January 2024
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.

Table of Contents

What's new?

> 💡 If you cannot see the new or changed features, ask your System Administrator to update your permissions.

New modules

COMING SOON: Origami Learning Center

New solution

The *Origami Learning Center* is our new, subscription-based learning resource for clients that is expected to be available in February 2024. The Learning Center contains in-depth standardized learning about concepts, modules, and workflows in the Origami Risk system. The Learning Center will also contain official certification courses from Origami Risk where you can earn certifications on different areas of the Origami Risk system.

The Learning Center contains over 150 learning topics and our first course for System Administrators.

> 💡 The learning content will be updated regularly as we continue to grow our learning catalog and certification repository.

How and Where

> 💡 The Learning Center is expected to be available in February 2024. Please contact your Origami Account Manager for updates on when you will be able to purchase access to the Learning Center.

To access the new Learning Center with your paid subscription, from the main menu, select *Learning Center*.

Focused professional practice evaluation (FPPE)

Why

Focused professional practice evaluation (FPPE) is a process that healthcare organizations use to evaluate practitioners under the following two scenarios.

- Initial FPPE: When a new healthcare provider has been granted new privileges at a healthcare organization and a certain number of evaluations are completed within a set number of months after the provider has been granted privileges.
- Triggered FPPE: When a practitioner has been identified as needing additional evaluating. This can be the outcome of a Peer Review Case or it can be the outcome of an Initial FPPE. In this scenario, the number of evaluations and the time frame from them to be completed can vary based on the FPPE.

Previously

Many health care providers currently utilize a paper process for FPPE.

New solution

We added new forms, which allow organizations to manage their FPPE process within the system. This allows organizations to utilize automated workflow and communication templates to streamline the process. Origami provides standardized evaluation forms for initial and triggered FPPEs and provide the ability for organizations to customize the forms to meet their FPPE policy requirements.

New user permissions

Domain level permissions

- Enable/disable user permissions for **FPPE Reviews** and **FPPE Summaries** domains.

Location access groups

- Access Groups can be created to limit access to FPPE Summary and FPPE Review records that have specified locations.

Users in this solution

Coordinator (permission is assigned via domain permission/roles)	Creates FPPE Summary and FPPE Reviews, assigns roles (department chair, MEC Chair, MEC members, provider, and reviewers), manages the review process. Has permission to view/edit/create FPPE Summaries, FPPE Reviews, and Performance Improvement Plans.
Reviewer (permission is assigned via user assignment)	Completes individual review of the provider. Has permission to view/edit their assigned FPPE Review.
Dept Chair (permission is assigned via user assignment)	Involved in overall review process, involved in making final determination, and deciding on follow-up actions. Has permission to view FPPE Summary, view FPPE Reviews, and create Performance Improvement Plans.

Medical Executive Committee member (permission is assigned via user assignment)	Makes final determination/decides follow-up actions. Has permission to view FPPE Summary, edit committee section of FPPE Summary, view FPPE Reviews, and create Performance Improvement Plans.
Medical Executive Committee Chair (permission is assigned via user assignment)	Leads the Medical Executive Committee. Has permission to view FPPE Summary, edit committee section of FPPE Summary, view FPPE Reviews, and create Performance Improvement Plans.
Provider (permission is assigned via user assignment)	Person being evaluated, receives information on results of evaluation and follow-up actions. Has permission to view FPPE Summary (except the FPPE Review grid panel), enter feedback in the ***Provider Comments*** field of FPPE Summary, and view Performance Improvement Plans.

The **New FPPE Summary** screen (Edit):

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Dashboards Tasks Claims Incidents Policies Locations Contacts Reports Admin

Search   Amanda Camilloni currently working in Standard Client   New Help (Internal)   New Help   Sign Out

Save Changes   Cancel

FPPE Summaries >
New FPPE Summary

Focused Professional Practice Evaluation Summary

		Department Chair	
FPPE Summary Number:	Empty to autogenerate	Ready for Department Chair Review:	☐
Coordinator User:	🔍	FPPE Completion Date:	
FPPE Summary Type:	○ Initial ○ Triggered		
Entry Date:	11/20/2023		
Initial Board Approval Date:			
FPPE Completion Due Date:			
Status:	○ In Progress ○ Complete		
Number Of Review Records:			

Department Chair Information

Assignee Type: *	[Named User] ▼	End Date:	
User: *	🔍	Read-Only:	- None Selected - ▼

Provider Information

Assignee Type: *	[Named User] ▼	End Date:	
User: *	🔍	Read-Only:	- None Selected - ▼

Please rate the provider in each of the categories based on the reviewed data

Patient Care:	Satisfactory	Unsatisfactory	N/A
Medical/Clinical Knowledge:	Satisfactory	Unsatisfactory	N/A
Practice-based Learning and Improvement:	Satisfactory	Unsatisfactory	N/A
Interpersonal and Communication Skill:	Satisfactory	Unsatisfactory	N/A
System-based Practice:	Satisfactory	Unsatisfactory	N/A
Professionalism:	Satisfactory	Unsatisfactory	N/A

Overall Competency

○ This provider meets the performance expectations for the privileges granted
○ This provider did not perform the minimum number of examinations / procedures
○ The provider meets the performance expectations for the privileges granted with an opportunity of improvement noted in the linked Performance Improvement Plan
○ This provider meets most performance expectations for the privileges granted except areas noted in the linked Performance Improvement Plan
○ A triggered FPPE will be performed

Medical Executive Committee Chair

Assignee Type: *	[Named User] ▼	End Date:	
User: *	🔍	Read-Only:	- None Selected - ▼

Medical Executive Committee

Medical Executive Committee Action:	- None Selected - ▼	Medical Executive Committee Date:	

Medical Executive Committee Comments:

Provider Comments

The ***FPPE Summary*** screen (View):

The **New FPPE Review** screen (Edit) - Initial evaluation:

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New FPPE Review

Save Changes Cancel

Initial Evaluation

Review Number:	[ ] Empty to autogenerate
FPPE Review Type:	Initial
Entry Date:	11/20/2023
Status:	○ Active ○ In Progress ○ Complete

Evaluation Method:	○ Chart Review ○ Direct Observation ○ Peer Review
Completion Date:	[ ] 🗓

Evaluator

Assignee Type:	[Named User] ▾
User:	[ ] 🔍

End Date:	[ ] 🗓
Read-Only:	- None Selected - ▾

Patient Information

Name:	[ ]
Date of Birth:	[ ] 🗓
Patient Age:	[ ]
MRN:	[ ]
FIN Number:	[ ]
Admit Date:	[ ] 🗓
Type of Visit:	[ ]

Please rate the provider in each of the categories based on the reviewed data.

Patient Care:	Satisfactory	Unsatisfactory	N/A
Medical/Clinical Knowledge:	Satisfactory	Unsatisfactory	N/A
Practice-based Learning & Improvement:	Satisfactory	Unsatisfactory	N/A
Interpersonal & Communication Skills:	Satisfactory	Unsatisfactory	N/A
System-based Practice:	Satisfactory	Unsatisfactory	N/A
Professionalism:	Satisfactory	Unsatisfactory	N/A

The **New FPPE Review** screen (Edit) - Triggered FPPE:

Facial diagram selector

Why

The facial diagram selector supports healthcare clients who may need to report injuries to specific teeth or facial structures at a more detailed level than our standard body part diagram.

New solution

The facial diagram selector includes seven detailed facial charts that can be used for streamlined reporting of dental and facial injuries. Now, when you create an incident or claim involving cases where an individual suffers injuries to teeth or specific facial parts or structures, you can select clickable dental charts and facial diagrams to enter detailed information about the injuries.

Screens

The *Adult Dental Chart* facial diagram:
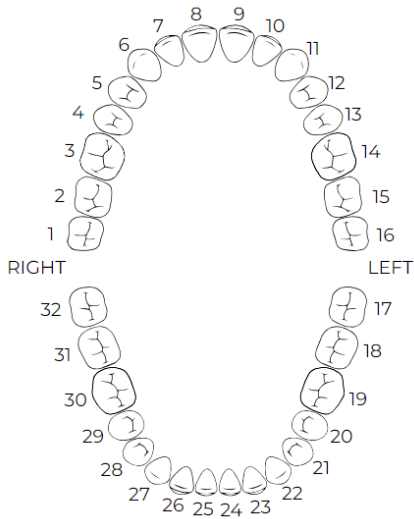
The *Pediatric Dental Chart* facial diagram:

The *Mandible* facial diagram:

The *Extraoral Map* facial diagram:

The *Intraoral Map* facial diagram:

Select the appropriate Facial Diagram, then click on the part(s) where the primary injury occurred.

Facial Chart: *   [Intraoral Map ▾]

Facial Part: *   [- None Selected - ▾]

Percent Impairment: *   [0.00]

Facial Part Location: *   [- None Selected - ▾]

Not Reportable ⓘ   ☐

[Add Part]

Facial Part	Facial Part Location	Percent Impairment	Not Reportable

The **Nasal Maxillary** facial diagram:
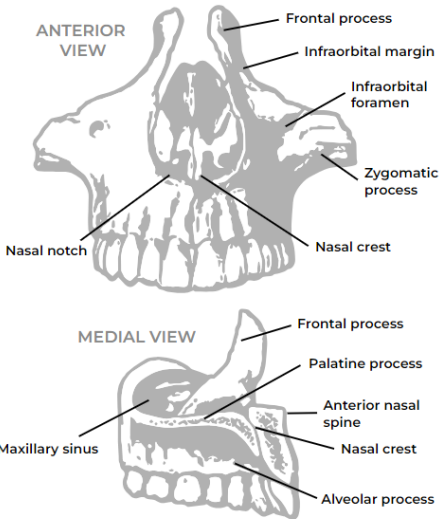
Select the appropriate Facial Diagram, then click on the part(s) where the primary injury occurred.

Facial Chart: *   [Nasal Maxillary Map ▾]

Facial Part: *   [- None Selected - ▾]

Percent Impairment: *   [0.00]

Facial Part Location: *   [- None Selected - ▾]

Not Reportable ⓘ   ☐

[Add Part]

Facial Part	Facial Part Location	Percent Impairment	Not Reportable

The **Nerve Supply Map** facial diagram:
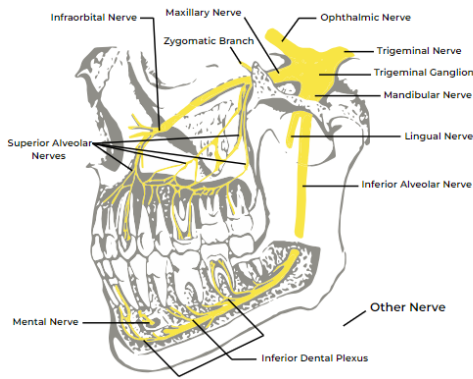
Example facial diagram selector showing selections from multiple facial diagrams:
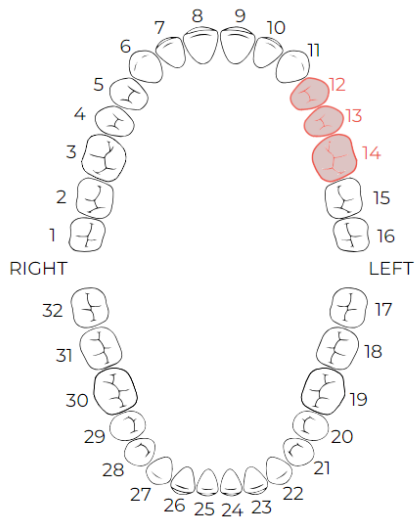
Facial Part	Facial Part Location	Percent Impairment	Not Reportable	
Second bicuspid (upper left)	Left (L)	100.00	No	✖
First bicuspid (upper left)	Left (L)	90.00	No	✖
First molar (upper left)	Left (L)	95.00	No	✖
Ramus	Left (L)	40.00	No	✖
Cheek	Left (L)	90.00	No	✖

This table shows the selections from every facial chart.

System administrators

Data import center administration

Export notes in Excel, CSV, and PDF formats

Previously

In the October 2023 release, we enabled data import center for notes. This allowed users to export notes in data import center format; however, there was no option to simply export the note data as it was seen on the screen in Excel, CVS, and PDF formats.

Now

You can now export notes in Excel, CSV, and PDF formats.

New role permissions

New role permissions in the ***Note*** section.

Export from Grid	Indicates if this role can export notes in Excel, CSV, and PDF formats.

How and Where

⚙ **Update the relevant permissions**

1. From the ***Main*** menu, select ***Admin***.

2. From the ***Users and Security*** section, select ***Roles***.

3. Select the role to which you want to apply the permission.

4. In the ***Note*** section, update the ***Export from Grid*** permission.

   > 💡 If you cannot see check boxes on the ***Roles*** screen, it may be an account-level role. From the ***Gear*** menu, select ***Account:...*** then repeat the steps above.

5. In the top right of the ***Permissions assigned to Role*** section, select ***Save Permissions***.

To export notes in Excel, CSV, and PDF formats

> 💡 Users will need their permissions updated to use this new functionality.

1. Navigate to an item that contains a note, for example, a claim or location.

2. In the **All Notes** section on the right, select **All Notes**.

   All notes for this item are displayed.

3. Select **More**, and in the **Export** section, select the format for which you want to export the current view (i.e. listed columns) of the notes.

System-wide administration

Configure field mappings for "Copy From Other Schedule" auto create types

Previously

When configuring a coverage to be auto created from a different source domain, fields being populated to the target domain had to be named the same as the fields in the source domain, which required assistance from Service.

Now

You can now map different fields from the copy from domain (source domain) to the target domain. This feature can be utilized by creating a script in the policy schedule record.

How and where

1. From the main menu, select **Admin**.

2. In the **Policies and Underwriting** section, select **Rating Program**.

3. Select the rating program.

4. In the **Rating Calculation Formulas Schedule** area, select the grid icon next to the schedule domain with the target coverage you are copying.

5. Select the coverage you are mapping to.

   The **Schedule Coverage** screen is displayed.

6. In **Auto Create Type**, select **Copy From Other Coverage Schedule**.

7. In **Copy from Domain**, select the source domain from which you are copying.

8. In the **Copy Match Fields** box, enter the field(s) you want the system to match on, which allows the system to know which records should be copied to other records. The format is `(Source FieldName=(Form PropertyName)`. For example, if for vehicle coverages we want to match the state on source domain to the location state the vehicle coverage is linked to, enter `State=(LocBldgNum.State)`.

9. Select *Use Auto Create Script*.

    In the *Script* field, the system creates a shell function in which you can type the logic.

10. In the *Script* field, enter the script you want to run to augment the existing functionality.

    The system automatically copies the fields that have the same name between the source and target domains. The script can handle more complicated logic where the mapping may be conditional or may require some transformations.

    The objective of the function is to set the values in the destination parameter. In the following example, the destination parameter is a `Custom.ISOCAVehCovg` instance, and the source is a `Custom.ISOCAStateDefault` instance. The system sends in the parent of the `ISOCAVehCovg` (in this example, vehicle instance) in the `destparent` parameter. Because conditional mapping often requires fields from the parent record, this ensures the script does not have to query the database for this record.

Auto Create: ☑ Use Auto Create Script

Script ⓘ
```
1 function AutoCreateFieldMap(source, destination, destparent, ctx) {
2
3   ctx.DebugLog("Setting auto create values.");
4
5   var vehicle = destparent;
6   if (vehicle.Make=="Ford")
7     destination.CADeductibleMH = "Motor Company";
8   else
9     destination.CADeductibleMH = "Testing";
10
11  destination.OccLimit = 2000;  // ignore what was coming in
12
13 }
14
```

Create detailed search templates then add the search queries to domain search screens

Previously

If there was a complicated search that a user needed to perform, a complex search query needed to be written. This search query was complicated and very limited to its searching capabilities.

Now

A new module has been created that is used to define lookups and create search queries, so that the end user experience is much simpler for conducting a search.

This module is called *User Defined Lookups* and it allows admin users to create search templates and then search queries that will be used by end users to quickly perform. When the search query lookup is added to a domain's search screen, the user will merely see a lookup field to another domain, but behind the scenes, the lookup will run the defined complex domain search and find all relevant records.

How and where

To create a new user defined lookup search template query

1. From the main menu, select *Admin*.

2. In the *Fields, Labels and Forms* section, select *User Defined Lookups*.

3. Select *More* and then select *Manage Search Queries*.

4. Select the *New User Defined Lookup Search Query* button.

5. The *New User Defined Lookup Search Query* screen displays.

   In the *Name* field, enter the name that will be given to this search query.

6. In the *Search Query* field, the query must be manually entered.

   The *Instructions* section may be opened to instruct the user on how to write a query. This section also provides example queries for a user to follow.

7. Select *Save Changes*.

To edit an existing user defined lookup search template query

1. From the main menu, select *Admin*.

2. In the *Fields, Labels and Forms* section, select *User Defined Lookups*.

3. Select *More* and then select *Manage Search Queries*.

4. Select the query that will be modified.

5. Select *Edit User Defined Lookup Search Query* to edit the query.

6. Once the modifications have been completed select *Save Changes*.

To define a new user defined lookup search

1. From the main menu, select *Admin*.

2. In the *Fields, Labels and Forms* section, select *User Defined Lookups*.

3. On the *User Defined Lookups* screen, select *New User Defined Lookup* .

4. The *New User Defined Lookup* screen displays.

5. In the *Name* field, enter the name to be used for the lookup the query.

6. In the *Label* field, enter the label to be used for the lookup the query.

7. *Is Active* should be set to *Yes.*

8. In the *Search Domain* and *Lookup Domain* drop-down lists select the domains the search query will be applied to.

9. The *Search Query* drop-down list will display all user defined lookup search queries that have been created. Select the desired lookup search query.

10. Select *Save Changes*.

To edit an existing user defined lookup search

1. From the main menu, select *Admin*.

2. In the *Fields, Labels and Forms* section, select *User Defined Lookups*.

3. Select the defined lookup query that will be modified.

4. Select the *Edit User Defined Lookup* button to edit the lookup query.

5. Once the modifications have been completed select *Save Changes*.

To add the search query to search configuration screen

1. From the main menu, select *Admin*.

2. In the *Fields, Labels and Forms* section, select *Custom Forms*.

3. Select the form set.

4. From the *Search Screen Configuration* section, locate the configuration screen and select *New*.

   For example, select *Document Control.*

5. The *Screen Configuration* screen appears.

6. In the *Search Fields* section, select *Search Column Editor*.

7. The *Select Search Columns* screen displays.

8. In the *Select a column to add* section, locate the name of the search query to be used.

   The search query is displayed under the *User Defined Lookups* section.

   The search query will appear on the *Column or Expression* section.

9. Select *Apply Changes* to save.

10. Select *Save* .

11. Open the screen where the search query has been added. Refresh the screen. For example, select *Document Control*.

12. The search query field will display in the *Filter By* section.

Configure the columns in individual sections on the user assignment portal

Previously

When accessing a user assignment portal, each grid for a domain's assignments had the same columns: *Name*, *Type*, and *End Date*. You could not configure different columns to appear.

Now

You can configure domain specific columns to each domain included in a user assignment portal.

How and where

To add columns

1. From the main menu, select *Admin*.

2. In the *Accounts* section, select *User Assignment Portal*.

3. Select the user assignment portal for which you want to add columns.

4. Select *Edit User Assignment Portals*.

    The *Edit* screen displays.

5. In the *Allowed Assignments* drop-down list:

    • If *Select Assignments* is selected, rows for each domain displayed in the *Allowed Domains* field will automatically be added.

    • If *All Assignments* is selected, you have to manually add rows for each desired domain

6. Select *Edit User Assignment Portals*.

7. In the *Domain Specific Grids* section, select *Add New*.

8. Select the domain.

9. Select *Edit Columns*. The *Select View Columns* screen displays.

10. In the *Select a column to add* area, select the column to add.

11. Select *Apply Changes*.

To edit columns

1. From the main menu, select *Admin*.

2. In the *Accounts* section, select *User Assignment Portal*.

3. Select the user assignment portal for which you want to edit columns.

4. Select *Edit User Assignment Portals*.

    The *Edit* screen displays.

5. In the *Domain Specific Grids* section, select *Edit Columns*.

    The *Select View Columns* screen displays.

6. In the *Select a column to add* area, select the column to add.

7. Select *Apply Changes*.

To delete columns

1. From the main menu, select *Admin*.

2. In the *Accounts* section, select *User Assignment Portal*.

3. Select the user assignment portal for which you want to delete columns.

4. Select *Edit User Assignment Portals*.

    The *Edit* screen displays. In the *Allowed Assignments* drop-down list

    - If *Select Assignments* is selected, rows for each domain displayed in the *Allowed Domains* field will automatically be deleted.
    - If *All Assignments* is selected, you have to manually delete rows for each desired domain.

5. In the *Domain Specific Grids* section, in the row corresponding to the column you want to delete, click the delete icon (red X).

6. Select *Apply Changes*.

Copy a record within an editable grid panel

Previously

The only way to copy a record in a grid panel was to open the record in view mode, select *More* then select *Copy*. This was not intuitive and took the user away from the section they are working within.

Now

To the `gridPanel` element, we added a new `enablecopy` attribute. When this attribute is enabled, a copy button is displayed on each row of the editable grid panel. After selecting *Copy*, the system displays a window that allows you to create a new record with the data copied from the source record.

The copy function works only if

- The grid panel is editable. A grid panel is editable if the following `gridPanel` elements are `true`:

  `inlineEdit`

  `editableGrid`

- The user has both *create* and *edit* permissions to the record they are copying.

Learn more about custom forms

Configure the number of records shown when using a landing page within external access

Previously

If you had external access landing pages set up for external access links, by default the landing page would only display five rows/records, per domain. You could not configure the number of rows/records the landing page displayed.

Now

The *New External Access Type* screen contains a new *Landing Page Rows* field that allows you to define the number of records/rows, per domain, that are displayed on the landing page. Additionally, on the landing page, the panels show the number of records in the list. For example, 1 of 25.

New fields

New fields on the *New External Access Type* screen.

Landing Page Rows	Indicates the number of rows that are displayed, per domain, on the landing page. A row contains one record. By default, the system displays 10 rows. If the field is left blank, the system will use the default.
	If there are multiple access types for the same domain on the same landing page, the largest one is used. For example, if there are two claim access types and the rows are set to 10 and 20, 20 will be used for all claim types.

How and where

1. From the main menu, select *Admin*.

2. In the *Origami Administration* section, select *External Access*.

   The *External Access Types* screen displays.

3. Select *New External Access Type*.

   The *New External Access Type* screen displays.

4. Provide the relevant data.

5. In the *Landing Page Rows* field, enter the number of records/rows you want the landing page to display. You can enter 1-50. By default the system displays 10 records/rows.

6. Select *Save Changes*.

The "Files-Attach" permission now works independently from the "Files-View" permission

Previously

Previously a user needed both *Files-Attach* and *Files-View* permissions to attach files to a record in the system. If a user just had *Files-Attach* permission, the system did not display a place for the user to attach the files. This was a security concern as users should not have to view files to attach new files.

Now

The *Files-Attach* permission is the only permission needed to upload files to a record in the system. If a user has *Files-Attach* permissions but not *Files-View* permission, they can attach new files but cannot view any existing files. If a user has both *Files-Attach* and *Files-View*

permissions, they will be able to upload new files and view existing files.

There is no action needed for this change to take effect. However, you may want to review role permissions in your client databases to ensure you are giving the correct access. If you previously updated your configuration to account for the change, you can now simplify the configuration for some use cases.

For example, when this change was made originally, you had to grant users *Files-View* permissions to be able to attach files. If you have a use case/workflow that only necessitates uploading and not viewing, you can remove the *Files-View* permission.

Bureau central repository (BCR) administration

Specify which version of a BCR mail merge letter is used for a specific state or rating company

Now

If you use imported mail merge templates from the BCR, you can now specify which version of a mail merge letter is used for a specific state or rating company (defined in the version key). For example, you can now adopt a different version of a mail merge letter to use for a state than what the bureau has set for applicability.

LetterTemplateVersionOverrides	This table contains it's own set of version keys. Users can create multiple overrides for any *LetterTemplateVersion*. Each override contains it's own unique version key and state applicability settings

New screen

New Letter Template Version Override screen	Use this screen to specify which version of a mail merge letter is used for a specific state or rating company (defined in the version key)

Fields on the New Letter Template Version Override screen

Description	A short description of this override. The source version is automatically entered in this field.
Version Key Date	Indicates the date of the version key. • You can enter the date manually, or select the calendar icon for more options.
Version Keys	The version keys included in this override. • Select the field, then select the version key. • To add another version key, selecting the field again.
Effective Date	The letter template effective date for a specific state.
Expiration Date	The letter template expiration date for a specific state.

What you can do on the New Letter Template Version Override screen

	Select all or unselect all states in the list.
	Invert the current selection of states.

How and where

1. At the account or client level, from the main menu, select *Admin*.

2. In the *Fields, Labels and Forms* section, select *Mail Merge Templates*.

3. Select the name of the mail merge template for which you want to edit.

4. In the *Letter Template Sections List*, select the section that contains the source letter template version for which you want to override.

5. In the *Source Letter Template Versions* section, select the version for which you want to override.

6. In the *Local Overrides* section, at the bottom of the screen, select *New Override*.

7. Add the version key information and modify the effective dates and expiration dates, as needed.

8. Do one of the following to select the states that are included in this override:

   • Manually select the box after each state included in this override.

   • To select all of the states, select the top box in the *State Applicability* heading.

   • To invert your current selection, select the half gray box in the *State Applicability* heading.

9. Select *Save Changes*.

The override is shown in the *Local Overrides* section list.

Claims administration

Policy for Claims: Change the policy retrieve type and view external and internal policy snapshots on the policy snapshots section

Previously

There were two distinct policy for claims workflows: External policy for claims and Internal policy for claims. Users typically only followed one workflow. Policy snapshots could only be retrieved from either the *internal origami policy* domains or from an external policy admin system.

Before the creation of the hybrid policy for claims client type, there were only external policy for claims clients and internal policy for claims clients. For these users, the policy snapshots grid on the *Loss Event - view* screen would only display linked policy snapshots that were generated from either an external policy administration system or from the *internal origami policy* domains, depending on the user's *Import Source* type. The policy snapshots grid was not able to display policy snapshot records that were generated from different systems because the data elements could differ between each system and its records.

Now

A new hybrid client import source type was created on the *Policy for Claims Admin* screen. When configured and when performing a policy retrieve in the hybrid policy for claims workflow, users will be able to change the policy retrieve type between the internal source and the external source.

For clients using the hybrid policy for claims workflow, if a loss event has both internal and external policy snapshots attached, users will now see a tab control on the policy snapshots section to switch between both sets of records. Switching between the tabs will display the corresponding records and data columns in the policy snapshots section.

New fields

New fields on the *Policy for Claims Admin* screen.

Import Source	Indicates a hybrid client.
Hybrid Import Sources	Indicates one external source and one internal source.
Default Hybrid Import Source	Indicates the policy snapshot tab that will display first on the policy snapshot grid.

How and where
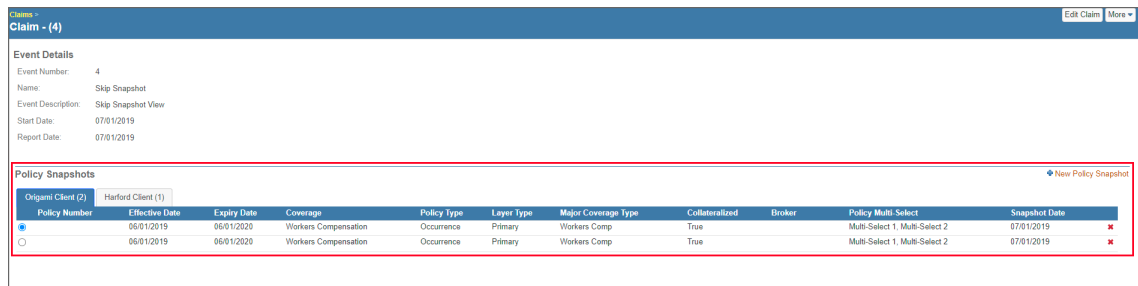
1. In the *Policy for Claims Admin* screen, in the *Import Source* list, select *Hybrid Client*.

2. In the *Hybrid Import Sources* area, select at least one external source and one internal source.

3. In the *Default Hybrid Import Source* list, select the policy snapshot tab that will display first on the policy snapshots grid.

    This setting will show all of the currently selected *Hybrid Import Source* options.

4. Navigate to any loss event and add a policy snapshot from both the external source and the internal source.

    Once the loss event has a policy snapshot from each source added, the tabs will automatically appear and will be labeled accordingly.

5. Click on the tabs to switch between the different policy snapshots grid views.

Policy for Claims: Enable support for multiple CDE risk units on a loss event

Previously

For internal policy for claims clients, the risk unit functionality was limited to sourcing risk unit records on a loss event from only one client defined entity (CDE) even if a policy snapshot was added on a policy with multiple risk units from different CDEs.

Now

For internal policy for claims clients, if a policy snapshot is added to a loss event that has risk units from multiple CDE sources, then tabs for each risk unit source will display on the *Risk Units* grid on the *Loss Event view* screen. Users can click between the tabs to change the grid view to display the selected risk unit records and associated data columns. When a risk unit tab is open, users will be able to add risk units from that risk unit source by selecting *New Risk Unit*.

How and where

To setup an internal policy for claims workflow

1. In the *Policy for Claims Admin* screen, in the *Import Source* list, select *Origami Base* or *ISO*.

2. On a loss event, add a policy snapshot with multiple types of risk units. For example, risk units from multiple CDE sources.

   At the account level, a CDE needs to have *Risk Unit Flag* enabled in order to be considered as a risk unit source.

   The *Risk Units* grid will display tabs for each type of risk unit that is available to add to the loss event. When a tab is selected and opened, the associated risk unit records will display along with the configured grid columns for the CDE source.

3. Click *New Risk Unit* to add a risk unit of the associated type.

   The *Risk Unit Selection* screen displays.

4. Add a Risk Unit record(s).

   The *Loss Event* screen will refresh to display the added risk units on the associated tab.

Define exposure level fields for claim evaluation

Now

You can now store important data points to evaluate a claim. This allows a claims adjuster, for example, to pull a point in time snapshot of a policy, to review the coverage and limits the insured had during the time the claim occurred.

New fields

New fields on the *Exposure Coverages* screen.

Policy Type	Specifies which field is used to capture the type for the policy.
Tail Date	Specifies which field is used to capture the tail date for the policy.
Retro Date	Specifies which field is used to capture the retroactive date for the policy.
Aggregate Limit	Specifies which field is used to capture maximum total amount the insurer can pay for an insured's claim during a policy period.
Aggregate Deductible	Specifies which field is used to capture the maximum total amount the insured has to pay in deductibles during a policy period.
Incident Limit	Specifies which field is used to capture the maximum total amount per event or incident.

Incident Deductible	Specifies which field is used to capture the maximum total amount the insured has to pay in deductibles for each event or incident.
Insured Limit	Specifies which field is used to capture the maximum total amount for blanket coverage.
Insured Deductible	Specifies which field is used to capture the maximum total amount the insured has to pay in deductibles for blanket coverage.

How and where

⚙ **Allow a schedule table to have exposure level coverages**

1. At the client level, from the main menu, select *Admin*.

2. In the *Policy and Underwriting* section, select *Rating Programs*.

   Select the name of the rating program that contains the schedule table to update.

3. In the *Schedule Table Calculations* section, select the schedule table you want to update.

4. Select *Use Exposure Level Coverages*.

5. Select *Save Policy Schedule*.

⚙ **Map applicable fields**

Specify which exposure level data points you want to use to evaluate a claim.

1. At the client level, from the main menu, select *Admin*.

2. In the *Policy and Underwriting* section, select *Rating Programs*.

   Select the name of the rating program that contains the schedule table to update.

3. In the *Schedule Table Calculations* section, for the schedule table, select *Edit Calculations*.

   > 💡 The schedule table must have the *Use exposure level coverages* field selected.
   >
   > See above steps for more information.

4. Select *More*, and in the *Schedule* section, select *Configure Exposure Coverages*.

5. Select the type of exposure to edit the settings.

   > 💡 To see the new fields, you must select a coverage that is tied to a schedule.

6. To specify an exposure level data point, select the field then, from the drop-down, select the corresponding database field that contains the matching information.

7. Provide the relevant data for any other fields you want to use to evaluate a claim.

8. Select **Save Changes**.

Restrict the Close and Reopen date fields on a claim to read only and auto-populate with today's date

Previously

On both the **Close Claim** and **Reopen Claim** forms, the respective **Close Date** and **Reopen Date** fields were editable and there was no way to make them read-only through configuration.

Now

When this open is activated, you can now make the **Close Date** or **Reopen Date** fields read-only and restrict the value of the field to be set to the current day.

> To use this feature, contact your Origami Service administrator.

Run state forms in bulk on claims index page

Previously

You could run state forms for a single claim record, but there was not an option to run forms in bulk (multiple claims at once).

Now

Bulk action generation for state forms has been enabled. If you have the correct permissions, you can now generate state forms in bulk from the Claims index page.

New fields

New fields on the **Bulk Action: Online State Forms** screen.

State Form	Indicates the name of the state form to be used. • You can select the magnifying glass icon to perform a form search.
File Name	Specifies the file name to be given to the bulk action state form. • If you want to use a default name, leave this field blank.
Options	Specifies if the user will receive an email notification about the form. • If you want to receive an email link with the forms combined into a single PDF, select the first radio button. • If you want to receive an email link with the forms in separate PDFs, select the second radio button. • If you do not want to receive an email link for the forms, select the third radio button.

How and where

⚙ **Role permission for bulk action**

1. From the main menu, select ***Admin***.

2. In the ***Users and Security*** section, select ***Roles***.

   Select the role.

3. In the ***Permissions Assigned to Role*** section, find ***Bulk Action-State Forms*** check box.

   If the check box is selected, the user has permission.

4. If the ***Bulk Action-State Forms*** check box is not selected, select it and select ***Save Permissions***.

Running the state forms in bulk

1. From the main menu, select ***Claims***.

2. Select ***More***, and in the ***Bulk Actions*** section select ***Online State Forms***.

3. Select more than one (1) claim by using the check box next to the claim number.

   Select ***Next***.

4. The ***Bulk Action: Online State Forms*** screen displays.

5. In the ***State Form*** field, select the state form to be used for the selected claims.

6. In the ***Options*** section the user may select a single page PDF, multiple PDF, or no PDF.

7. Select ***Submit***.

Job safety analysis (JSA) / Lockout tagout (LOTO) administration

Import JSA steps or LOTO steps records

Previously

You had no ability to import job safety analysis (JSA) or lockout-tagout (LOTO) domain records within the Origami application.

Now

You can now upload JSA or LOTO domain records into the Origami application using the **Data Import Center** import spreadsheet template.

How and where

1. From the main menu, select **Admin**.

2. In the **Import/Export** section, select **Data Import Center**.

3. To download the import spreadsheet template, open the **link**, on the instructions section.

4. Open the spreadsheet.

5. Enter the record data.

   - For a JSA, enter a record into the **Job Safety Analysis Record** or the **Document Control** columns. Save the spreadsheet.

   - For a LOTO, enter a record into the **Lockout-Tagout Procedure** or the **Document Control** columns. Save the spreadsheet.

6. On the **Data Import Center** screen, select **Choose File**.

7. The **Open** window displays, select the spreadsheet.

8. Select the **Submit**.

Save a primary photo on a designated folder for a JSA or LOTO

Previously

Adding a Primary Photo to a job safety analysis (JSA) step or a lock out tag out (LOTO) step was complex, since a record needed to be saved first, then files must be attached, and finally specific fields must be filled out while on the field.

Now

The primary photo file can be added to the JSA step or LOTO step while creating or editing the record step. Additionally, a default folder can be designated to store the primary photo file. This streamlines the workflow so it can be done in a more efficient way.

New fields

New fields on the *New Schedule* screen.

PrimaryFile	Allows for a user to upload a primary photo to a JSA or LOTO record.
defaultFolder	This field is used to determine the folder where the primary photo will be saved in.

How and where

To allow a primary photo attachment in a JSA

1. From the main menu, select *Admin*.

2. In the *Fields, Labels and Forms* section, select *Custom Forms*.

3. From the list, select the form set to which the form belongs.

4. Locate the *Default for Job Safety Analysis Steps* form.

5. In the *View Mode* column or the *Edit Mode* column, select *Edit Form*.

6. Edit the XML.

   • From the *Field List* on the right of the screen, drag the *PrimaryField* code into the XML form.

   > You can use system fields and custom fields in your custom forms. Custom fields allow you to capture additional information in your forms. For example, you can change the character limit for the field.
   >
   > To add a new custom field to a form, you need to create the custom field first. You can also edit an existing field to change the type of data shown in the field.

7. In the *PrimaryField* code enter the desired save folder next to *defaultFolder=*.

   For example, `<field name="PrimaryFile"defaultFolder="EMAIL" width="Large"/>`.

8. Select *Save Changes*.

To allow a primary photo attachment in a LOTO

1. From the main menu, select **Admin**.

2. In the **Fields, Labels and Forms** section, select **Custom Forms**.

3. From the list, select the form set to which the form belongs.

4. Locate the **Default for Lockout Tagout Steps** form.

5. In the **View Mode** column or the **Edit Mode** column, select **Edit Form**.

6. Edit the XML.

   • From the **Field List** on the right of the screen, drag the **PrimaryField** code into the XML form.

   > 💡 You can use system fields and custom fields in your custom forms. Custom fields allow you to capture additional information in your forms. For example, you can change the character limit for the field.
   >
   > To add a new custom field to a form, you need to create the custom field first. You can also edit an existing field to change the type of data shown in the field.

7. In the **PrimaryField** code enter the desired save folder next to **defaultFolder=**.

   For example, `<field name="PrimaryFile"defaultFolder="EMAIL" width="Large"/>`.

8. Select **Save Changes.**

> ✓ In the Help Center, navigate to the **Managing Custom forms** topic for detailed information.

Data entry events (DEE) administration

Add change history for DEE and associated actions

Previously

Change history was supported on DEE, but it only tracked changes to the event record and not the actions tied to the event.

Now

Change history now captures changes made to actions on DEEs in addition to changes associated to the event itself.

How and where

To track changes to actions on DEEs

1. From the main menu, select *Admin*.

2. In the *Origami Administration* section, select *Origami Settings*.

3. Select *Origami.AuditedDomains*.

4. In the *Value* field enter *Event* as the new tag name to this domain.

   If the *Event* tag was previously added the system will automatically start logging for actions when the feature is released

5. Select the *Save Changes* button.

Assign a team using FTE on a new user assignment data entry event (DEE) action

Previously

In a new user assignment data entry event (DEE), it was possible to dynamically assign an individual but not dynamically assign a team.

Now

You can dynamically assign a team within the DEE by selecting a form tag extension (FTE). Like with the other dynamic assignees, the FTE is processed at runtime to dynamically create the assignment.

> ☀️ To use this feature, you must have a valid FTE configured for the domain corresponding to the DEE. The following are valid FTEs:
> - SQL FTEs that have the *Result Domain* set to *Team*
> - JavaScript FTEs

New fields

New fields on the *Team Assignment* screen.

Dynamic Team	Allows you to assign a dynamic team to the DEE, and enables the dynamic team drop-down list.
	• If you want to assign a dynamic team to the DEE, select the check box, and from drop-down list, select the form tag extension. The form tag extension corresponds to the dynamic team you want to assign to the DEE.

How and where

1. From the main menu, select *Admin*.
2. In the *Fields, Labels and Forms* section, select *Data Entry Events*.

   A table with existing data entry events is displayed.
3. Select the data entry event to which you want to assign a dynamic team.

   The *Data Entry Events Details* screen is displayed.
4. In the *Create a new action* list, select *New User Assignment*.

   The *User Assignment* screen is displayed.
5. Select *Assign Team*.

   The *Team Assignment* screen is displayed.
6. Select the *Dynamic Team* check box.
7. In the drop-down, select the relative form tag extension.

   The form tag extension corresponds to the dynamic team you want to assign to the DEE.
8. Select *Assign*.

Manually fire data entry events on the users domain and view bulk action events from the more menu

Previously

You could create data entry events (DEE) on the *Users* domain but there was no option to manually fire the DEEs like there is on other domains.

Now

You can manually fire DEEs created on the *Users* domain.

Additionally, there is a new *Bulk Actions - Events* role permission within the *Users role permissions* section. When this permission is granted, on the Users index page, DEEs that have been set to be manually run as a bulk action will appear under the *More* button. This allows users to manually run these events across multiple records with one bulk action.

New role permissions

New role permissions in the *User* section.

Bulk Action - Events	Indicates if this role can manually fire bulk actions for DEEs created on the *Users* domain

New fields

New fields on the *Data Entry Event Details* screen.

Allow Manual Fire of this event	Indicates the data entry event can be manually fired.

How and Where

⚙️ **Update the relevant permissions**

1. From the ***Main*** menu, select ***Admin***.

2. From the ***Users and Security*** section, select ***Roles***.

3. Select the role for which you want to grant ***Bulk Action - Events*** permission.

4. In the ***Permissions assigned to Role*** section, in the ***User*** section, select the ***Bulk Action - Events*** check box.

5. In the top right of the ***Permissions assigned to Role*** section, select ***Save Permissions***.

To setup the ability to manually fire data entry events created on the Users domain

How and where

1. From the main menu, select ***Admin***.

2. In the ***Fields, Labels and forms*** section, select ***Data Entry Events***.

   The ***Data Entry Events*** screen displays.

3. Select ***New Data Entry Event***.

   The ***Select Event Area*** screen displays.

4. From the list, select ***Users***. This indicates the new data entry event will be on the Users domain. The ***New Data Entry Even***t screen display.

5. Provide the relevant data to create a new data entry event.

6. In the ***Manual Event Details*** area, select the ***Allow Manual Fire of this event*** check box.

7. If you want to allow this event to run as a bulk action, select the ***Allow event to be run as Bulk Action*** check box.

8. Select ***Save Changes***.

Use email templates for DEE

Previously

Users needed to copy and paste email bodies and templates for each DEE email.

Now

An email template drop-down has been added to the email actions. When a user selects a template, the ***Email To, Cc, Bcc, Subject, Email Type, Body, Reply to address***, and ***Email Attachments*** fields will be populated from that template. If a user changes the template, the pre-populated fields will be cleared and filled out accordingly with the new template. Users will be able to edit fields after selecting a template. The email templates vary by domain.

New fields

New field on the ***New Actions-Email*** screen.

Choose Template	Specifies which email template will be displayed and used. The available options will vary depending on the domain
	💡 This drop-down only displays pre-defined email templates.

How and where

To create a new email using a template

1. From the main menu, select ***Admin***.
2. On the ***Fields, Labels and Forms*** section, select ***Data Entry Events***.

   Select the name of the event you want to edit.
3. On the ***Actions Triggered by Event*** section, open the ***Create a new action*** drop-down.

   Select ***New Email***.
4. The ***Choose Template*** drop-down will display the available email templates a user may select from. Make a selection.
5. Select ***Save Changes***.

To add a template to an existing email

1. From the main menu, select ***Admin***.
2. On the ***Fields, Labels and Forms*** section, select ***Data Entry Events***.

   Select the name of the event you want to edit
3. On the ***Actions Triggered by Event*** section, select the email.
4. The ***Choose Template*** drop-down will display the available email templates a user may select from. Make a selection.
5. Select ***Save Changes.***

Document controls | Policies and procedures management (PPM) administration

Add custom fields and custom views to document control templates

Previously

There was not an option to add custom fields and custom views to document control templates.

Now

You can add custom fields and custom views to document control templates as you can with other custom forms.

How and where

1. From the main menu, select *Admin*.

2. In the *Form, Fields and Label* section, select *Custom Fields*.

   The *Custom Fields* screen displays.

3. Select *Add a New Field*.

4. In the *Select the Area* list, select *Document Controls Template*, which is the domain for which you want to create custom fields.

5. Provide relevant data.

   > ✓ In the Help Center, navigate to the *Add a New Field screen* topic for detailed information.

Configure the document control source panel on the document control form

Previously

When configuring a document control form, the document control source panel was hard coded and not configurable.

Now

> 💡 This functionality is available in the *Document Controls* domain.

For a document control form, you can now configure the document control source panel with the new `documentControlSourcePanel` XML element.

For example, using the new `documentControlSourcePanel` XML element, you can configure the title and available sources in the document control source panel.

How and where

> ✓ In the Help Center, navigate to the ***Creating Custom forms*** topic for detailed information.

Use an existing document control record as a template

Previously

You could only create a document control by either the default type or specific type that had been set up.

Now

You can create a blueprint and use that as a template from which to create new document control records. This will copy over data elements and, if there is one, the attached document.

When these permission are granted, you can now create, view, delete, edit, create a blueprint from an existing document control, and create a document control from a blueprint.

New role permissions

New role permissions in the ***Document Controls*** section.

Blueprints - Create	Indicates if this role can create blueprints.
Blueprints - View	Indicates if this role can view blueprints.
Blueprints - Delete	Indicates if this role can delete blueprints.
Blueprints - Edit	Indicates if this role can edit blueprints.
Blueprints - Edit File	Indicates if this role can edit the file attached to the blueprint.

How and Where

⚙ **Update the relevant permissions**

1. From the ***Main*** menu, select ***Admin***.

2. From the ***Users and Security*** section, select ***Roles***.

3. Select the role to which you want to update permissions.

4. In the ***Document Control*** area, update the applicable permissions.

5. In the top right of the ***Permissions assigned to Role*** section, select ***Save Permissions***.

To create a blueprint

> -ᵔ- Users will need their permissions updated to use this new functionality.

1. Navigate to *Document Controls*.
2. Select the *More* and then select *Document Control Blueprints*.

   This system filters the *Document Control* view to show only blueprints.
3. Select *New Document Control Blueprint*.
4. Provide the relevant data.
5. Select *Save*.

To create a blueprint from an existing document control

> -ᵔ- Users will need their permissions updated to use this new functionality.

> -ᵔ- You must be the owner of the document control in order to create a blueprint from the document control

1. Navigate to *Document Controls*.
2. Select *More* then select *Promote a to a blueprint*.

To edit a blueprint

> -ᵔ- Users will need their permissions updated to use this new functionality.

1. Navigate to *Document Controls*.
2. Select the *More* then select *Document Control Blueprints*.

   This system filters the *Document Control* view to show only blueprints.
3. Click the blueprint you want to edit.
4. Provide the relevant data.
5. Select *Save*.

To delete a blueprint

> -ᵔ- Users will need their permissions updated to use this new functionality.

1. Navigate to *Document Controls*.

2. Select the *More* and then select *Document Control Blueprints*.

   This system filters the *Document Control* view to show only blueprints.

3. Click the blueprint you want to delete.

4. Select *More* then select *Delete*.

To create a document control from a blueprint

> -Ò- Users will need their permissions updated to use this new functionality

1. Navigate to *Document Controls*.

2. Click *New Document Control*.

3. Select *From Blueprint*.

4. Select the blueprint from which you want to create a document control.

5. Update the relevant information.

6. Select *Save*.

Access a QR code link for a document control

Previously

There were no QR codes available to access document controls.

Now

You have the ability to access a QR code for each individual document control that is open access and has been published and pushed to the repository.

> -Ò- QR codes are only available for document controls that are open access type.

How and where

To print a single QR code

1. Navigate to *Document Controls*.

2. Select the document control for which you want to print a QR code.

3. Click *Full Details*.

4. In the *Downloads* section, in the *External PDF Download URL* area, select *QR Code*.

   A window is displayed with the QR code.

5. Right-click the QR code and select *Print*.

6. Choose your print options.

7. Select *Print*.

To bulk print multiple QR codes

1. Navigate to *Document Controls*.

2. Select *More* then select *Print PDF Download QR Codes*.

3. Select all the document controls for which you want to print QR codes.

4. Select *Next*.

5. Right-click the QR code and select *Print*.

6. Choose your print options.

7. Select *Print*.

Document templates | Business continuity management (BCM) administration

Re-assign and resend element update requests to recipients

Previously

Reassigning document template/BCM Plan Elements or resending the associated emails required re-running the plan schedule.

Now

Reassigning or resending documents can be done directly from the *Elements* grid on a document template.

How and where

To reassign a BCM plan elements

1. From the main menu, select *BCM*.

   Select *BC Plan Template*.

2. Select a business continuity template that is owned by the current user.

3. In the *Elements* section, select an element that is currently assigned to a user by clicking on the pencil icon.

4. The *Element Assignment Management* screen displays. Using the magnifying glass icon select the name of the new user assigned to the document.

5. Select *Reassign*.

To resend element updates

1. From the main menu, select *BCM*.

   Select *BC Plan Template*.

2. Select a business continuity template that is owned by the current user.

3. In the *Elements* section, select an element that is currently assigned to a user by clicking on the pencil icon.

4. The *Element Assignment Management* screen displays. Using the magnifying glass icon select the name of the user to resend the document.

5. Select *Resend Assignment*.

Use tags to automatically create the elements in a document template

Previously

When re-creating a document that contained many elements, for example a Business Continuity Plan (BCP), you had to manually create each area, section, and element, before you could populate them with your information.

Now

When re-creating a document that contained many elements, you can now use tags to automatically create each area, section, and element.

How and where

Add tags to your .docx document before import

1. On your PC, add the tags to your .docx following the *Tag Instructions* below.

2. In the system, from *Document Controls*, select *New Document Control*.

3. Select the document control type.

4. In *File*, select your newly tagged .docx from your PC.

5. Provide the relevant information.

6. Select *Save Changes*. The document is uploaded and ready to convert to a document template.

7. Select *More*, and from the *Document Control* section, select *Convert to Document Template*.

   The system automatically creates the areas, sections, and elements from valid tag pairs in the document template. You can now review the document template and assign elements.

Add tags to an existing .docx document control

1. From *Document Controls*, select the document control for which you need to add tags.

2. Select *Edit File*.

3. Add the tags to your document following the *Tag Instructions* below.

4. Select *Save*.

   The document is ready to convert to a document template.

5. Select *More*, and from the *Document Control* section, select *Convert to Document Template*.

   The system automatically creates the areas, sections, and elements from valid tag pairs in the document template. You can now review the document template and assign elements.

Tag Instructions

> -☼- The below instructions can also be found in the system here:
>
> From the *Document Template Index* screen, select *More*, and in the *File Templates* section, select *View Template Tag Documentation*.

Available tag pairs

You must have both a beginning tag and a paired end tag. Please be mindful of the required order, explained below.

- [AREA] [END AREA]
- [SECTION] [END SECTION]

  > -☼- Both SECTION tag pairs must be contained inside an AREA tag pair.

- [ELEMENT] [END ELEMENT]

  > -☼- Both ELEMENT tag pairs must be contained inside a SECTION tag pair.

This simple example contains all three elements written correctly:

```
[AREA][SECTION][ELEMENT] Your document text. [END ELEMENT][END SECTION][END AREA]
```

Tag Parameters

Opening SECTION and ELEMENT tags may contain two additional (optional) parameters.

The name of the AREA/SECTION/ELEMENT may be specified immediately after the tag name

```
[SECTION Overview]
```

- This will specify the generated section name as "Overview"

- If the name is omitted then it will be auto populated.

For SECTIONs and ELEMENTs an additional option is available to specify the heading.

The syntax for this is:

```
[SECTION Overview, heading: Heading Text]
```

- The above will result in a section named "Overview" with its heading set to "Heading Text".

If the heading needs to be specified but the name should be auto generated then simply use an asterisk in place of the name.

```
[SECTION *, heading: Overview]
```

- This will result in the name being auto populated but the heading will still be set to "Overview".

Full document example:

Figure 1 -

Mail Merge templates administration

Exclude mail merge templates from agent-type users

Now

You can now limit which mail merge templates or letter template sections agent-type users can use.

New fields

New fields on the *Edit Mail Merge Template* screen.

Exclude Agents	Indicates if agent-type users can see and use this mail merge template. • If you want this mail merge template or the letter template section hidden for self-selection for agent-type users , select this field. • If you want agent-type users to use this mail merge template, leave this field empty. For example, when this option is selected, and an agent-type user is on a policy and wants to send a mail merge letter, they will not see this mail merge template on the ***Select Mail Merge Template*** screen. 💡 For existing mail merge letters, the letter template section for this mail merge template is shown as read-only for agent-type users.

How and where

To exclude agent-type users from using a mail merge template

1. At the account or client level, from the main menu, select ***Admin***.

2. In the ***Fields, Labels and Forms*** section, select ***Mail Merge Templates***.

   Select the name of the mail merge template you want to exclude from agent-type users.

3. Select ***Edit Template***.

4. Select ***Exclude Agents***.

5. Select ***Save Changes***.

Policies and billing administration

Apply the late fee charges to PayAsYouGo and pending invoices

Previously

The late fee was only applied to non *PayAsYouGo* invoices.

Now

The late fee is applied to *PayAsYouGo* invoices if they are not paid by their due date. It is also applicable to the invoices in pending status where the policyholder has not reported their payroll for the period thus leaving the invoice in pending status.

How and where

To verify that late fee charges are applied to PayAsYouGo and pending invoices

1. From the main menu, select *Admin*.

2. In the *Policies and Underwriting* section, select *Billing Profiles*.

    Select the name of the profile you want to view.

3. In the *Late Fees* section, ensure the *Enable Late Fees* check box is selected.

    If selected, the system will automatically apply the late fee to *PayAsYouGo* invoices and invoices with a pending payment status.

4. Select *Save Changes*.

Configure a security deposit on a non pay as you go billing frequency

Previously

You could configure a security deposit only if the billing frequency was a PAYG type.

Now

Security deposit can be configured on all billing frequencies.

How and where

1. From the main menu, select *Admin*.

2. In the *Billing* section, select *Billing Profiles*.

3. Select a billing profile.

4. In *Installment Options*, select a billing frequency.

5. In the *Security Deposit Percentage* filed, enter a value.

6. Click **Save Changes**.

   The security deposit information is saved and new proposals will start pulling this information on bind form.

Transfer payment from one billing account to another

We implemented a new feature that allows users to allocate unused amount of a billing account payment to another billing account.

New role permissions

New role permissions in the **Billing Payment** section.

Split Payments	Indicates if this role can allocate unused amount of billing account payment to another billing account.

How and Where

⚙️ **Update the relevant permissions**

1. From the **Main** menu, **Admin**.

2. From the **Users and Security** section, select **Roles**.

3. Select the role to which you want to update permissions.

4. In the **Billing Payment** section, update the **Split Payments** permission.

   > 💡 If you cannot see check boxes on the **Roles** screen, it may be an account-level role. From the **Gear** menu, select **Account:...** then repeat the steps above.

5. In the top right of the **Permissions assigned to Role** section, select **Save Permissions**.

To allocate unused amount to another billing account

> 💡 Users will need their permissions updated to use this new functionality.

1. From the main menu, navigate to **Billing Accounts**.

2. Select a billing account that contains an unallocated payment amoun.

3. Enter a new payment amount and leave a portion of the payment amount unallocated.

4. Select *More* > *Billing Payment* > *Allocate to Other Billing Accounts*.

   The billing account lookup is displayed. The billing account lookup has a locked filter: only accounts using account level billing will be listed.

5. Click on the billing account to which you want to allocate unused payment amount from the billing account in step 3.

   The *Allocation* screen for the billing account displays.

6. In the *Allocate Amount* box, enter the allocation amount.

7. Select *Save Allocations*.

Attach mail merge documents created from a policy change data entry event to a policy

Now

When you have a *Policy Change* domain data entry event (DEE) that creates a mail merge document, you can now automatically attached the newly created document to the parent policy.

New fields

New fields on the *New Action* screen.

> ✓ In the Help Center, navigate to the *New Action screen (DEE)* topic for detailed information.

Attach the merged document to the parent Policy	💡 Available only for data entry events for the *Policy Change* event area.
	Indicates if you want to attach the newly created mail merge document to the parent policy.

"Equity Billing" is now called "Earned Premium Billing"

Previously

The *Default Billing Profiles* screen contained a section named *Equity Billing.*

Now

The *Equity Billing* section has been renamed to *Earned Premium Billing Options*. The existing equity billing feature is more closely aligned with earned premium logic on a policy life-cycle. Origami will soon roll out a new equity billing feature as per industry standard. This rename was required to clear the ambiguity between existing feature and new feature.

How and where

To view the Earned Premium Billing Options section in the Default Billing Profile screen

> 💡 The name change does not modify current system functionality.

1. From the main menu, select *Admin*.
2. In the *Billing* section, select *Billing Profiles*.

    Select a billing profile.

3. Select the *Edit Billing Profile* button.
4. The previously named *Equity Billing Options* section is now named *Earned Premium Billing Options.*

Configure audit type transactions

Previously

When you set up an endorsement as an audit type, the functionality of this type had to be configured by your Origami Service administrator.

Now

You can now set up final audit transactions for policies with certain lines of business. You can also identify which schedules can be modified on a final audit transaction.

When this option is configured, processing final audits is easier and the system now stores the appropriate code for statistical reporting. When a final audit type quote is created from the policy, the following updates are available:

- On the final audit quote, the right panel navigation is limited to only the lines and schedules that have been configured as auditable.
- On the *Quotes* screen, the final audit quote now shows as the type: *Final Audit*.
- On the *Quotes* screen, in the *Filter By* section, you can now filter your quotes by the type: *Final Audit*.

New fields

New field on the *Rating Program* screen, in the *Policy Coverages or Policy Lines* section.

> ✓ In the Help Center, navigate to the *New Rating Program screen* topic for detailed information.

Auditable Policy Lines	Allows you to select which of the rating program policy lines can be audited during an endorsement type that has been configured with *Is Final Audit*. During an audit endorsement transaction, only the policy lines selected will be available to edit (as long as the applicable policy schedules has *Is Auditable* selected.) • Select the field, then select the applicable policy line. You can add another policy line by selecting the field again.

New field on the *Policy Schedule* screen.

> ✓ In the Help Center, navigate to the *Policy Schedule screen* topic for detailed information.

Is Auditable	Indicates if this policy schedule can be edited on the audit policy endorsement. The audit endorsement is usually the final type of endorsement made on a policy. With *Is Auditable* selected, you can edit the policy before the audit endorsement is completed.

How and where

> ✓ If you find this configuration setup difficult, contact your Origami Service administrator.

⚙ **Allow an audit endorsement type transaction to be a final audit**

To enable this functionality, you must first turn on the final audit option on your audit endorsement type.

1. At the account or client level, from the main menu, select *Admin*.

2. In the *Fields, Labels and Forms* section, select *Code Tables*.

3. In the *Search* field, type Endorsement.

4. Select *Endorsement Types*.

5. Select the audit endorsement type.

6. Select *Is Final Audit*.

7. Select *Save Changes*.

⚙ Allow a rating program policy line to be audited during a policy endorsement transaction

Next, decide which rating program policy lines are auditable.

1. At the client level, from the main menu, select *Admin*.

2. In the *Policy and Underwriting* section, select *Rating Programs*.

3. Select the name of the rating program to which you want to add a policy line.

4. Select *Edit Rating Program*.

5. In the *Policy Coverages or Policy Lines* section, select the *Auditable Policy Lines* field.

6. Select an applicable policy line from the drop-down.

7. If you want to select another applicable policy line, click in the *Policy Lines* field again.

8. Select *Save Changes*.

⚙ Allow a rating program schedule to be editable on an audit transaction

Next, decide which rating program schedules should be editable on an audit transaction.

1. At the client level, from the main menu, select *Admin*.

2. In the *Policy and Underwriting* section, select *Rating Programs*.

3. Select the name of the rating program to which you want to add a policy line.

4. In the *Schedule Table Calculations* section, select the schedule table to update.

5. Select *Is Auditable*.

6. Select *Save Changes*.

⚙ Add a new audit type

Finally, define what type of audits are available when a user creates a final audit from a policy.

1. At the account or client level, from the main menu, select *Admin*.

2. In the *Fields, Labels and Forms* section, select *Code Tables*.

3. In the *Search* field, type `Policy Audit`.

4. Select *Policy Audit Types*.

5. Provide the relevant data.

6. Select *+ Add*.

Create a final audit from a policy

> In order to create a final audit type quote from the policy, the following conditions must be met:
>
> - The selected policy line must be included in the **Auditable Policy Lines** field on the rating program.
> - The selected policy schedule must be configured with **Is Auditable**.
> - The selected endorsement type must be configured with **Is Final Audit**.
>
> See the above steps for more information.

1. Navigate to the policy.
2. Select **More**, and from the **Policy** section, select **Create Final Audit**.
3. Provide the relevant data.
4. Select the audit type.
5. Select **Save Changes**.

   The system now creates a new endorsement type proposal. The effective date is automatically filled in with the same date as the policy effective date, and the system will process any changes as of that date.

Configure email notification recipients for asynchronously generated forms

Previously

When your system is set up for asynchronously generated forms, it to allow users to set their database up so that the upon bind/issue, the system will generate the policy, and any invoices immediately, and add a request to our queue to generate the forms in the application server. The user should be able to interact with the issued policy even while the forms are still waiting to be generated.

When the forms are generated, users will get a notification email that the forms are ready, and they will be able to access them from the policy/proposal record. This helped improve the binding/issuing process.

Since you were unable to turn off the automatic email notifications, this process created a lot of overhead for clients that do not need to see the emails.

Now

When this option is activated, user names may be added (separated by a comma) that will not receive the email notifications when forms are generated asynchronously. Assigned users may manually modify the setting to receive email notifications if needed.

> 💡 To enable this feature, contact your Origami Service administrator.

AsyncFormBuildingEmailOptOutUsers	Indicates if the users listed will not received automatic emails notifications when a form has been generated.

How and where

1. From the main menu, select ***Admin***.

2. In the ***Origami Administration*** section, select ***Origami Settings***.

3. Select the ***AsyncFormBuildingEmailOptOutUsers*** setting.

4. In the ***Value*** field enter the user names that will not receive email notifications.

5. Select ***Save Changes***.

To manually configure email notifications on a proposal by proposal basis

1. From the main menu, select ***Underwriting***.

2. Select ***All Proposals***.

   Select a proposal

3. Select ***More*** then select ***Notification Preferences***.

4. Select the ***Email Preferences*** check box.

5. Select ***Save Changes***.

Manage configuration of insufficient funds fee at the billing account level

Related Jira ticket number(s)

ORDEV-36765

Previously

Adding a non sufficient fund(s) fee at the account level was not possible.

Now

The ***Billing Settings*** screen now has a new section, ***Insufficient Funds Fee***. This section allows the user to manage insufficient fund configurations.

New fields

New fields on the ***Billing Settings*** screen.

Enable NFS Fees	Allows users to enable the **Insufficient Funds Fee** section.
Billing Option	Indicates when the insufficient fund charge will be applied. The default value is **None Selected**. The following options are available: • **Next Invoice**: Insufficient fund fee is charged the following invoice. • **Bill Immediately**: Insufficient fund fee is charged in the current invoice.
NSF Fee Type	Indicates the fee type to be charged. The default value is **None Selected**. The following options are available: • **Flat Rate**: A fixed dollar amount will be charged for insufficient funds. • **Custom Script**: A script will be required to determine the dollar amount will be charged for insufficient funds.
NSF Flat Fee	Specifies the dollar amount to be charged for insufficient fees.
Script	Specifies the script to be used for the dollar amount to be charged for insufficient fees.

How and where

To configure the Insufficient Funds Fee section

1. From the main menu, select **Admin**.

2. In the **Billing** section, select **Billing Settings**.

3. In the **Insufficient Funds Fee** section, select the **Enable NFS Fees** check box to enable the section.

4. In the **Billing Options** drop-down, select when the insufficient fund fee will be charged.

5. In the **NSF Fee Type** drop-down, select the type of charge.

   If **Flat Rate** is selected, enter the dollar amount in the field.

   If **Custom Script** is selected, a script must be entered in the **Script** field.

6. Select **Save Settings**.

Select when reinstate fees will be charged

Related Jira ticket number(s)

ORDEV-36482

Previously

The *Billing Option* field was not available to the end user to select in the *Reinstatement Fees* section of the *Billing Profile* screen.

Now

Upon selecting the *Enable Reinstatement Fees* check box, the *Billing Option* field displays. This field allows the end user to select when the reinstate fees will be charged.

New fields

New fields on the *Billing Profile* screen.

Billing Option	Allows you to select when the reinstatement fee will be paid. The default value is ***Next Invoice***. The following options are available: • ***Next Invoice***: Indicates the reinstatement fee will be charged with the following invoice • ***Bill Immediately***: Indicates the reinstatement fee will be charged in the current invoice.

How and where

1. From the main menu, select *Admin*.

2. In the *Policies and Underwriting* section, select *Billing Profiles*.

   Select the profile you want to edit.

3. The profile opens. Select the *Edit Billing Profiles* button.

4. In the *Reinstatement Fees* section, select the *Enable Reinstatement Fees* check box.

5. The *Billing Option* drop-down selection displays.

6. Make a selection and select *Save Changes*.

Rating programs administration

Use variables in scripting of rating formula column definitions

Previously

You could not create a shared variable at the rating formula level. The variable has to be set and repeated for each rating formula column, which caused redundancies.

Now

You can now add a shared rating formula variable that will work mostly like any other rating formula column. The only difference is that for rating formula variables, you do not need a new field since the results do not need to be written back to the domain table. This reduces the number of needed fields and reduces redundancy in scripting variables within each rating formula column.

For example, you can create a rating formula variable at the coverage level. Then any other fields in the same coverage can also use the new variable.

> 💡 Formulas and their calculations are available within in the rating logs.
>
> Rating formula variable values do not render in rating worksheets.

New buttons

New button on the ***Rating Formula Column*** screen.

Add Variable	Allows you to add a shared rating formula variable that works the same as a rating formula. For example, you can create a rating formula variable at the coverage level. Then any other fields in the same coverage can also use the new variable. > 💡 Required naming conventions of a rating formula variable: > - Must start with $ (The $ sign will be automatically added when you save.) > - Must start with a letter (after the $). > - Must be at least 4 characters in length (including the $). > - Must not contain any spaces or special characters other than underscore '_'.

How and where

Create a shared rating formula variable

1. At the client level, from the main menu, select ***Admin***.

2. In the ***Policy and Underwriting*** section, select ***Rating program***.

3. Select the rating program for which you want to add a variable.

4. In the ***Rating Calculation Formulas*** section, select the ***Rating Formula*** column.

5. At the bottom of the screen, select ***Add Variable***.

6. Provide the relevant data.

7. Select ***Save Column***.

Refer to a rating formula variable

You can refer to a rating formula variable the same way you refer to a rating formula column.

Examples:

- Within a formula:

```
getColumn("$VarA")
getModelColumn ("Policy", "$VarB")
```

- Within a simple math expression:

```
{$VarA} + {$VarB}
```

Endorse bound renewals when binding an endorsement

Now

You can now allow new endorsements to also endorse bound renewals on in-force policies.

When this option is activated and you bind an endorsement, you can now do one of the following on in-force policies:

- Have the bound endorsement impact the policy and create a pending endorsement with the same update on subsequent bound renewals.

  > 💡 When creating pending endorsements on subsequent policies, you will need to navigate to the policy to accept/bind the endorsement manually. The system then runs the underwriting rules and calculates premium changes.

- Have the bound endorsement only impact the original policy.

New fields

New fields on the *New Rating Program* screen.

  > ✓ In the Help Center, navigate to the *New Rating Program screen* topic for detailed information.

Allow Cross-Term Endorsements	Allows a new endorsement to also endorse bound renewals on in-force policies. After you enable this setting, an option displays after a user binds an endorsement. The user can then decide if the new bound endorsement impacts just the policy or if it also impacts subsequent bound renewals. • If you want to allow new endorsements to also endorse bound renewals, select this check box.

How and where

⚙ **To allow users to endorse bound renewals when binding an endorsement**

1. From the main menu, select *Admin*.
2. In the *Policies and Underwriting* section, select *Rating Programs*.
3. From the list, select the rating program you want to edit.
4. Select *Allow Cross-Term Endorsements*.

To endorse bound renewals when binding an endorsement

> 💡 The policy must have an active renewal policy.

1. Navigate to the policy that has a bound renewal and needs endorsed.
2. Do one of the following:
   • Make a policy change that leads to an endorsement.
   • Select *More*, and in the *Policy* section, select *Create Endorsement*.
3. Select *Bind Endorsement*.
4. To have the bound endorsement create a pending endorsement on subsequent bound renewals, in the *Active Renewal Handling* section, select *Automatically apply changes to renewal endorsement*.

The system creates similar policy changes for the renewal policy, creates an endorsement (if there is not an active one already), and then applies the changes to the endorsement.

Select the Tail Adjusted Value easier

Previously

When creating or editing calculations in a rating program, and you have multiple fields using the same field label, it was difficult to select the field in which you want to store the adjusted value of the premium from the *Tail adjusted Value* drop-down.

For example, if you had the field label *New Written Premium* on three different fields, the drop-down shows *New Written Premium* three times in the list, as shown below. This made it difficult to know which one to select.
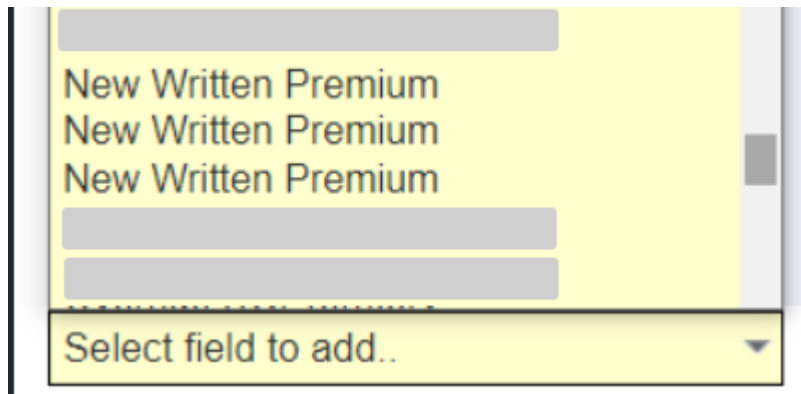
Now

The *Tail adjusted Value* drop-down now shows the field label with the field name in parenthesis.

For example, if you had the field label *New Written Premium* on three different fields, the drop-down now shows the three duplicate *New Written Premium* field labels with the field name in parenthesis, as shown below.
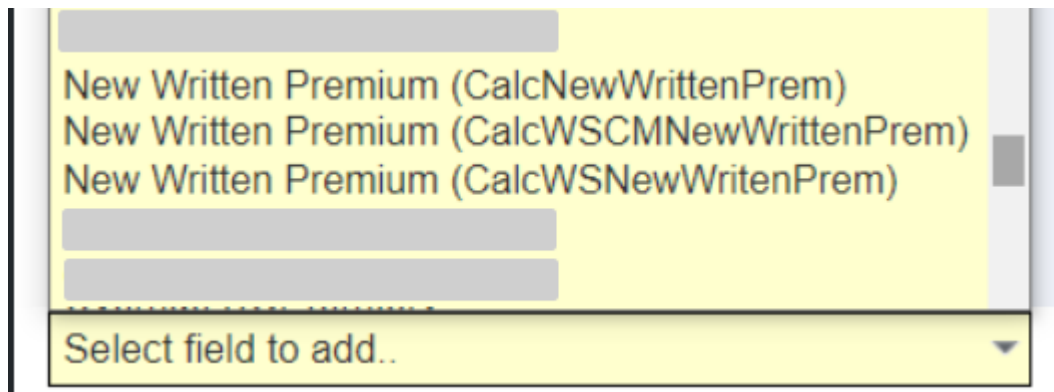
Updated Fields

Updated field on the *Rating program calculation fields* screen.

In the Help Center, navigate to the **Rating program calculation fields screen** topic for detailed information.

Tail Adjusted Field Value	Only available when **Use Tail Equation** is selected.
	Allows you to select the field in which you want to store the adjusted value of the premium when using the tail equation.
	• If you want to add a field, from the drop-down, select the field from the drop-down.
	If there are duplicate field labels in the drop-down, the field name is displayed in parenthesis after the field label.

How and where

1. At the client level, from the main menu, select **Admin**.

2. In the **Policy and Underwriting** section, select **Rating Programs**.

3. Select the rating program for which you want to edit the tail adjusted value.

4. Select **Edit Rating program**.

5. Select **Use Tail Equation**.

6. In the **Tail Adjusted Value** field, select the field in which you want to store the adjusted value of the premium when using the tail equation.

   This drop-down now shows the field label with the field name in parentheses.

7. Select **Save Changes**.

Use the new shared commission workflow

Previously

The **Split Commission Percentage** field was used to split the commission between two agencies or brokers.

Now

A new shared commission workflow allows the user to easily configure and distribute the commission to each agency or broker on the policy. There are new shared commission percentage fields available on the commission profile which can be used to set up commission percentage which will be used if both primary and secondary agency are available on the

policy. Origami will fetch the shared commission percentage value from the associated commission profile. If the fields are blank, then the user still has the ability to enter a commission percentage for each agency or broker on the proposal.

How and where

To configure the shared commission percentage

1. From the main menu, select *Admin*.

2. On the *Policies and Underwriting* section, select *Commission Profiles*. Select a commission profile.

3. Select a *Base Commission* from the *Commission Threshold* section.

4. Select *Edit Commission Threshold*.

5. Enter the shared percentage value in the fields in the *Shared Commissions* section.

6. Select *Save Changes*.

7. The shared percentage values display on the *Commission Thresholds* section for the threshold type selected.

Sharing commission percentage in a new application

1. From the main menu, select *Policy Admin*.

2. Select *New Application*.

3. Select an active rating program and complete the application interview (proposal).

4. When completed, the *Policy Detail* section is displayed with the commission percentages depending on the agency or broker quantity.

User assignment administration

Create user assignments and user assignment data entry events for any domain

Previously

User assignments had to be enabled by your Origami Service administrator, and the grids could not be configured. You also could only create user assignments and user assignment data entry events for a limited number of domains.

Now

You can now create, edit and delete user assignments for all domains. To enforce proper security, every domain now contains three new user assignment role permissions.

You can now also add the *User Assignments* section/grid to any custom form or add the *User Assignments* section/grid to a group panel on any custom form.

Additionally, the **New User Assignment** data entry event action is now available on every domain, so you can dynamically create assignments wherever you want in the system.

New role permissions

New role permissions in all domain sections.

User Assignments - View	Indicates if this role can see the User Assignment grids on screens for this domain.
User Assignments - Add	Indicates if this role can create and edit user assignments for this domain.
User Assignments - Delete	Indicates if this role can delete user assignments from this domain.

How and Where

To update the relevant permissions

1. At the account or client level, from the **Main** menu, select **Admin**.

2. From the **Users and Security** section, select **Roles**.

3. Select **Apply Filter to Area Names selected** and then search for the domain name.

4. In the domain section, update the **User Assignments- View**, **User Assignments- Add** and **User Assignments- Delete** permissions, as needed.

5. In the top right of the **Permissions assigned to Role** section, select **Save Permissions**.

To add the assignment panel as a single grid to any custom form

1. At the account or client level, from the main menu, select **Admin**.

2. In the **Fields, Labels and Forms** section, select **Custom Forms**.

3. Select the form set that contains the form for which you want to edit.

4. Open the custom form's **View** or **Edit** form.

5. To add a single grid, add the **userAssignmentPanel** XML element to the form.

> ⊘ **Review** and **Edit Access** assignments are available for every domain.

6. On the **userAssignmentPanel**, fill in the **Type** attribute. This defines the type of assignment shown/created from that grid.

7. Provide any other relevant values.

8. To see detailed information on all available attributes, from the right side panel, in the *Form Help* section, select *Go to XML Syntax Help*.

   The *Help on Forms XML* mini-help guide is displayed.

9. Select *Save Changes*.

To add the assignment panel to a group panel on any custom form

The group panel allows you to add multiple assignments grids together, while also including the *Team Assignments* and *Assignment Schedules* grids.

> 💡 The *Team Assignments* and *Assignment Schedules* grids can only be added to a custom form using a group panel.

1. At the account or client level, from the main menu, select *Admin*.

2. In the *Fields, Labels and Forms* section, select *Custom Forms*.

3. Select the form set that contains the form for which you want to edit.

4. Open the custom form's *View* or *Edit* form.

5. To add a group panel, add the *userAssignmentGroupPanel* XML element to the form.

6. In between the opening and closing tags of the *userAssignmentGroupPanel*, add as many *userAssignmentPanels* as desired.

   > ✓ *Review* and *Edit Access* assignments are available for every domain.

7. To add the *Team Assignments* and *Assignment Schedules* grids, add the following group panel attributes: *showTeamGrid* and *showScheduleGrid*.

8. Provide any other relevant values.

9. To see detailed information on all available attributes, from the right side panel, in the *Form Help* section, select *Go to XML Syntax Help*.

   The *Help on Forms XML* mini-help guide is displayed.

10. Select *Save Changes*.

To create a user assignment data entry event action

1. At the account or client level, 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. In the area list, select the area.

5. Provide the relevant data.

6. Select *Save Changes*.

7. In the *Actions Triggered by Event* section, on the right side, select *Create a new action*.

8. Select *New User Assignment*.

9. Provide the relevant data.

10. Select *Save Changes*.

Define a tag for user assignment schedules

Previously

It was not possible to specify tags on a user assignment when creating a schedule.

Now

When creating a user assignment schedule, you can use the new *Tag* field to define a tag. All scheduled assignments created from this user assignment will have this tag.

New fields

New fields on the *New Schedule* screen.

Tag	Defines the tag you want to add to all scheduled assignments created from the corresponding user assignment.

How and where

> 💡 To use this feature, access schedules must be added to the corresponding domain. You can add access schedules through configuration.

1. From the main menu, navigate to the domain for which you want to define the tag for user assignment schedules.

2. Select *New*.

3. Complete necessary steps and upload a file.

4. Upload a file.

5. Select *Save Changes*.

6. In the *Access Schedules* section, select *New Schedule*.

   The *New Schedule* screen displays.

7. In the *Tag* field, enter the text you want to use for the tag.

8. Select *Save Schedule*.

Create different review workflows and configurations by domain

Previously

Review assignment actions could only be configured by domain.

Now

When this option is enabled, a domain can have different review workflows and configurations.

> To use this feature, contact your Origami Service administrator.

Configure the user assignment status description

Previously

User assignments always showed the same status descriptions regardless of domain or tag. This meant that a status description did not match the preferred nomenclature for that particular use case.

Now

When this option is enabled, the status descriptions for user assignments can now be configured based on domain, assignment type and assignment tag in that hierarchy level. This means if a description set is for a domain, it will apply to all assignments that do not have their own description override set.

> To use this feature, contact your Origami Service administrator.

System users

System-wide

Associated child records can now be included when copying CDE records

Previously

The CDE records could be copied, but it only copied the form data and did not copy any associated records, such as tasks, notes, emails, contacts, files, etc.

Now

The CDE copy method has been enhanced to allow copying the form data, as well as any associated (child) records. The new method will copy the form data and provide check boxes at the top of the form to also copy any tasks, notes, emails, contacts, files, or related CDEs.

> 💡 This will not copy child records attached to the children.

How and where

To copy a CDE record

1. From the main menu, select a CDE.

2. Select a record.

3. On the record view form, select **More** then select **Copy**...

4. The available copy record check boxes display. Select the record(s) to be copied.

5. Select **Save Changes**.

⚙️ **To copy a CDE record from Admin**

1. From the main menu, select **Admin**.

2. In the **Client Defined Entity Administration** section, select a CDE.

> The process applies to all the categories under **Client Defined Entity Administration**.
>
> For example, **JSAs, Support Requests, Building Facilities,** etc.

3. Select a record.

4. On the record view form, select the ***More***, and ***Copy...***

> The ***Copy*** option name will vary depending on the section

5. The available copy record check boxes display. Select the record(s) to be copied.

6. Select ***Save Changes***.

Use type-ahead suggestions in the "Team" field

Previously

Throughout the system, in a ***Team*** box, when looking up a team, the system did not suggest a team based on text as you typed.

Now

Throughout the system, in a ***Team*** box, when looking up a team, the system now suggests a team based on text as you type. For example, if the team you want to assign starts with "An", in the ***Team*** box, type An and a list will appear with teams that start with "An." From the list, select the correct team to assign.

Claims

Apply the valuation date directly on the claims index screen

Previously

You could only prior valuate claim data using reports.

Now

You can now also prior valuate claim data on the ***Claims*** index page using the new ***Prior Valuation*** filter option.

Valuation date is also available on custom views. If you save the current claim view, you will now see ***Prior Valuation date*** on the custom view form. This field will be saved with your custom view, and any time you select that view, the valuation date will be applied to the results and display the valuation date at the top of the index page.

New fields

New filter option at the top of the ***Claim*** index screen.

Prior Valuation	Allows users to prior valuate claim data.

New field on the ***Save the Current View*** screen.

Prior Valuation Date	Allows users to prior valuate claim data in the custom view.

How and where

Apply valuation in the Claims screen

1. From the main menu, select *Claims*.

2. At the top of the *Claims* index screen, in the filter options, select *Prior Valuation*.

3. Select the calendar icon and then select the relevant options for the valuation date.

4. Select the magnifying glass icon.

   The system performs the valuation and displays the claim results as of the date you selected.

Apply valuation in custom view

1. Complete the above steps to apply valuation in the *Claims* screen.

2. Click *Save*.

   The *Save the current view* screen is displayed with the *Prior Valuation Date* field pre-populated with the valuation date selected in step 3 above.

3. Provide the relevant data.

4. Click *Save View*.

   Anytime you use this custom view, the system will apply the valuation date to the results and display the valuation date at the top of the *Claims* screen.

> If you add the custom view to a dashboard, the system will retain the valuation date and show the data as of the valuation date selected in the custom view.
>
> However, if you use the custom view as a filter on the dashboard or report, the system will not retain the valuation date. The system will only apply the view filter and not the valuation date.
>
> To add the custom view to a dashboard, in the Claims screen, click *Add to Dashboard*.

Policies and billing

Allocate account level payments to itemized policy invoice line items

Previously

You could not allocate an itemized bill payment.

Now

You can allocate a billing payment manually to policy transactions associated to a policy invoice which is billed under account bill. This is particularly useful in scenarios where a billing account invoice is underpaid.

On the *Payment Allocation* form, a new option to expand the invoice grid panel gives user the ability to allocate the payment to each premium line item/ policy transaction.

How and where

1. From the main menu, navigate to *Billing Accounts*.

2. Select the billing account for which you want to view the itemized invoice.

3. Select *New Billing Payment*..

4. On the *New Billing Payment* screen provide the relevant data and select *Save Changes*.

5. Select *Allocate Payment.*

6. On the *Allocate Billing Invoices* screen, select *Allocate to Policy Transactions*.

7. Select an invoice to view. The invoice will display an itemized view in the grid panel.

8. To return to a non-itemized invoice view, select *Switch to Default Allocation*.

Move a policy from account level to policy billing

Now

You can now remove a policy from a billing account. All future pending receivables of the policy are removed from the billing account and are billed at the policy level. The billing account will still keep the legacy information such as all fully paid invoice line items and payment details which were allocated to pay off the line items related to the removed policy.

How and where

1. From the main menu, navigate to *Billing Accounts*.

2. Select a billing account.

3. Select *More* and in the *Policies* section, select *Remove Policy Billing from Billing Account*.

4. The *Remove Policy* screen displays.

5. For the policy you want to remove from the account, select the red X icon.

    The preview screen displays.

6. Review the changes.

7. Select *Remove Policy*.

Cancel and re-invoice an unpaid billing invoice when switching back to policy bill

Now

When you remove a policy from a billing account (by changing the billing level from account bill to policy bill), if there is an unpaid invoiced/issued transaction of this policy, then that transaction will be credited and canceled. On the policy, the affected transaction will be canceled and re-invoiced directly to the policy holder.

How and where

1. From the main menu, navigate to *Billing Accounts*.

2. Select a billing account with one or more policies billed under it.

3. Select *More* and in the *Policies* section, select *Remove Policy Billing from Billing Account*.

    The Remove Policy screen is displayed.

4. For the policy you want to remove from the account, select the red X icon.

    The *Preview* screen displays the issued and unpaid invoice with a note that the invoice will be credited.

5. Review the changes.

6. Select *Remove Policy*.

Create an audit payment plan post bind

Previously

Payment plan cannot be modified after the audit was bound.

Now

After the audit has been bound, the audit invoice can be broken into multiple monthly installments to create a new payment schedule for audited premium. The due date of the first installment can also be defined by the user while creating the payment schedule.

How and where

1. Search for a canceled or expired policy.

2. Create an audit endorsement.

3. On the *Bind* screen, select *Generate a bill for the insured* to create a single invoice and bind the endorsement.

4. Navigate to the policy, in the *Premium Invoices* section, select the invoice created by the endorsement.

5. Select *More*,and in the *Insured Transactions* section, select *Split into Payment Plan*.

    The *Split Invoice Into Monthly Payment Plan* screen is displayed.

6. In the *Number of Installments* box, enter the number of installments.

7. In the *First Due Date* box, select the date the first invoice is due.

8. Select *Save*.

Change insured name in proposal or canceled policy

Previously

A member name cannot be changed when copying a proposal or in a cancel/rewrite scenario. This caused issues as many times when users are copying a proposal or canceling/rewriting the policy, the policy is moving to a new insured.

Now

Users will have the ability to change the insured on the proposal through a copy or cancel/rewrite.

How and where

To change a name on a canceled policy

1. Go to the canceled policy that will be modified with a new insured.

2. Select *More*, then select *Copy to Rewrite Quote*.

3. The *New Quote* screen is displayed.

4. The *Insured* field is now editable by typing in a new insured name or by a search using the magnifying glass icon to select a new insured name.

5. Select *Save Changes*.

To change a name on a quote

1. From the main menu, select *Policy Admin* drop-down then select *All Quotes*.

2. Go to the proposal (quote) that will be modified with a new insured.

3. Select *More* and then select *Copy Proposal*.

4. The **New Quote** screen is displayed.

5. The **Insured** field is now editable by typing in a new insured name or by a search using the magnifying glass icon to select a new insured name.

6. Select **Save Changes**.

Regenerate auto policy form packets on bound proposals

Previously

There could be times when erroneous behavior could have been captured within a bound policy packet that was generated via Auto Policy Forms. This could be due to a bug in the system or a bug in one of the forms set up that needed to be corrected. There was no way to regenerate that auto policy form though in a way that would pick up the corrected status of the forms.

Now

Users with a **Regenerate Forms** permission role in the **Quote** domain will be able to regenerate the auto policy form generated file(s) with a **Regenerate Policy Forms** link.

This link will bring the user to a screen which displays a list of files attached to this proposal which were generated and created a `LetterTemplateTagHash` record. The list indicates the user that by regenerating the forms, these files will get replaced with the regenerated forms. If there were files attached where there was not a `LetterTemplateTagHash` record created, there could be potential for duplicate files that they will have to review. The user does have an option at this point to indicate to the system to not delete the existing. In this case the newly regenerated files would be attached to the issued quote or proposal along with any of the existing files

How and where

To regenerate a policy form

1. From the main menu, select **Underwriting** then select **All Proposals**.

2. Select a bound proposal.

3. Select **More**, and in the **Forms and Letters** section, select **Regenerate Policy Forms**.

4. The **Regenerate Policy Forms** screen displays with the files attached to the form.

   See detailed instructions above.

5. If the user does not want to delete existing files, select the **Do not delete existing file** check box (this might cause duplicate files).

6. Select **Regenerate**.

7. Once the **Regenerate** button is clicked, the system will regenerate (and attach new/replace as selected) the Auto Policy Forms for the bound quote that it is triggered

from, as well as all subsequent proposals that were already bound at that time

8. The user will receive an email when the files have regenerated and attached.

The premium line items section now displays on an account level invoice

Previously

A billing invoice does not have premium line item details. The invoice only had policy summary and the policy invoices listed as line items.

Now

A billing invoice now has a new *Policy Transactions* section that displays all the premium line items of the associated policy invoices under the selected billing invoice.

New fields

New fields on the *Invoice Policy Summary* screen.

Policy Transactions	Displays all the premium line items of the associated policy invoices under the selected billing invoice.

How and where

1. From the main menu, navigate to *Billing Accounts*.

2. Select a billing account.

3. In *Active Billing invoices* section, select a billing invoice.

   The billing invoice is displayed in the view mode.

4. Scroll to the *Policy Transactions* section.

   The system displays the all the premium line items of the associated policy invoices under the selected billing invoice.

View the status of forms on a proposal

Previously

There was no single place to view the status of forms from one proposal to another. This made it difficult to track if a form was attached to a policy or know if the form was modified.

Now

For each proposal record, you can now see if the forms were added, deleted, or have no change.

How and where

> To access this feature, the proposal must have had auto policy forms generated. For example, the proposal was bound, auto policy forms was ran, and records were generated within the **LetterTemplateTagHashes** table.

1. Open the proposal for which you want to view the status of forms.

2. Select **More**,and in the **Forms and Letters** section, select **Current Policy Forms**.

   The Current Proposal Forms screen is displayed.

   The following statuses of the forms are displayed.

   - Added
   - Deleted
   - No Change