main menu, select **Admin**.
2. In the **Fields, Labels and Forms** section, select **Custom Forms**.
3. To create a custom selection screen for safety meeting types, in **Safety Meetings**, select **Edit/New Form**.
4. On the **Edit/New Form** screen, edit the XML as needed.
5. Select **Save Changes**.

## Governance, Risk, and Compliance (GRC)

### Select the position of an attestation question

#### Previously

When creating a new attestation question, you could not select the position of the question text.

#### Now

When creating a new attestation question, you can select the position of the question text as follows:

- *Below*
- *Hidden*
- *Above*

#### New fields

<b>Question Text Placement</b>	<ul style="list-style-type: none"><li>• <b>Above</b>: Places the question at the top of the document.</li><li>• <b>Below</b>: Places the question at the bottom of the document.</li><li>• <b>Hidden</b>: Hides the question, allowing the user to make an attestation by selecting <b>Save</b>.</li></ul>
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### How and where

1. From the main menu, select **Administration > Audit Definitions**.
2. From the list of documents, select the document you want to add an attestation question to.
3. In the document form, in the **Attestation Questions** section, select **Add New Question**.
4. In **Question Type**, from the list, select **Attestation**.
5. In **Audit Code Set**, from the list, select an audit code set for your document.
6. In **Question Text**, add the attestation question you want the user to see.
7. In **Question Text Status**, select one of the following:
  - **Above**: Places the question at the top of the document.
  - **Below**: Places the question at the bottom of the document.
  - **Hidden**: Hides the question, allowing the user to make an attestation by selecting **Save**.
8. Provide the remaining data.
9. Select **Save Changes**.

## Batch import files into Document Controls

### Previously

You could not import a batch of files into **Document Controls**.

### Now

You can use a wizard to import a batch of files into **Document Controls**. The import includes all versions of each file in the batch.

### How and where

1. From the main menu, select **Administration > Batch Processes**.
2. On the **Batch Processes** screen, select **More > Origami Document Control Import By Title**.



3. On each screen of the **Origami Document Control Import By Title** wizard, provide the relevant data.
4. Select **Save Changes**.
5. Select **Run Now**.

## Policy and Billing

### Add a security deposit for various payment options with pre- and post-bind payment support

#### Previously

This functionality was not available.

#### Now

In **Billing Profiles**, you can choose to add a security deposit for the monthly pay-as-you-go payment option.

A security deposit can be invoiced outside the application interview process. For a security deposit, a special security deposit invoice is created. You can pay for the security deposit invoice in many ways, like credit card, online payment, or check.

The security deposit is created at the member level and is linked to the policy it originated from.

**How and where**

1. From the main menu, select **Admin**.
2. In the **Policies and Underwriting** section, select **Billing Profiles**.
3. Select a billing profile where you want to configure a security deposit.
4. Select a monthly frequency payment option, for example **Monthly Pay As You Go**.
5. Define the following fields:
  - **Security Deposit Percentage**: How much percent of the entire policy is taken for a security deposit.
  - **Security Deposit Threshold**: The minimum policy value for which a security deposit is taken.
6. Select **Save Changes**.

**Default Billing Profile - Monthly Pay As You Go**

Billing Profile:	Default Billing Profile
Billing Frequency:	Monthly Pay As You Go
Initial Percentage:	<input type="text"/>
Is Down Payment: *	<input type="text" value="No"/>
Security Deposit Percentage:	<input type="text" value="10.00"/>
Security Deposit Threshold:	<input type="text" value="10,000.00"/>
Days Notice Override:	<input type="text"/>
Per Installment Fee:	<input type="text"/>

**Create rules to write off negative amounts****Previously**

You could create rules to write off only positive amounts from policies.

**Now**

You can now also create rules to write off negative amounts from policies.

**How and where**

1. From the main menu, select **Admin**.
2. In the **Policies and Underwriting** section, select **Write-Off Rules**.
3. Select **New Write-Off Rule**.
4. In the **Maximum Write-Off Threshold** field, enter the maximum negative amount of money you want to write off from a policy.

For example, if you enter  $-10.00$ , our system searches for all policies with an outstanding negative balance of 10 USD or less (up to 0), and writes off that amount from each policy.

5. Provide the remaining details, and save the rule.

## Automatically approve certain Underwriting Rules based on a User's Role

**Previously**

When you bound a proposal or manually initiated the underwriting rules, you were also required to approve every underwriting rule to bind the policy.

**Now**

Each Underwriting rule now has the option to be automatically approved based on a user's role. This allows users with specific roles to continue to bind without having to manually approve certain rules.

Example: You have a junior approver whose approval limit is 2 million dollars, whereas the senior approver's limit is set to 4 million dollars. Previously, every time a senior approver bound a proposal, they also needed to approve the Underwriting Rules for the junior approvers. Now, you can auto-approve all junior approver rules for every user with the senior approver role.

**New fields**

On the **New/Edit Underwriting Rule** screen, in the new **Override Rules** section.

<b>Roles that can override</b>	Select all User Roles that will have this Underwriting Rule automatically selected and approved.
<b>Auto Approve for Override Roles</b>	<p><b>Yes:</b> The Underwriting Rule is pre-checked and approved for the selected Roles in the <b>Roles that can override</b> field. All users will still see the rule.</p> <p><b>No:</b> The underwriting rule will need to be manually checked by all Users before they can bind the proposal.</p>



### How and where

- **Admin > Underwriting Rules > New Underwriting Rule**

## Add Relationship Validation to an Underwriting Rule

### Previously

Underwriting rules could not validate if a Schedule had the required amount of a particular child record before it was bound.

A child record is, for example, the work location for an additional insured.

### Now

You can now add a Relationship Validation to an Underwriting rule that scans all child records under a specific Parent Record of the Schedule. If the Parent Record does not have an amount between the minimum and maximum range of a specific child record, the proposal will not bind and an underwriting exception will be thrown.

For example, the Underwriting Rule requires an additional insured to have at least one work location. If there are no work locations added to an additional insured, the Proposal will not bind.

### New sections

<b>Relationship Validation</b>	On the Edit Underwriting screen. (This section is not displayed when you first create the Underwriting Rule.)
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### How and where

1. From the main menu, select **Admin > Underwriting Rules**.
2. Open an existing Underwriting Rule.
3. In the new **Relationship Validation** section, select the **New Relationship Validation** button.

The **New Relationship Validation** screen is displayed.

4. Select the Parent domain and the child domain combination that needs to be validated.
5. Add the minimum and maximum range amount needed to allow the proposal to bind.
6. Select **Save Changes**.

## Root Cause Analysis (RCA)

### Add new RCA Types

#### Previously

This functionality was not available.

#### Now

You can now add RCA types directly to the Code Table or add a new RCA Type when creating an RCA Record. The system will automatically create a new custom form for each new RCA Type.

#### How and where

##### To add RCA Codes:

- **Admin > Code Tables > Root Cause Types**
  - When you create a new Root Cause Type, the system automatically creates a new custom form named the same as the new Root Cause Type.
  - The new form will be identical to the New RCA screen until you modify it to suit your needs.

##### To edit an RCA custom form:

- **Admin > Custom Forms** > search for the RCAs section

##### To create a new RCA record using an RCA Code Type:

- From the RCA section, select **New RCA**.
  - If there are RCA Types setup in your system: the **Select New Root Cause Type** screen will be displayed. You can now select the Root Cause Type.
  - There are no RCA Types setup in your system: You will go directly to the **New RCA** screen.

### Give a root cause domain a custom name throughout Origami Risk

#### Previously

You could not rename any of the RCA Domains.

**Now**

You can now use Domain Name Overrides to rename the following RCA Domains, so they display as different names throughout the system:

- RootCauses
- RootCauseCodes
- RCATimelines
- RCAContributingFactors
- RCAContributingFactorTypes
- RCAPatientTypes
- RCAStatusCodes
- RCASeverityCodes
- RCAServicesCodes
- RCAFollowUpActionCodes
- RCAInvolvedFactorsCodes

**How and where**

1. **Admin > Domain Name Overrides > select *New Domain Name Override*.**
2. From the **Domain** drop-down field, select the domain you want to rename in the system.
3. In the **Display Name Singular** field, enter the new singular version of the Display name.
4. In the **Display Name Plural** field, enter the new plural version of the Display name.
5. Click **Save Changes**.

## Use custom employee fields in the RCA Domain

**Previously**

This functionality was not available.

**Now**

15 custom **Employee** fields are now available in the RCA Domain.

These fields are named: **Employee1, Employee2, Employee3, ... , Employee14, Employee15**.

**How and where**

For RCA Domains, add fields to your Forms:

- **Admin > Custom Forms**

## Create a root cause with a DEE for incidents or claims

### Previously

This functionality was not available.

### Now

You can now create a new Root Cause using a DEE for Incidents or Claims.

### How and where

1. **Admin > Data Entry Events > New Data Entry Event.**
2. Select **Incident** or **Claim** as the **Event Area**.
3. On the **New Data Entry Event** screen, fill out the information, then click **Save Changes**.
4. On the **Data Entry Event Details** screen, in the **Action Triggered by Event** section, from the **Create a new Action** drop list, select **New Root Cause**.
5. On the **New Action** screen, select the Auto Fill Mapping Set, if available.
  - If you have Auto Fill Mapping Sets created for RCA and Incidents/Claims, you can use these mapping sets to auto-fill specific fields on the new Root Cause record from the source domain record.
  - If you do NOT have any Auto Fill Mapping sets created for RCA and Incidents/Claims, a blank Root Cause Record will be created and linked to the Incident/Claim with no other data from the Incident/Claim.

### **Send Email Notification**

- To use the Email Notification option, you will need to have a Root Cause Email Template (Attached to the Root Cause domain). Once you select this option, you will be prompted to select an Email Template.
- If you do NOT have any Root Cause Email Templates created, select **New Email Template** to create one.

### **Create External Access** (available when you select **Send Email Notification**)

- When selected, an External Access Key is created for the newly created Root Cause Record.
- You can select when you want this Access Key revoked.
- This will also replace any links to the record in the Email template with external access URLs.



**Create External Access** only shows if you have at least one External Access Type configured for the RCA domain.

## Add Days Open tracking to the RootCauses and RCACorrectiveActions domains

### Previously

Users couldn't track the progress of ongoing root cause analyses (RCAs) and corrective actions (CAs).

### Now

You can track open RCAs and CAs. You can select **RCAs** and **RCA Corrective Actions** from the list of domains in the **Days Open Rules** section in the Administration module. When custom digits-only number fields are defined for the domains, you can create up to two Days Open rules for the root causes and corrective actions domains.

Tracking open RCAs and CAs can be useful, for example, if you want to do the following:

- Check how quickly open RCAs or CAs are resolved
- Identify bottlenecks in your departments

### How and where

1. From the main menu, select **Admin**
2. In the **Fields, Labels and Forms** section, select **Days Open Rules**.
3. Select **New Days Open Rule**.

## Assign a root cause analysis to a team

### Previously

You could not assign a root cause analysis (RCA) to a team.

### Now

You can assign a root cause analysis (RCA) to a team to allow more than one person to participate in an analysis.

### How and where

1. From the main menu, select **Root Causes**.
2. On the **RCAs** screen, select the RCA for which you want to add a team.
3. In the **Team Assignments** section, select **New Team Assignment**.
4. On the **Team Assignment for RCA** screen, provide the relevant data.
5. Select **Assign**.

## Reporting and Analytics

### Add expiration date for downloading scheduled reports

#### Previously

For scheduled reports sent by email, the download link expires automatically after seven days. (This can still be true.)

#### Now

When this option is activated, you can specify the number of days after which the download link expires.

Apart from the download link, the email also contains a sentence informing about the date on which the download link expires.



If you want to use this feature, see your Origami Service Administrator to update your system settings.

## Reporting and Analytics

### Schedule Dashboard PDF exports to include interactive options

#### Previously

Interactive options were not included in scheduled PDF exports of a dashboard.

#### Now

You can include interactive options when scheduling a PDF export of a dashboard.

## How and where

When creating a new schedule:

- In the **Filter Options** section, select **Apply Interactive Filter to Schedule**.

Next to **Filter to Apply**, you can see which interactive option is included in the scheduled PDF export.



If you want to include a different interactive option, you need to apply it on the dashboard first.

## To create a new schedule:

1. From the main menu, select **Dashboards > More > More Dashboards**.
2. From the list, select the dashboard you want to share.
3. Select **More > Add Schedule**.
4. Provide the relevant data, for example, the frequency of sending, the recipient, and the body of the email.
5. Save the changes.

Your email is ready, and you can find it in **Dashboards > More > View Schedule**.

# Claims

## Select a Risk Unit on the Loss Event form

### Previously

When a Policy Snapshot was imported, you had to add a risk unit on the first notice of loss, when sometimes you didn't have this information at that time.

### Now

You can now select the risk unit on the loss event form.

### New fields

<b>Risk Unit</b>	
	Shows information on the selected risk unit. The following buttons are available: <ul style="list-style-type: none"><li>• <b>Add Risk Unit</b>: Allows you to add a risk unit on the loss event form.</li><li>• <b>Change</b>: Allows you to change a risk unit on the loss event form.</li><li>• <b>Remove</b>: Allows you to remove a risk unit from the loss event form.</li></ul>

## How and where

### To add a risk unit:

1. From the main menu, select **Claims and Incidents > All Loss Events**.
2. From the list, select the loss event you want to add a risk unit to.
3. Select **Edit Event**.
4. From the **Risk Unit** field, select **Add Risk Unit**.
5. Select the required risk unit.

The information on the risk unit is added to the loss event form.

### To choose another risk unit:

- If you want to select another risk unit from the loss event form, from the **Risk Unit** field, select **Change Risk Unit**.

### To remove a risk unit:

- If you want to remove the risk unit from the loss event form, from the **Risk Unit** field, select **Remove Risk Unit**.

## Display all electronic data interchange rejection errors in a report

### Previously

To view electronic data interchange (EDI) rejection errors for a claim, you had to select **View Acknowledgment** in the claim record, and manually extract the rejection error details from the XML.

### Now

- You can see all the claims that have EDI rejection errors displayed in one report.
- From the report, you can select a claim to see all the EDI rejection errors for that claim.

## How and where

1. From the main menu, select **Claims & Incidents > EDI Reports**.
2. On the **EDI Reports** screen, select **Rejected EDI Reports**.
3. Select a claim to see all the EDI rejection errors for that claim.



# Environment, Health, and Safety (EHS)

## Chemicals

### Import chemical concentrations in the Data Import Center

#### Previously

This functionality was not available.

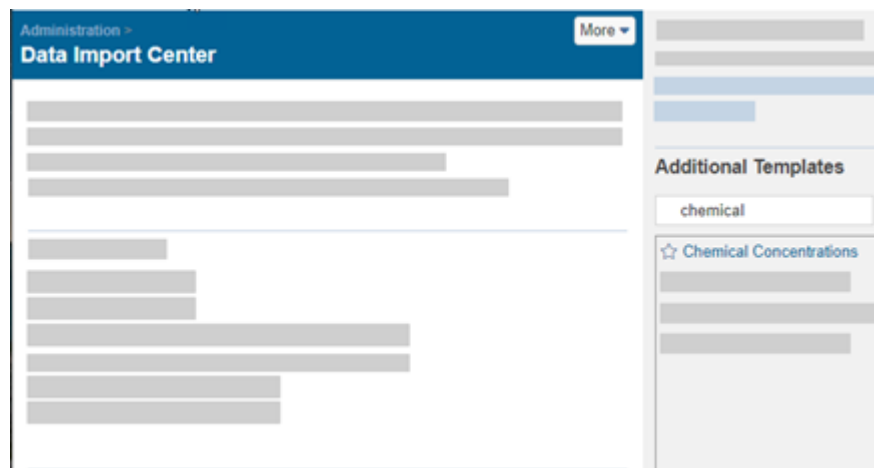
#### Now

You can now import Chemical Concentrations using the **Chemical Concentrations** template.

#### How and where

**Admin > Data Import Center**

The new **Chemical Concentrations** template has been added to the **Additional Templates** menu.



### Export chemicals to CSV or PDF

#### Previously

You could only export chemicals to a CSV file.

#### Now

You can now export chemicals also to an Excel or a PDF file.

## How and where

### To export a list of chemicals:

1. From the main menu, select **Chemicals**.
2. Select **More**, and then select one of the following:
  - **Export to CSV**
  - **Export to Excel**
  - **Export to PDF**

## Enter partial inventory values

### Previously

For the inventory items and transaction values, you could only enter quantities in whole numbers.

### Now

You can now enter quantities with up to two decimal places.

### How and where

You can enter a partial inventory value:

- In the **Quantity** field on the **Inventory Items** screen.
- In the **Change** field on the **Inventory Transactions** screen.

Open an inventory item and scroll down to the **Inventory Transaction** section.

## Governance, Risk, and Compliance (GRC)

### Policy and Procedure Management (PPM)

PPM uses **Document Controls** functionality.

## Create a policy from a template or a blank document

### Previously

The only way to create a new policy was to upload a file from your computer.

### Now

When you create a new policy, you can select a pre-loaded template file or a blank document.

### New fields

<b>Template</b>	Allows you to select a pre-loaded template.
<b>Blank</b>	Allows you to select a blank document.

### How and where

1. From the main menu, select **Policies and Procedures > Document Controls**.
2. On the **Document Controls** screen, select **New Document Control**.



3. If your organization has document types set up, on the **Select Document Control Type** screen, select the document type.



4. On the **New Document Control** screen, select one of the following:
  - **Template**: Creates a policy from a template.
  - **Blank**: Creates a policy from a blank document.
5. Depending on your answer in the previous step, do one of the following:
  - If you selected **Template**, select a document from the list of uploaded templates, and provide the relevant data.
  - If you selected **Blank**, select the document type, and provide the relevant data.
6. Select **Save Changes**.

## Change the order sequence of team members

### Previously

The only way to re-sequence Team Members was to open each Team Member's record and assign a sequence manually.

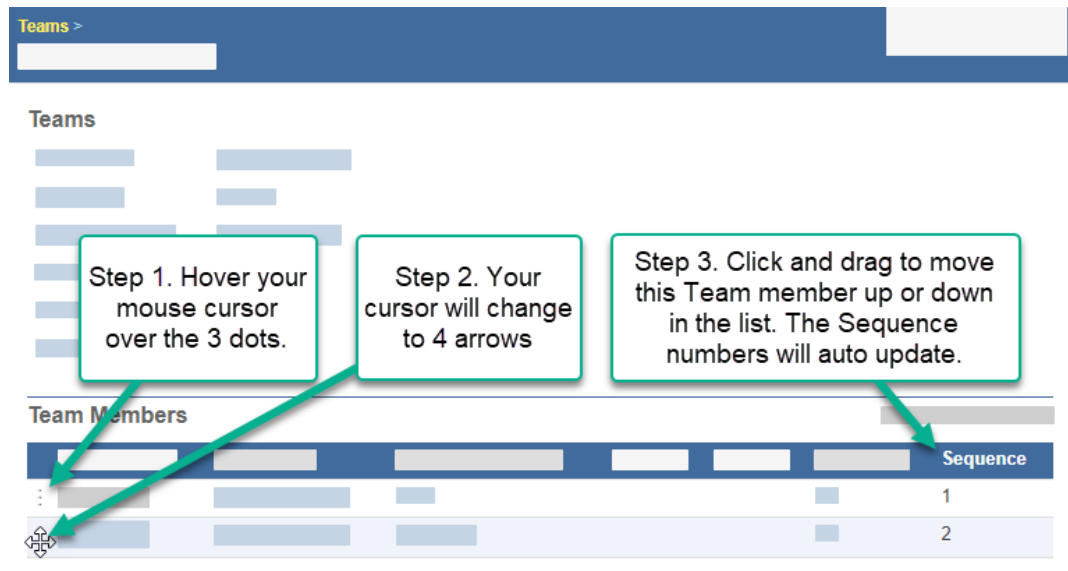
### Now

When a Team Member is added to a Team (regardless of the Maintenance Mode), the system automatically gives the member the next number in the sequence (starting with 1). You can also re-sequence members through drag and drop.

### How and where

1. **Teams** > Open a **Team**.
2. In the Team Members list, hover your mouse cursor over the 3-dot icon.  
The cursor will change to 4 arrows.
3. Drag and drop the member to the new position in the list.

The system automatically updates the sequence order for all Team Members.



## Get a notification when publishing an unreviewed policy

### Previously

When you selected **Publish**, you were not warned if a policy was unapproved, or contained tracked changes.

### Now

When you select **Publish**, if a policy is unapproved, or contains tracked changes, our system warns you and asks if you want to publish anyway.

## How and where



To publish a policy, you must be the policy owner.

1. From the main menu, select ***Policies and Procedures > Document Controls***.
2. On the ***Document Controls*** screen, select the title of the policy you want to publish.
3. Select ***Publish***.



A warning displays if the policy contains pending changes, or comments that are not yet approved.

## Give a named user direct access to a policy

### Previously

In the Document Controls module, a published policy could only be accessed from an Origami Risk repository.

### Now

In the Document Controls module, you can give a named user direct access to download the most recent version of a published policy.

### How and where



You need to configure a data entry event to send an email with the download link to the named user. Such a link is also useful to link back to the policy from other areas in Origami.

1. From the main menu, select **Policies and Procedures > Document Controls**.
2. Select the policy for which you want to give access to a named user.
3. In **Download Access**, select **New User Assignment**.
4. In **Assignee Type**, select **Named User**.
5. In **User**, enter the name of the user you want to give access to the policy.
6. In **PDF File**, select one of the following:
  - **Yes**: Gives access to a PDF version of the policy document.
  - **No**: Gives access to the original format of the document, for example, a Word document.



Most modern browsers open PDF documents in a new tab instead of downloading them directly.

7. Select **Assign**.

## Give an external user direct access to a policy

### Previously

In the Document Controls module, a published policy could only be accessed from an Origami Risk repository.

### Now

In the Document Controls module, you can give an external user a link to the most recent version of a published policy so the policy can be directly accessed from an external web page or intranet site.

### How and where



You need to configure a data entry event to send an email with the download link to the named user.

1. From the main menu, select **Policies and Procedures > Document Controls**.
2. Select the policy for which you want to give access to an external user.
3. In **Download Access**, select **New User Assignment**.
4. In **Assignee Type**, select **External Assignee**.
5. In **User Email**, enter the email address of the external assignee.
6. In **PDF File**, select one of the following:
  - **Yes**: Gives access to a PDF version of the policy document in a browser.
  - **No**: Gives access to the original format of the document, for example, a Word document.
7. Select **Assign**.

## View repository links within a box

### Previously

When you viewed an open access document in Document Templates, long URL links to a repository crossed into the right panel of the screen.

### Now

When you view an open access document in Document Templates, the URL links are contained within a box.

## Healthcare

### Calculate risk priority scores for HFMEA processes

#### Previously

For HFMEA (Healthcare Failure Mode and Effect Analysis) hazard analysis, our system used the VA (Veterans Affairs) methodology.

**Now**

For HFMEA hazard analysis, our system uses both the VA (Veterans Affairs) methodology and the IHI (Institute for Healthcare Improvement) methodology.

In the IHI process, with severity, occurrence, and detection scores, you can now provide values from 1 to 10. The risk priority score is calculated automatically.

## Give an HFMEA domain a custom name throughout Origami Risk

**Previously**

You could not rename any of the HFMEA Domains.

**Now**

You can now use Domain Name Overrides to rename the following HFMEA Domains, so they display as different names throughout the system:

- HFMEAEffects
- HFMEAProcesses
- HFMEAStatusCodes
- HFMEAActions
- HFMEAFailureModes
- HFMEAREcords

**How and where**

1. Select **Admin > Domain Name Overrides > New Domain Name Override**.
2. From the **Domain** drop-down field, select the domain you want to rename in the system.
3. In the **Display Name Singular** field, enter the new singular version of the Display name.
4. In the **Display Name Plural** field, enter the new plural version of the Display name.
5. Select **Save Changes**.

## Policy and Billing

### Rollback and re-run bind data updaters

**Previously**

This functionality was not available.



**Now**

When a Proposal is successfully bound, but there is an error in the post-bind Data Updaters:

1. You will see an error on both the Proposal and Policy Record. (This is still the same.)
2. Now, all the previously run Data Updaters are rolled back.
3. You can now re-run the Data Updaters from the Policy's **More > Rerun Data Updaters** (after the reason for the failure has been corrected.)

This option is only available when an error has aborted the post bind execution. Once the rerun is executed without any errors, the option will no longer be available.

## Bulk bind proposals

**Previously**

When you use the db.api method: `BindProposal ctx.Util.BindProposal (proposal proposal)`, you can only bind one proposal at a time. (This is still true)

**Now**

A new db.api method `BulkBindProposal` allows you to bulk bind a group of proposals from within a Rating Program.



“Help on Script Actions” ([.../Origami/Actions/ScriptActionHelp](#)) has been updated to include this Method/Function.

**New methods and functions**

```
void ctx.Util.BulkBindProposal  
(int policySetID, int[]  
proposalIDs)
```

This will queue a list of `proposalIDs` to be bound on the app server.

Only accepted proposals can be bound with this method.

Parameters:

- `policySetID`: The selected Rating Program for the bulk operation
- `proposalIDs`: The list of proposal IDs to bind (must be in the specified Rating Program)

## Re-run ‘Forms Auto Generation’ after a proposal post-bind failure

**Previously**

This functionality was not available.

**Now**

When a Proposal is successfully bound, but the Forms Auto Generation fails:

- You will now see an error on both the Proposal and Policy screens with details of the failure.
- You can then re-run the Forms Generation from the Policy's **More > Rerun Forms Generation**. (After all errors have been corrected.)

This option is only available when the Auto Forms Generation during Bind failed. Once the re-run is executed without any errors, the option will no longer be available.

## View the 'Net of Commission' on agency-billed policies

**Previously**

This functionality was not available.

**Now**

You can now see the Net of Commission in the **Premium Invoices** section of an Agency-Billed Policy. This column is only available for Agency Billed policies.

How Net of Commission is calculated and updated:

- Net of Commission = Gross Amount - Commission Payable to Broker 1 (Broker 2 commission, if available is still included in the Net of Commission)
- For Invoiced Premium commission basis, the Net of Commission is calculated for each policy invoice.
- For Written Premium commission basis, the Net of Commission is updated on the first invoice.



For any Endorsement or cancellation which changes the original commission, the changed commission amount is reflected on the next pending invoice or in the new invoice created by this endorsement or cancellation transaction.

**How and where**

1. Open an Agency-Billed Policy.
2. Scroll down to the **Premium Invoices** section.

## Use net of commission for agency billing on invoiced and written premiums

### Previously

Agency billing included the commission portion in the agency statement. As a result, the commission portion had to be manually accounted for when a payment was allocated to the statement.

### Now

When this option is activated, Agency billing will use 'Net of Commission'.

Agency statements will now generate as 'Net of Commission.' This means that the commission of the primary agency/broker is subtracted from the statement. The commission for the second agency or broker (if available) is included in the net of commission.

When entering a payment on an Agency Bill, you only need to enter the net payment. The system will no longer use Commission Retained when allocating payment to the invoice(s).

### New fields

<p><b>Net of Commission</b> on the <b>Agency Invoice</b> screen, <b>Allocate Payments</b> screen, and Policy Billing.</p>	<ul style="list-style-type: none"> <li>The <b>Net of Commission</b> shows the premium amount minus the commission.</li> </ul>
---	---

### Updated fields

<p><b>Paid Amount</b> on the <b>New Agency Transaction</b> screen.</p>	<ul style="list-style-type: none"> <li>The field is now the <b>Net of Commission</b>.</li> <li>Enter the Net Paid amount in this field.</li> </ul>
--	--

### Removed fields

<p><b>Commission Retained</b> on the <b>New Agency Transaction</b> screen.</p>	<ul style="list-style-type: none"> <li>Commission retained is no longer being used when calculating Agency Billing.</li> </ul>
--	--

**How and where**

When this option is activated, the agency statements will start excluding the commission portion.

1. When a policy is bound, it creates a payment schedule (based on the existing setup) on the **Policy Billing** screen.

Transaction Date	Due Date	Insured	Policy Number	Start	End	Type	Bill Status	Billed Amount	Outstanding
							Bill Submitted	300.00	300.00

2. The policy invoice is added to the **Agency Invoice** screen and the Agency Statement.
  - The new field: **Net of Commission** is now displayed on the **Agency Invoice** screen (in the Invoice Policy Summary and Invoice Transactions sections) and also on the Policy statement. This new field shows the premium amount minus the commission.

Policy Number	Insured	Effective Date	Expiry Date	Gross Amount	Net of Commission	Outstanding
				300.00	240.00	

Transaction Date	Insured	Policy Number	Start	End	Gross Amount	Net Of Commission	Outstanding
					300.00	240.00	

3. Once the statement is generated, the system assumes the commission has been paid. A new commission payment record is now added on the **Policy Billing** screen so that policy outstanding is in sync with agency outstanding.

Transaction Date	Due Date	Insured	Policy Number	Type	Bill Status	Paid Amount	Unallocated	Outstanding
				Bill	Invoiced	300.00		240.00
			133	Payment		60.00	0.00	0.00

- When it's time to add the agency payment on the **New Agency Transaction** screen, the 'Paid Amount' is now the 'net of commission'. Enter the Net Paid amount in this field.

**New Agency Transaction**

**Payment Details**

\_\_\_\_\_


\_\_\_\_\_

Paid Amount

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

 The **Commission Retained** field has been removed, since it is no longer needed when allocating payment.

- On the **Allocate Payments** screen, you will now see the new **Net of Commission** field. In order to complete the allocation, the paid amount must be fully allocated to one or more line items.

**Allocate Payments**


The agency payment needs to be allocated to invoices.

Invoice #	Invoiced	Policy #	Transaction Date	Start	End	Due Date	Gross Amount	Net Of Commission	Amount Due	Allocate Amount
43							300.00	240.00	240.00	240.00

- After the payment is allocated, the system adds a new payment record to the **Policy Billing** screen that shows the allocated payment amount.

**Policy Billing**

Transaction Date	Due Date	Invoiced	Policy Number	Start	End	Type	Bill Status	Invoice Number	Billed Amount	Paid Amount	Unallocated	Credit/Balance	Refunded Amount	Outstanding
12/10/2022	12/31/2022	AD Landscaping Company	130	10/1/2022	12/31/2022	Bill	Invoiced	43	300.00	0.00	0.00			0.00
12/10/2022		AD Landscaping Company	130			Payment			0.00	240.00	0.00			0.00
12/10/2022		AD Landscaping Company	130			Payment				240.00	0.00			0.00
04/01/2023	01/15/2023	AD Landscaping Company	130	01/01/2023	03/31/2023	Bill	Pending		300.00	0.00	0.00			300.00
04/01/2023	04/15/2023	AD Landscaping Company	130	04/01/2023	06/30/2023	Bill	Pending		300.00	0.00	0.00			300.00
07/01/2023	07/15/2023	AD Landscaping Company	130	07/01/2023	09/30/2023	Bill	Pending		300.00	0.00	0.00			300.00

 If you want to use this feature, see your Origami Service Administrator to update your system settings.

## Handle Commission for existing invoices after Policy Billing has been switched to 'Net Of Commission'

### Previously

This functionality was not available.

**Now**

If your system's Policy Billing is 'Net of Commission' you only need to enter the net payment on the **New Agency Transaction** screen. (See the section: **Agency Statement and Agency Payment can now be 'Net of Commission' on invoiced and written premium**) since Commission Retained is no longer needed, this temporary process allows you to handle the outstanding Agency Statements that still have commission retained.

This feature allows existing pending statements to be paid using the previous workflow while new statements will use the new net of commission (NOC) workflow.

**Field changes**

"Commission Retained" on the **New Agency Transaction** screen and **Allocate Payments** screen

On the **New Agency Transaction** screen

- This field will only be displayed when you have existing unpaid agency statement transactions.
- This field will be hidden for all newly created agency statement transactions.


On the **Allocate Payments** screen

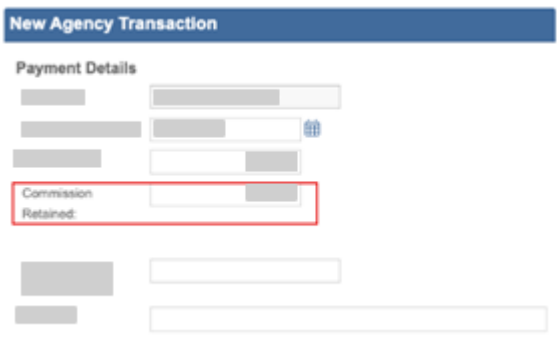
- This field will be displayed in the header only when allocating to existing agency statement.
- For new agency statements or when allocating to mix of existing and new statements, this field will no longer be displayed.

**How and where**

The following temporary process only applies when your system’s Agency Billing is ‘Net of Commission’(NOC) and you have existing unpaid agency statement transactions that have Commission Retained.


1. When paying an existing agency statement (after switching to NOC) you can enter the commission retained on the **New Agency Transaction** screen.

 You will not see the **Commission Retained** field when adding a payment on new agency statements generated after switching to NOC.



The screenshot shows the 'New Agency Transaction' form with a 'Payment Details' section. The 'Commission Retained' field is highlighted with a red box.

2. The **Allocate Payments** screen will work the same for the existing agency statements as prior to switching to NOC.

 When there are no transactions with commission retained left, you will no longer see the **Commission Retained** field..



The screenshot shows the 'Allocate Payments' table with a 'Commission Retained' column header highlighted by a red box.

Invoice #	Insured	Policy #	Transaction Date	Start	End	Due Date	Gross Amount	Net Of Commission	Amount Due	Allocate Amount

To view the process for new Agency Statements after NOC has been enabled, see the section: **Agency Statement and Agency Payment can now be ‘Net of Commission’ on invoiced and written premium.**

When a Payment is initiated at the Agency level, then there are transactions with and without Commission Retained.

On the **Allocation Payments** screen:

- If an amount is entered in the **Commission Retained** field, the system will only show the existing, unpaid Agency Statements that included Commission Retained.

- If the **Commission Retained** field is left blank, the system will show all statements (with and without Commission Retained). When allocating a payment to existing invoices, the system will:
  - First, allocate the commission portion of the invoice.
  - Then, allocate the remaining amount to the premium outstanding.

## Remove proposal coverages from proposal view

### Previously

On the **Add/Edit Proposal Coverages** screen, you could not remove individual coverages from a proposal. The check boxes for added coverages were grayed-out.

### Now

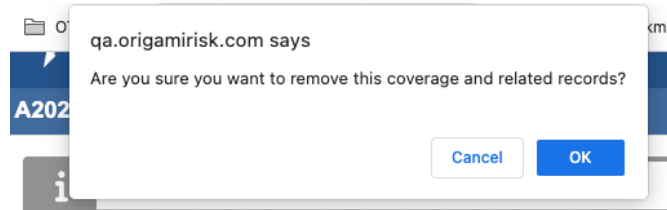
On the **Add/Edit Proposal Coverages** screen, you can now remove a coverage from a proposal.



### How and where

- To remove a coverage from a proposal, on the **Add/Edit Proposal Coverages** screen, clear a relevant check box.

When you remove a coverage, you get a warning message saying that any existing child records and associated schedules will also be deleted.



**Auto Liability**

**Coverage Details**

Coverage: Auto Liability

Effective Date: \* 12/20/2022

Expiry Date: \* 12/20/2023

Tail Date:

Retro Date:

Loan Amount:

State Dependency: - None Selected -

**Contribution**

Base Contribution:

County Rate ⓘ

UW Mod:

**Auto Physical Damage**

**Coverage Details**

Coverage: Auto Physical Damage

Effective Date: \* 12/20/2022

Expiry Date: \* 12/20/2023

Tail Date:

Retro Date:

## Close invoices on an Agency Statement for flat-cancelled policies

### **Previously**

If you bound a policy and then received a flat-cancel endorsement after the Agency Statement was created, there was no way to close out the corresponding invoice on the Agency statement.

**Now**

You can now close the flat-cancelled policy by entering a 0 USD amount in the `AllocateAgencyPaymentToPolicy` method, to reconcile negative and positive transactions and close out the flat-cancelled invoice.



“Help on Script Actions” ([.../Origami/Actions/ScriptActionHelp](#)) has been updated to include this Method/Function.

**Updated methods and functions**

`AllocateAgencyPaymentToPolicy`

Allocates a payment to a policy. The allocation is done in a sequence starting from the invoice with the earliest due date.

If a policy has 0 USD outstanding, the payment amount is held at the policy level and is identified as an unallocated payment. This payment can be used to pay off another agency invoice.

When a 0 USD payment is passed, the system attempts to close out two or more invoices which have the total value of 0 USD. For example, the system would close an invoice of -100 USD and an invoice of 100 USD.

**Parameters:**

- `agencyPayment`: The agency payment to be allocated.
- `policyID`: The identifier of the policy to which the agency payment must be allocated.
- `consumePolicyOverPayments`: When set to **true**, policy payments with unallocated balance are refunded and added to the agency payment amount.

This method is used after

`AllocateAgencyPaymentToPolicyExact`.

**How and where**

For the system to automatically pick up invoices to be closed, you need to provide the following:

- The 0 USD amount to be allocated.
- The policy ID.

## Override billed premium at the Policy and Coverage level

**Previously**

This functionality was not available.

**Now**

You can now override billed premium at the Policy and Coverage levels. When a proposal has been rated (and still "unbound"), a new option **More > Premium Override** will be available.

**New screens**

<b><i>Premium Override</i></b>	Accessible from the <b><i>View Proposal</i></b> screen.
--------------------------------	---

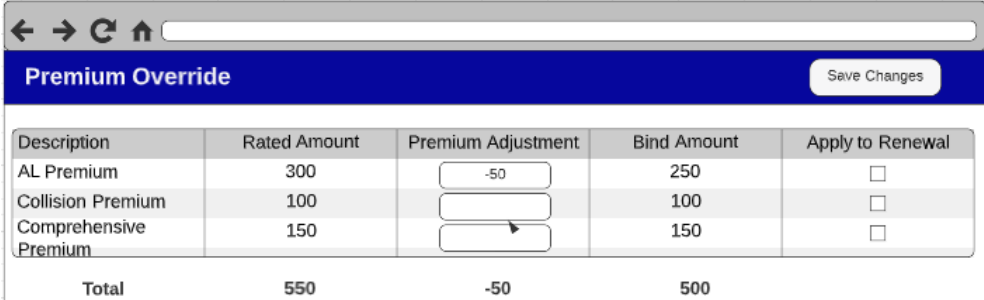
**New fields**

<b><i>Allow Premium Override</i></b> on the <b><i>Add/Edit Rating Program</i></b> screen	Use this field to enable Premium Override functionality for this Rating Program.
--	--

## How and where

### For New Business

1. Create a new Proposal.
2. Run the rating to calculate the premium. (You can manually do this from the More menu.)
3. Select **More > Premium Override**.
  - The Premium Override screen is displayed. This screen lists all the rated premium line items of the proposal with the rated premium amount.
  - Edit the Premium Adjustment amounts, as needed, with positive or negative numbers for each line item.



Description	Rated Amount	Premium Adjustment	Bind Amount	Apply to Renewal
AL Premium	300	-50	250	<input type="checkbox"/>
Collision Premium	100		100	<input type="checkbox"/>
Comprehensive Premium	150		150	<input type="checkbox"/>
<b>Total</b>	<b>550</b>	<b>-50</b>	<b>500</b>	

In the screenshot above, they entered -50 for AL Premium to reduce the rated Premium from 300 to 250.

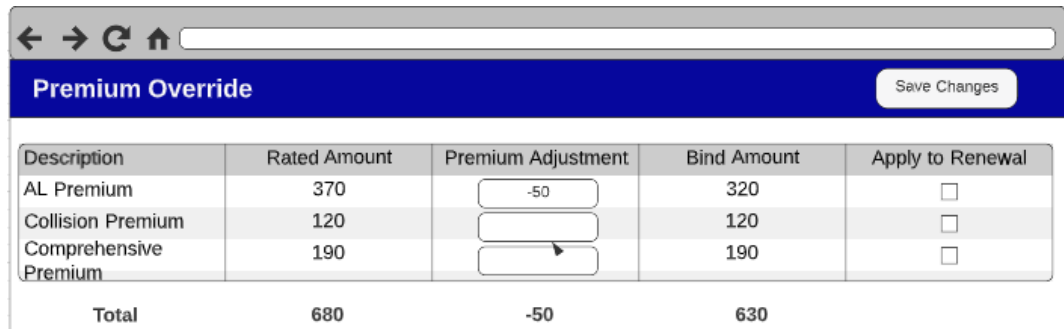
- **Premium Adjustment** will not be prorated since it is not an interim update.
  - If **Apply to Renewal** is not selected, then all the adjustments for the line item will carry forward.
  - When finished, click **Save**.
4. After saving, the system will run the rating to account for the new adjustment amount.
  5. When finished, click **Bind Proposal**.

### For Endorsements

1. Open the Policy.
2. Select **More > Create Endorsement**.
3. After the endorsement details and rating are complete, select **More > Premium Override** and update the coverage amount.

When you close the Premium Override, the rating will run automatically to account for the new adjustment amount.

- To see if there are any existing Premium Overrides, select **More > Premium Override**.



Description	Rated Amount	Premium Adjustment	Bind Amount	Apply to Renewal
AL Premium	370	-50	320	<input type="checkbox"/>
Collision Premium	120		120	<input type="checkbox"/>
Comprehensive Premium	190		190	<input type="checkbox"/>
<b>Total</b>	<b>680</b>	<b>-50</b>	<b>630</b>	

- When you first enter this screen, you may see overrides in the Premium Adjustments fields that were made previously at the Endorsement level.
  - You can make changes to these Premium Overrides, as needed, to adjust the Endorsement Premium. For example, you can enter -50 for AL Premium to reduce the rated Premium from 370 to 320.
  - **Save**
- After saving, the system will run the rating to account for the adjustment amount.
  - When finished, click **Bind Proposal**.
  - After you bind the Proposal, the Bind Amount at the Policy level will reflect that change.

## Allocate a payment to a policy when the outstanding amount is 0 USD

### Previously

You could not allocate a payment to a policy when the outstanding amount was 0 USD. The payment was not processed by the system.

**Now**

With the `AllocateAgencyPaymentToPolicy` and `AllocateAgencyPaymentToPolicyExact` methods, you can now allocate a payment to a policy when the outstanding amount is 0 USD.



“Help on Script Actions” ([.../Origami/Actions/ScriptActionHelp](#)) has been updated to include this Method/Function.

**Updated methods and functions**

`AllocateAgencyPaymentToPolicy`

Allocates a payment to a policy. The allocation is done in a sequence starting from the invoice with the earliest due date.

If a policy has 0 USD outstanding, the payment amount is held at the policy level and is identified as an unallocated payment. This payment can be used to pay off another agency invoice.

When a 0 USD payment is passed, the system attempts to close out two or more invoices which have the total value of 0 USD. For example, the system would close an invoice of -100 USD and an invoice of 100 USD.

**Parameters:**

- `agencyPayment`: The agency payment to be allocated.
- `policyID`: The identifier of the policy to which the agency payment must be allocated.
- `consumePolicyOverPayments`: When set to **true**, policy payments with unallocated balance are refunded and added to the agency payment amount.

This method is used after

`AllocateAgencyPaymentToPolicyExact`.

**New methods and functions**

```
AllocateAgencyPaymentToPolicyExact
```

Allocates a payment to a policy if the following conditions are met:

1. The system checks, if the payment to be allocated matches the total outstanding value of the policy.  
If the values match, the payment is allocated to the outstanding invoices.
2. If the total outstanding value of the policy doesn't match the payment amount, the system tries to find an invoice in the policy that exactly matches the payment amount.  
The payment is allocated to the specific invoice.
3. If there are no outstanding invoices, a policy payment is created and left unallocated.

If a policy has 0 USD outstanding, the payment amount is held at the policy level and is identified as an unallocated payment. This payment can be used in future to pay off another agency invoice.

When a 0 USD payment is passed, the system attempts to close out two or more invoices which have the total value of 0 USD. For example, the system would close an invoice of -100 USD and an invoice of 100 USD.

Parameters:

- `agencyPayment`: The agency payment to be allocated.
- `policyID`: The identifier of the policy to which the agency payment must be allocated.

This method is used before `AllocateAgencyPaymentToPolicy`.



## Increase the number of Policy Changes shown on the Proposal screen

### Previously

The **Policy Changes** section only shows the ten most recent policy changes for the proposal. (This can still be true.)

### Now

When this option is activated, you can decide how many policy change records to show, including all records.



If you want to use this feature, see your Origami Service Administrator to update your system settings.

### How and where

On the **Edit Proposal** screen, in the **Policy Change** section.

## Edit Files associated with a Cancelled Policy

### Previously

This functionality was not available.

### Now

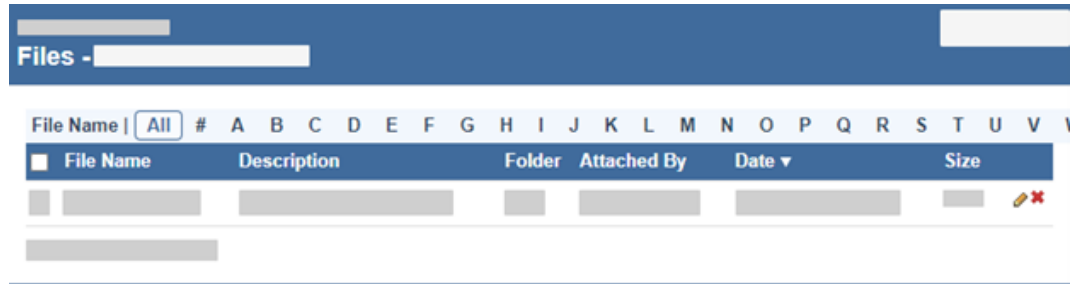
When this option is activated, you can edit files attached to a cancelled policy using the pencil icon.



If you want to use this feature, see your Origami Service Administrator to update your system settings.

**How and where**

1. Open a cancelled policy.
2. In the **Files** section, on the right, select **All Files**.
3. In the **Files** list, use the pencil icon to edit a specific file.



## Down Payment Due field calculations corrected for down payment invoices

**Previously**

When creating a Down Payment Invoice, the system ignored any values in the **Down Payment Due** field.

**Now**

When creating a Down Payment Invoice, the **Down Payment Due** field now overrides the **Days Notice** field and **Due Date** field settings when creating the Down Payment Invoice.

- The **Down Payment Due** date can only be entered as the current date or later.
- When the **Down Payment Due** field is left blank, the regular invoicing template is applied to the down payment invoice.

Example: If there is a down payment setup on a payment plan, and the **Down Payment Due** field is set to X days after the effective date, the **Down Payment Due** field will override any other setting.

**How and where**

- **Admin > Billing Profiles > Edit a Billing Profile**

## View all matches when running an Office of Foreign Assets Control check

**Previously**

When running an OFAC (Office of Foreign Assets Control) check on many records or tables before binding a new application, only one OFAC match was shown even if there were more. Users could clear all OFAC matches, but didn't know that the check returned more matches.

**Now**

If the OFAC check returns some matches, an **OFAC Clear** panel is shown with a message indicating that more OFAC matches were found.

**How and where**

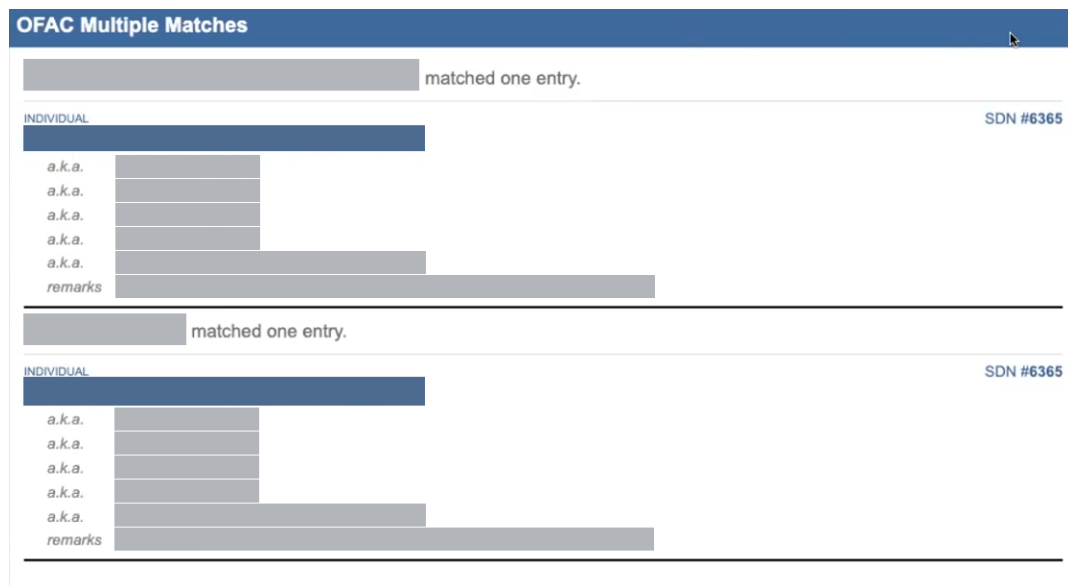
To run an OFAC check:

- On the Proposal View page, select **More > Search OFAC**.

When binding a new application, and running an OFAC check that returns matches, the system prevents the application bind. If any OFAC matches are found, an **OFAC Clear** panel is shown with a warning message about potential matches against the OFAC database.

You can do the following:

- Select the **See match details** link.  
A popup window with details on found OFAC matches is shown.



- Select **Clear all matches** to clear all OFAC matches, for example, when the insured has the same name as an individual in the OFAC database.  
The found OFAC matches are cleared, and you can continue binding the policy.

