



# ORIGAMI RISK

**July 2023**

**Client Release Notes**

**Disclaimer**

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

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# July 2023 Client release notes

## What's new?

### New modules

#### Employee health case

##### Why

To easily track health requirements, treatments and followup steps when an employee is injured at work.

##### Previously

CDEs had to be created to track this information.

##### New solution



Employee health case is included in the **Employee Health** solution.  
See your Origami Service representative for more information.

With this solution, you can now create an employee health case that links to an incident and a workers compensation claim. The employee health case can track follow-up tasks and use time tracking, when management of the employee health case is done by a third party. You can create workflows for employee health cases, for example, to send communications, create follow-up actions, and monitor the progress of the case. You can also assign an **EH Case Owner**.

Employee health cases track:

- Employee details
- Vaccination records for the employee
- Testings and screenings records for the employee
- Past incidents that the employee has been involved in
- Past claims that the employee has been involved in



Employee health case functionality requires new user permissions.

**New user permissions**

These new role permissions are in the **Employee Health Case** section.

Employee Health Case					
<input checked="" type="checkbox"/>	<input type="checkbox"/> Bulk Action - Add New Note	<input type="checkbox"/> Bulk Action - Delete	<input type="checkbox"/> Bulk Action - Events	<input type="checkbox"/> Bulk Action - Printable Abstracts	<input type="checkbox"/> Bulk Action - Send Email Template
	<input type="checkbox"/> Bulk Action - Update Field Values	<input type="checkbox"/> Contacts - Attach	<input type="checkbox"/> Contacts - Detach	<input type="checkbox"/> Create	<input type="checkbox"/> Delete
	<input type="checkbox"/> Edit	<input type="checkbox"/> Emails - Delete	<input type="checkbox"/> Emails - Send and Edit	<input type="checkbox"/> Emails - View	<input type="checkbox"/> Export From Grid
	<input type="checkbox"/> Files - Attach	<input type="checkbox"/> Files - Delete	<input type="checkbox"/> Files - Modify	<input type="checkbox"/> Files - View	<input type="checkbox"/> Import Data
	<input type="checkbox"/> Lookup	<input type="checkbox"/> Manage External Access	<input type="checkbox"/> Notes - Add	<input type="checkbox"/> Notes - View	<input type="checkbox"/> Tasks
	<input type="checkbox"/> View				

**Users in this solution**

<b><i>EH Case Owner</i></b> (users)	<ul style="list-style-type: none"> <li>• Initiates the employee health case</li> <li>• Tracks the overall progress of the employee health case</li> </ul>
-------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------

The new **Employee Health Case** screen:

**New Employee Health Case**
Save Changes Cancel

---

**Employee Health Case Details:**

EH Case Number:  Empty to autogenerate

EH Case Status:

Open Date:

Date Assigned:


Close Date:

EH Case Owner:

Employee:

Show Contact Information:

**Please provide a detailed description of the case.**



---

**Incident Illness Details:**

Related to a recent incident/illness?

Incident:

Incident Subtype:


EH Case Location:

Supervisor Informed:

Did employee see a doctor about the injury/illness:

Type of Other Issue:

**Description of Injury, Illness or Other Concern**



---

**Claim Details:**

Claim:

---

**Follow-up Actions**

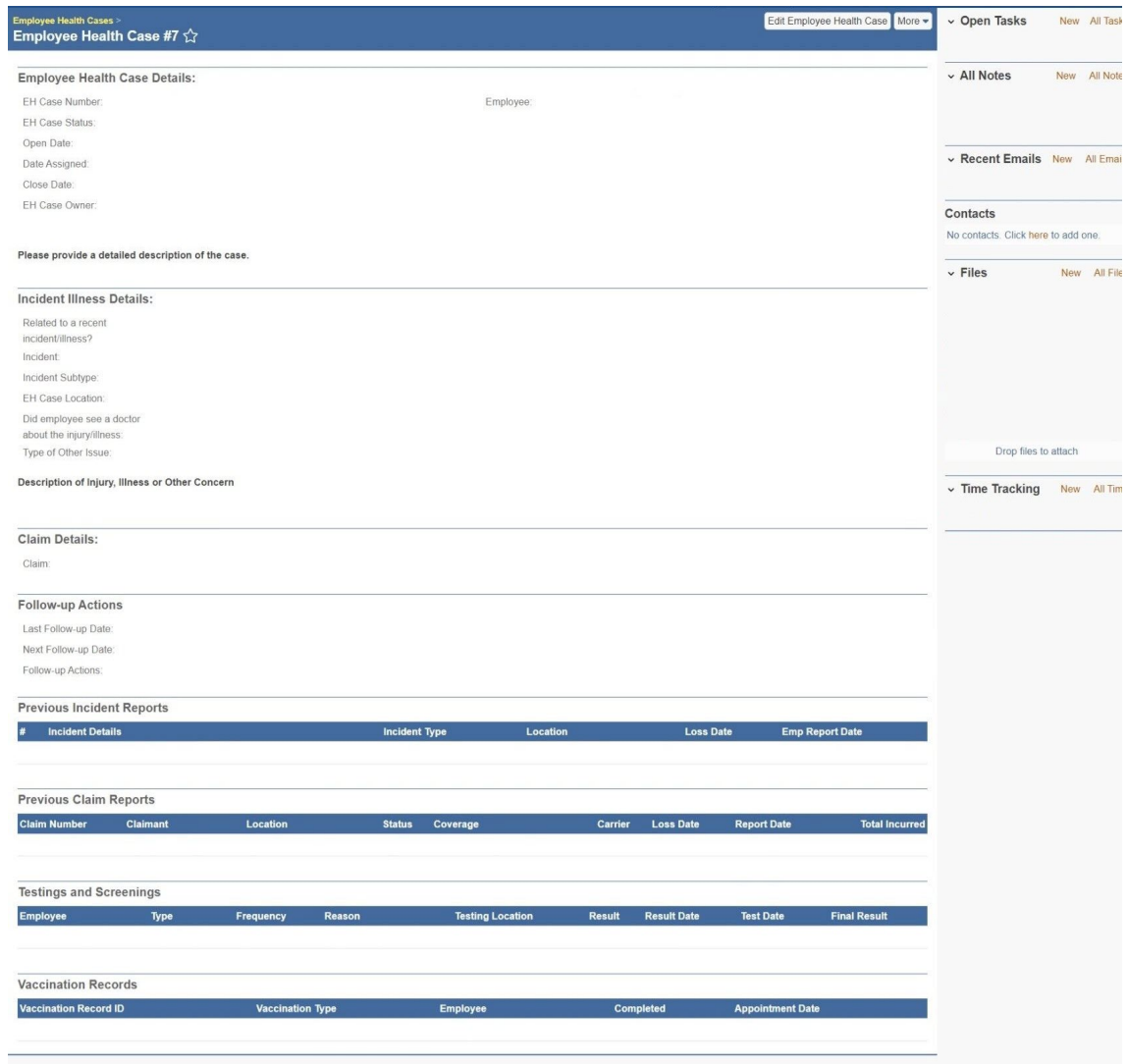
Last Follow-up Date:

Next Follow-up Date:

Follow-up Actions:

<input type="checkbox"/> Case Review	<input type="checkbox"/> Leave	<input type="checkbox"/> Restricted duty	<input type="checkbox"/> Treatment program/course
<input type="checkbox"/> Consult	<input type="checkbox"/> Monitor	<input type="checkbox"/> Specialist	<input type="checkbox"/> IME
<input type="checkbox"/> Counseling	<input type="checkbox"/> No follow-up actions, close case	<input type="checkbox"/> Therapy treatment	
<input type="checkbox"/> Doctor appointment	<input type="checkbox"/> Refer for immediate treatment		

The edit **Employee Health Case** screen:



**Employee Health Case #7** ☆ Edit Employee Health Case More

**Employee Health Case Details:**  
 EH Case Number: \_\_\_\_\_ Employee: \_\_\_\_\_  
 EH Case Status: \_\_\_\_\_  
 Open Date: \_\_\_\_\_  
 Date Assigned: \_\_\_\_\_  
 Close Date: \_\_\_\_\_  
 EH Case Owner: \_\_\_\_\_

Please provide a detailed description of the case.

**Incident Illness Details:**  
 Related to a recent incident/illness?  
 Incident:  
 Incident Subtype:  
 EH Case Location:  
 Did employee see a doctor about the injury/illness?  
 Type of Other Issue:

Description of Injury, Illness or Other Concern

**Claim Details:**  
 Claim:

**Follow-up Actions**  
 Last Follow-up Date:  
 Next Follow-up Date:  
 Follow-up Actions:

**Previous Incident Reports**

#	Incident Details	Incident Type	Location	Loss Date	Emp Report Date

**Previous Claim Reports**

Claim Number	Claimant	Location	Status	Coverage	Carrier	Loss Date	Report Date	Total Incurred

**Testings and Screenings**

Employee	Type	Frequency	Reason	Testing Location	Result	Result Date	Test Date	Final Result

**Vaccination Records**

Vaccination Record ID	Vaccination Type	Employee	Completed	Appointment Date

**Open Tasks** New All Task

**All Notes** New All Note

**Recent Emails** New All Email

**Contacts**  
 No contacts. [Click here to add one.](#)

**Files** New All File

Drop files to attach

**Time Tracking** New All Time

## User assignment portals

### Why

An easy way to view and work through all of your user assignments, no email address needed.

### Previously

You could only access individual user assignments through emails sent by data entry events (DEEs). You could not view all your assigned actions together.



### New solution

The user assignment portal contains all user assignments for a user. Both internal and external users can use the portal. External users must log in to the user assignment portal using pre-defined log-in credentials, for example, the employee number and name.

User assignment portals can be managed at the client level in **Admin > User Assignment Portals**.



Managing and accessing user assignment portals require new user permissions.


### New user permissions

This new permission is in the **Administration - Account** section.

<b>Manage User Assignment Portals</b>	Indicates if the administrator can access the screens in <b>Admin &gt; User Assignment Portals</b> .
---------------------------------------	------------------------------------------------------------------------------------------------------


This new permission is in the **User Assignments** section.

<b>Access user Assignment Portals</b>	Indicates if the user can access the user assignment screens to manage their user assignments.
---------------------------------------	------------------------------------------------------------------------------------------------






If you do not select this option, users will still be able to access each user assignment from the emails sent from DEEs.

**New screens**

<b><i>New/Edit User Assignment Portal</i></b> screen	The <b><i>New/Edit User Assignment Portal</i></b> screen allows you to create and edit user assignment portals for external users, which are employees and contacts in the system. Each portal can generate two QR code links, used for completing the user assignments.
<b><i>View User Assignment Portal</i></b> screen	The <b><i>View User Assignment Portal</i></b> screen allows you to view the setup information for the user assignment portal. On this screen, you can also see the optional QR codes.
<div style="border: 1px solid #007bff; border-radius: 10px; padding: 10px; display: inline-block;">                  QR codes are displayed when you complete the <b><i>Validation Fields</i></b> and <b><i>External Access Type</i></b> fields on the <b><i>New/Edit User Assignment Portal</i></b> screen.             </div>	
<b><i>User Assignment Portals List</i></b> screen	The <b><i>User Assignment Portals List</i></b> screen shows a list of all user assignment portals created. The portal with the star icon selected is used as the default portal by internal users. <ul style="list-style-type: none"> <li>To set a portal as the default for internal users, select the star icon next to the portal name.</li> </ul>
<b><i>User Assignments</i></b> screen	The <b><i>User Assignments</i></b> screen shows a filtered list of assigned actions for the current user. Actions are listed in the domain sections, for example, document control assignments are listed in the <b><i>Document Controls</i></b> section. <ul style="list-style-type: none"> <li>To access this screen as an internal user, use your standard log-in information for our system. After logging in, you can also use the internal QR code (copied from the <b><i>View User Assignment Portal</i></b> screen) to go directly to this screen.</li> <li>To access this screen as an external user, use the external QR code (copied from the <b><i>View User Assignment Portal</i></b> screen) and log in using the pre-defined log-in credentials.</li> <li>To complete an action, select the relevant item, to navigate to that action's screen. After you complete the action, you return to the <b><i>User Assignments</i></b> screen to continue working on your assignments.</li> </ul>
<b><i>User Assignments Portal Log in</i></b> screen	The <b><i>User Assignments Portal Log in</i></b> screen allows you to enter the required log-in credentials needed to access the user's <b><i>User Assignments</i></b> screen. <ul style="list-style-type: none"> <li>To access this screen, external users use the external QR code (copied from the <b><i>View User Assignment Portal</i></b> screen).</li> </ul>

**Fields**

 Fields on the ***New/Edit/View User Assignment Portal*** screen.

<b>Name</b>	The name of the external user assignment portal.
<b>Description</b>	The description of the external user assignment portal.
<b>Validation Fields</b>	<div style="border: 1px solid #007bff; border-radius: 5px; padding: 5px; margin-bottom: 10px;">  Required for external portal access.                 </div> <p>Determines the fields used by an external employee or contact in the system to log in to their user assignment portal.</p>
<b>External Access Type</b>	<div style="border: 1px solid #007bff; border-radius: 5px; padding: 5px; margin-bottom: 10px;">  Required for external portal access.                 </div> <p>Determines the access type used for logging in to the external user assignment portal.</p> <div style="margin-top: 10px;">  The items in this drop-down are configured in <b>Admin &gt; External Access</b>, and include only active external access types for the <code>UserAssignmentPortal</code> domain.                 </div>
<b>Allowed Domains</b>	<p>Determines the domain sections that can be shown on the <b>User Assignments</b> screen. Domains sections are only displayed if the user currently has an action assigned from that domain.</p> <ul style="list-style-type: none"> <li>To show all domains that have user assignments, leave this field blank.</li> </ul>
<b>Allowed Types</b>	<p>Determines the user assignment types shown on the <b>User Assignments</b> screen.</p> <ul style="list-style-type: none"> <li>To show all user assignment types, leave this field blank.</li> </ul>
<b>Advanced Filter</b>	Determines the records shown on the <b>User Assignments</b> screen.

## Administration screens

The **New/Edit User Assignment Portal** screen:

**Administration > User Assignment Portals >>** Save Changes Cancel

### New User Assignment Portal

**Name: \***

Description:

**Is Active: \***

Validation Fields: ⓘ

External Access

Type: ⓘ

**i** **Allowed Domains** and **Allowed Access Types** determine which user assignments will display on the portal. Leave blank to show all.  
For more advanced configuration, add a **User Assignment Filter**. All three filter fields will be combined.

Allowed Domains:

Allowed Types:

Advanced Filter: All User Assignments [Edit Filters](#)

---

The **View User Assignment Portal** screen:

Administration > User Assignment Portals > Edit User Assignment Portal Go To Portal (as ) More ▾

Name:	<input type="text"/>	Validation Fields:	Employee.LastName, Contact.LastName
Is Active:	Yes	Domains:	Assignments will be shown for all domains
External Access:	NH EAP	Access Types:	All assignment types will be shown
Type:			

**i** Click either QR Code to copy its link.



Internal URL



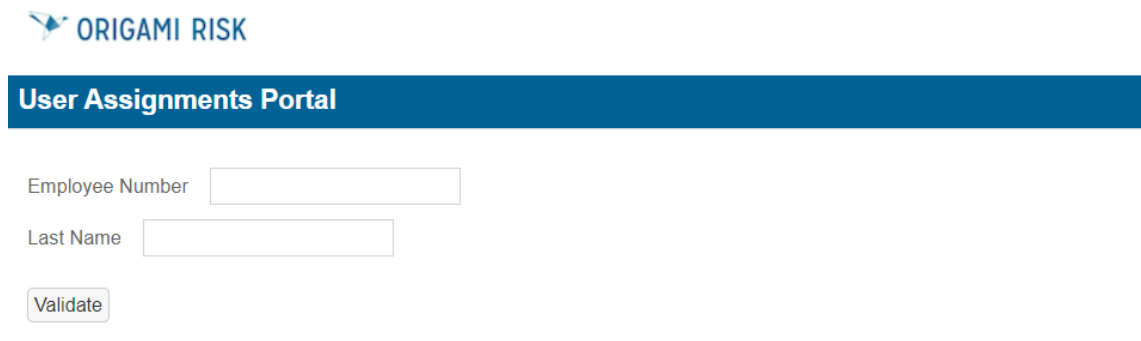
Anonymous URL

The **internal link** will display this portal to the currently logged in user.  
The **anonymous link** will grant an anonymous user access by logging them in as the portal user ()

It is important that the external link is only given to those that need to access the portal.

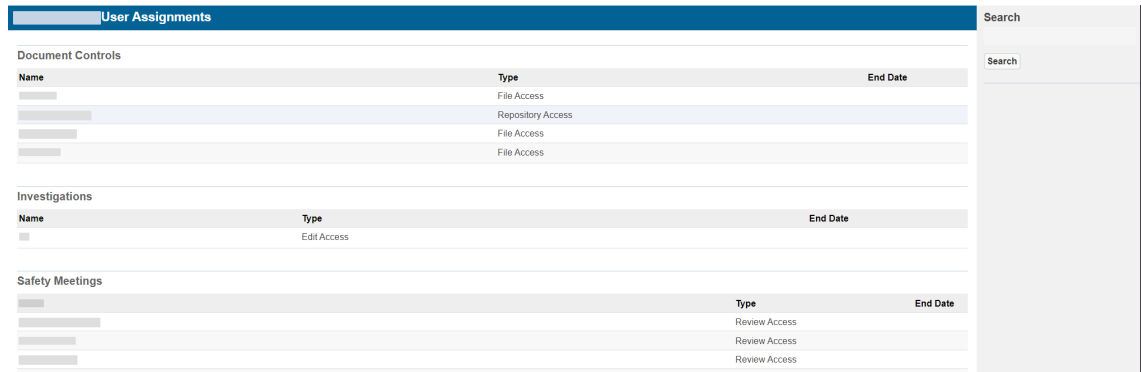
### End user screens

The *User Assignments Portal Log in* screen:



The screenshot shows the 'User Assignments Portal' login interface. It features the Origami Risk logo at the top left. Below the logo is a dark blue header bar with the text 'User Assignments Portal' in white. The main content area contains two input fields: 'Employee Number' and 'Last Name'. Below these fields is a 'Validate' button. The entire form is set against a light gray background.

The *User Assignments* screen:



The screenshot displays the 'User Assignments' table. The table is organized into three sections: 'Document Controls', 'Investigations', and 'Safety Meetings'. Each section has a table with columns for 'Name', 'Type', and 'End Date'. A search bar is located on the right side of the table.

User Assignments			Search
Document Controls			Search
Name	Type	End Date	
[Redacted]	File Access		
[Redacted]	Repository Access		
[Redacted]	File Access		
[Redacted]	File Access		
Investigations			
Name	Type	End Date	
[Redacted]	Edit Access		
Safety Meetings			
[Redacted]	Review Access		
[Redacted]	Review Access		
[Redacted]	Review Access		

## System administrators



When our system adds new fields to a form, they are only added to the default form. If you have edited the **view mode** or **edit mode** form, your custom version of the form will not be updated. To use a new field, add it manually to your custom **view mode** or **edit mode** form in **Admin > Custom Forms**.

## System-wide administration

### Add a Notes menu item (relating to a single domain) to the main menu

#### Now

When this option is activated, you can use the new **Notes** link in the main menu to view all notes for a particular domain. For example, if the Notes feature is configured for the `Claim` domain, users will be able to see all notes relating to the claims they have access to.



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

## How and where

### To add a notes link to the main menu



You need to be at the account level.

1. From the main menu, select **Admin**.
2. In the **Fields, Labels and Forms** section, select **Custom Forms**.
3. Select the name of the form set you want to edit.
4. In the right side panel, in the **Navigation Configuration** section, select **Main Menu**.
5. In **Add a module**, select **Notes**.  
**Notes** is now at the bottom of the menu list.
6. Use the green up and down arrows next to **Notes** to set the location in the menu.
7. Select **Save**.



The **Notes** menu item will only be visible to users when there are existing notes relating to the domain items, for example, claims, that they have access to.

## Give the Agent domain a custom name throughout Origami Risk

### Now

You can now use domain name overrides to rename the `Agent` domain, so the domain displays as a different name throughout the system.

### How and where

**Admin > Domain Name Overrides.**



## Audits administration

### Limit edit access to audit definition responses (using audit definition access groups)

#### Now

You can now determine if a user can edit the audit definition responses they create.



If user currently has **Edit** access, **Edit Mine** access is automatically selected.

#### New fields

This new field is on the **Audit Definition Access Group Details** screen.

<b>Edit Mine</b>	Indicates if this user can edit the audit definition responses they create.
------------------	-----------------------------------------------------------------------------

#### How and where

1. From the main menu, select **Admin**.
2. In the **Users and Security** section, select **Audit Definition Access Groups**.
3. Select the display name of the audit definition access group to update.



To define permissions by user, the audit definition access group must have **No** selected in the **Full Access** field.

4. Select **Edit Audit Definition Access Group**.
5. In the **Audit Definition Permissions** section, update the **Edit Mine Access** permission as needed.

## Claims administration

### Create a loss event directly after a user searches for a policy, without viewing the policy snapshot

#### Previously

When search for a policy using the **Policy Snapshot** search and retrieve, when you select the policy, you are taken to the **Policy Snapshot** screen. This can still be true.

**Now**

When this option is activated, after you complete the policy search, a new **Create Loss Event** drop-down is displayed for each policy type in the search results list. This allows you to quickly bypass the **Policy Snapshot** screen and start documenting the loss event.



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

## Note templates available when you close or reopen a claim

**Now**

You can now use a note template to add a note when closing or reopening a claim. The template is available when a claim changes status to **close**, **reopen**, or for all status changes on a claim.



Note templates are not available when a note is created from the right panel or under **All Notes**.

**New fields**

This new field is on the **New Note Template** screen.

**Status Change Types**


Available only when **Claims** is selected in **Area**.

Indicates the status type when the template is available to use. The following options are available:

- **Close**
- **Reopen**
- **All Status Changes**

This new field is on the **Close Claim** or **Reopen Claim** window.

**Choose Template...**

Indicates what template is used to pre-populate the note.



This field is populated by **claims** note templates that match the status of this claim.

## How and where



### Create the Note template

1. Navigate to **Admin** and select **Note Templates**.
2. In the **Area** field, select **Claims**.
3. In the **Status Change Types** field, select the option for which this template will be available.
4. Provide the remaining relevant data.
5. Select **Save Changes**.

## Use a Note Template when you close or reopen a claim

1. Navigate to the **claim** you want to close or reopen.
2. select **Close Claim** or **Reopen Claim**.  
The **Close Claim** or **Reopen Claim** window is displayed.
3. In the **Choose template...** field, select the note template.  
The system updates the note with the pre-populated information from the note template.
4. Update the note, as needed.

## Data entry events (DEE) administration

### Create a DEE for a domain

#### Now



This functionality is available for the `UserAssignedAction` and `DocumentControl` domains.

You can now create a data entry event for a domain.

#### New screen

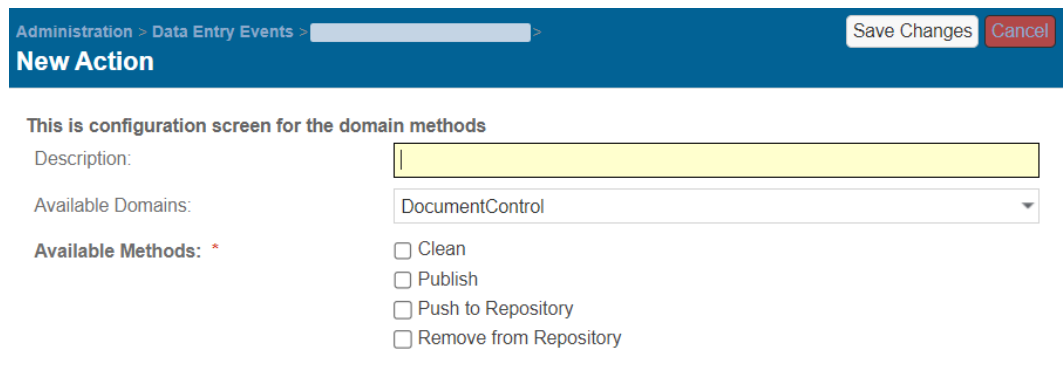
The **New Action** screen for a domain specific action is used to define an action for a domain, for example, you can create a DEE to publish all document controls when the review is complete.

## Fields

<b>Description</b>	The description of the new action.
<b>Available Domains</b>	The domain used for this action.
<b>Available Methods</b>	Define the methods this DEE performs. <ul style="list-style-type: none"> <li>To remove comments and red-lines from the document, select <b>Clean</b>.</li> <li>To publish the document, select <b>Publish</b>.</li> <li>To publish and push the document to the repository, select <b>Push to Repository</b>.</li> <li>To remove the document from the repository, select <b>Remove from Repository</b>.</li> </ul>

## How and where

1. From the main menu, select **Admin**.
2. In the **Fields, Labels and Forms** section, select **Data Entry Events**.
3. Select **New Data Entry Event**.
4. Select either the **User Assigned Actions** or **Document controls** area.
5. Provide the relevant data.
6. Select **Save changes**.
7. In the **Actions Triggered by Event** section, in the **Create a new action** drop-down, select **Domain Specific Action**.
8. The **New Action** window is displayed.



9. Provide the relevant data.
10. Select **Save changes**.





## Define the end and due dates of a user assignment action

### Now

You can now define the end date or due date for a user assignment action based on another DEE event, for example, set up a safety huddle DEE to trigger 7 days after an assignment is created.

### New fields

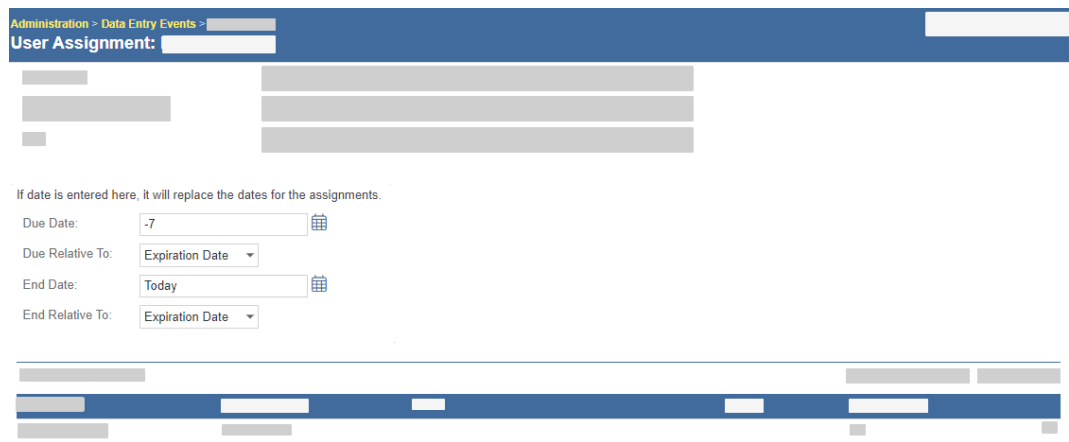
These new fields are on the *User Assignment* screen.

<b><i>Due Date</i></b>	Enter a calculation or the actual due date for this user assignment.
	 This field is typically used with <b><i>Due Relative To</i></b> , for example, to have the assignment due 2 weeks after it is created, enter +14D in <b><i>Due Date</i></b> and select <b><i>Day of Event</i></b> from <b><i>Due Relative To</i></b> .
<b><i>Due Relative To</i></b>	Select the date field used to calculate the due date.
	 This field is populated with all date fields, including any custom date fields, for the selected area. This field is typically used with <b><i>Due Date</i></b> , but can be used by itself.
<b><i>End Date</i></b>	Enter a calculation or the actual end date for this user assignment.
	 This field is typically used with <b><i>End Relative To</i></b> .
<b><i>End Relative To</i></b>	Select the date field used to calculate the end date.
	 This field is populated with all date fields, including any custom date fields, for the selected area. This field is typically used with <b><i>End Date</i></b> , but can be used by itself.

### How and where

1. From the main menu, select **Admin**.
2. In the **Fields, Labels and Forms** section, select **Data Entry Events**.
3. Select **Create New Data Entry Event**.
4. Select an area that has user assignments, for example, **Document Controls**.
5. Provide the relevant data.
6. Select **Save Changes**.
7. In the **Actions Triggered by Event** section, in the **Create a new action** drop-down, select **New User Assignment**.

The **User Assignment** screen is displayed.



## Include file attachments from parent records in DEE actions

### Previously

In DEE emails, you could only include file attachments from the record triggering the event.

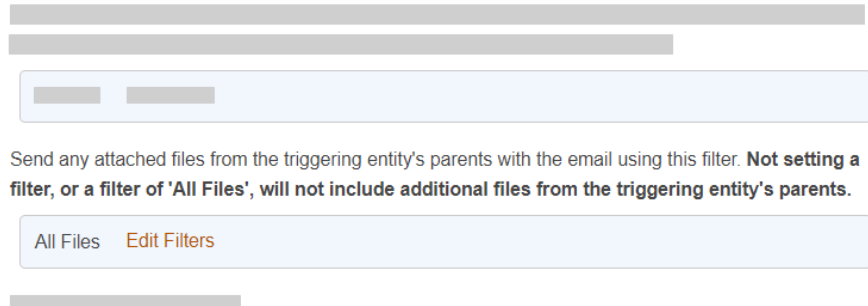
### Now

DEE emails can now include file attachments from parent records using a new parent filter on emails, abstract, and grant access actions.

### How and where

1. **Admin > Data Entry Events**
2. Create a new DEE (and **Save**) or open an existing DEE.
3. In the **Actions Triggered by Event** section, in the **Create a new action** drop-down, select one of the following new actions:
  - New Email
  - Create Abstract
  - Grant Access Actions
4. In the **Email Attachments** section, create a filter in the **Send any attached files from the triggering entity's parents with the email using this filter** field to send matching attached files from the parent record.

Email Attachments:



Send any attached files from the triggering entity's parents with the email using this filter. **Not setting a filter, or a filter of 'All Files', will not include additional files from the triggering entity's parents.**

All Files [Edit Filters](#)

## Perform bulk actions on document controls

### Now

You can now use bulk actions on document controls data entry events.

### How and where

1. Navigate to **Admin** and select **Data Entry Events**.
2. Open your document controls data entry event (or create a new document controls DEE).
3. In the **Manual Event Details** section, select both of these options:
  - **Allow Manual Fire of this Event**
  - **Allow event to be run as Bulk Action**
4. Provide any remaining relevant data.
5. Select **Save Changes**.

## Document controls | Policies and procedures management (PPM) administration

### Track changes to document template elements in the audit history

#### Now

When this option is activated, changes to document template elements will be tracked in the audit history.



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

#### How and where

##### To see the audit history of a document template

1. Navigate to the document template.
2. Select **More**.
3. In the **Audit Records** section, select **Document Template Change History**.

### Use anonymous portals for document controls

#### Now

Anonymous portals are now available for document controls. You can now create a portal that lets non-named users enter records into document controls. For example, if your system has the **Contract Management** solution, you can allow anyone in your organization (or outside vendors) use a link to enter contract requests directly into Origami. This can then kick off necessary workflows to start the contract review process.



**How and where**

1. From the main menu, select **Admin**.
2. In the **Accounts** section, select **Anonymous Collection links**.
3. Click **New Anonymous collection Link**.
4. Provide the relevant data.
5. Select **Save Changes**.
6. In the **Collection Link Items** section, select **New Collection Link Item**.
7. Select **Document Controls** as the type.
8. Provide the relevant data.
9. Select **Save Changes**.

## Employee profiles administration

### Assign teams to an employee profile

**Now**

You can now assign teams to employee profiles. All individuals within a selected team are assigned the requirements from the employee profile.

**New section**

The new **Teams** section is on the **Employee Profile** screen.

Teams					<a href="#">Manage Associated Teams</a> <a href="#">View All</a>
Team Name	Team Description	Location	Territory	Is Inactive	

### How and where

1. From the main menu, select **Admin**.
2. In the **Trainings or Certifications** section, select **Employee Profiles**.
3. Select the name of the employee profile to edit.
4. In the **Teams** section, select **Manage Associated Teams**.  
The **Teams** window is displayed.
5. On the right panel, in the **Filter by** section, fill in the fields and select **Search** to limit the size of the teams list.
6. In the teams list on the left, use the check boxes to the left of the **Team Name**, to select the teams.
7. Select **Done Selecting**.

## Create new requirements for vaccinations, testings, and screenings

### Previously

You could only add training and certification requirements to an employee profile.

### Now

You can now add requirements for vaccinations, testings, and screenings (from vaccination records and health records).

The out of compliance message has also been updated. This message is displayed when you open an employee profile and the employee has requirements that are missing or overdue.

**!** This employee/contact/user is out of compliance with one or more requirements. See the list below.

Requirement	Type	Status	Is Required	Required By
CPR <span>Complete next step</span>	Training/Certification	Missing	Yes	MedSurg Reqs (Employee Profile)
Reading <span>Add certification</span>	Training/Certification	Missing	Yes	MedSurg Reqs (Employee Profile)
Vaccination Record ⓘ <span>Add certification</span>	Vaccination Record	Missing	Yes	MedSurg Reqs (Employee Profile)
Health Record ⓘ <span>Add certification</span>	Testing and Screening	Missing	Optional	MedSurg Reqs (Employee Profile)
Vaccination Record ⓘ <span>Add certification</span>	Vaccination Record	Missing	Optional	MedSurg Reqs (Employee Profile)
Health Record ⓘ <span>Add certification</span>	Testing and Screening	Missing	Yes	MedSurg Reqs (Employee Profile)

New column shows the type of requirement that is missing for this employee

**How and where**

1. From the main menu, select **Admin**.
2. In the **Trainings or Certifications** section, select **Employee Profiles**.
3. Select the name of the employee profile to edit.
4. In the **Employee Profile Requirements** section, select **New Requirement**.
5. In the **Type** field, select the type of requirement.
6. Provide the relevant data.
7. Select **Save Changes**.

## ERM (Enterprise Risk Management) administration

### Plot three ERM factors on a heat map

**Now**

When this option is activated, a new heat map is available that plots 3 factors within the same heat map. The new heat map uses methodologies and lenses (that have only 3 factors assigned). This allows you to add an additional scoring factor to your heat map for a third dimension. The heat map displays each factor as a sized and colored bubble.



To use this feature, see your Origami Service administrator to update your system settings and configure the heat map.

**How and where**

### To place the new heat map

1. From the main menu, select **Dashboards**.
2. Select **Edit Dashboard**.
3. Select **Add Widget**.
4. Add **ERM Heat Map 3 (Inherent or Residual)**.
5. Select the lens.



Only lenses that use methodologies with 3 factors are available.

6. Select the factors to be used for the x-axis and y-axis (the number corresponds to the position in the formula.)



The unused factor will be set to the third factor in the heat map.

7. Select **Save Changes**.

On the dashboard, risks that are scored with that lens are now displayed in the new heat map.

## Policies and billing administration

### Change workers compensation pay as you go to report payroll by location instead of job class code

#### Previously

For workers compensation policies, when reporting the payroll with pay as you go, users submit the customer's actual payroll grouped by job class code within a state. This can still be true.

**Now**

When this option is activated, for workers compensation policies, when reporting the payroll with pay as you go, you can submit the customer's actual payroll grouped by location within a state.



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

**New fields**

This new field is located on the **Pay As You Go** screen.

<b>Sort by</b>	Indicates how payroll is reported for workers compensation pay as you go. <ul style="list-style-type: none"><li>• To report payroll by job class code within a state, select <b>State</b>.</li><li>• To report payroll by location within a state, select <b>Location</b>.</li></ul>
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This new field is on the **Payroll Self Reporting** screen.

<b>Location</b>	Shows the location name and number from the policy.
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## How and where

### To set up a workers compensation policy pay as you go to report payroll by location

1. From the main menu, select **Admin**.
2. In the **Policy and Underwriting** section, select **Rating Programs**.  
Select the description of the workers compensation rating program for which you want to edit.
3. Select **More**.
4. Select **Pay as you go**.
5. In the **Payroll data queries** section, in the **Sort by** field, select **Location**.
6. In the information box under the **Sort by** field, copy the example SQL statement from the informational text.



The SQL statement starts with the line: "select".  
You must select the entire SQL statement.

7. Paste the SQL statement into the **Payroll Line Item SQL** field.
8. Select **Save Changes**.

The **Payroll Self Reporting** screen now shows the new **Location** column instead of the **Job Class Code** column.

## Create one-off commission adjustment checks

### Previously

When a commission is manually adjusted, the adjustment must be attached to existing commissions to create a combined check. If there are no existing commissions, the system waits for the next commission payable before processing the manual adjustment. This can still be true.

### Now

When a commission is manually adjusted, and there are no existing commissions, you can now create a one-off check for the commission adjustment amount.

### New fields

This new field is on the edit **Rating Program** screen.

<b>Allow one-off commission adjustment checks to be created</b>	Indicates when the system can create a commission check for manual commission adjustments. <ul style="list-style-type: none"> <li>To create a commission check as a one-off check when there are no other existing commissions, select this field.</li> <li>To create a commission check only when there are existing commissions, clear this field.</li> </ul>
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### How and where



You must be at the client level.

- From the main menu, select **Admin**.
- In the **Policy and Underwriting** section, select **Rating Programs**.  
Select the description of the rating program you want to edit.
- Select **More**.
- From the **Rating Program** section, select **Billing and Commissions**.
- In the **Commissions** section, update the **Allow one-off commission adjustment checks to be created** field.
- Select **Save Changes**.

## Hide the page counts on an application interview form

### Now

You can now hide the page counts, for example, "page 1 of 8", on an application interview form.

### New fields

This new field is on the edit **Application** screen.

<b>Remove Page Counter</b>	Indicates if the page count, for example, "page 1 of 8", is displayed on an application interview form. <ul style="list-style-type: none"> <li>To hide the page counts, select this option.</li> </ul>
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### How and where

1. From the main menu, select **Admin**.
2. In the **Policy and Underwriting** section, select **Application Interview Forms**.
3. Select the description of the application interview form you want to edit.
4. From the **More** menu, select **Edit Application**.
5. select **Remove Page Counter**.
6. Select **Save Changes**.

## Download a payment confirmation receipt from OneInc



If your system currently integrates with OneInc, this functionality is available.

### Previously

When you complete an online payment using OneInc, there is no way to view or download a confirmation receipt. This can still be true.

### Now

When you complete an online payment using OneInc, you can now automatically attach the confirmation receipt to the payment transaction. A link is also available on the **Member Payment** screen to view or manually download the payment receipt.

### New fields

This new field is on the **Account Settings** screen, in the **Online Payments** section.

#### **Confirmation Display Script**

Enter a script to automatically download the confirmation receipt as a URL attached to the payment transaction. After the receipt is attached, a **View Payment Receipt** button is displayed on the **Member Payment** screen.

This new link is on the **Member Payment** screen.

#### **View Payment Receipt** link



This link is only displayed for completed payments that automatically downloaded a URL confirmation receipt from OneInc.

Allows you to view or manually download the confirmation receipt.



To show this link on future completed payments, select **Confirmation Display Script** on the **Account Settings** screen.



## How and where

### To set up automatic confirmation receipts for completed payments with OneInc

1. From the main menu, select **Admin**.
2. In the **Account** section, select **Account Settings**.
3. In the **Online Payments** section, enter your script in the **Confirmation Display Script** field, for example:

Confirmation Display Script 

```
function Go(proposalOrPolicy) {
  if (proposalOrPolicy.PolicySetID == 1)
    return true;
  else
    return false;
}
```

4. Select **Save Changes**.

### To view or manually download a confirmation receipt

1. Navigate to the completed payment.  
The **Member Payment** screen is displayed.
2. Click **View Payment Receipt**.



This link is only displayed for completed payments that automatically downloaded a URL confirmation receipt from OneInc.

## Schedule a one-time payment with OneInc




If your system currently integrates with OneInc, this functionality is available.

### Now

You can now schedule, edit, and cancel a one-time payment using OneInc.


### New fields

This new field is on the **Account Setting** screen.


<b>Allow Scheduled Payments</b>	 Available only when the <b>Provider</b> is OneInc.
Indicates if users can schedule one-time payments for a future date using OneInc.	

### How and where

#### To activate scheduled one-time payments with OneInc

 You must be at the client level.

1. From the main menu, select **Admin**.
2. In the **Account** section, select **Account Settings**.
3. Above the **Payment Category Script** field, update the **Allow Scheduled Payments** field.

 This field is only available when the **Provider** is OneInc.

4. Select **Save Changes**.

#### To schedule a one-time payment with OneInc

1. Open the policy.
2. In the **Premium Invoices** section, select the invoice where you want to make a scheduled payment.
3. Select **Pay Online**.  
The **Online Payment** screen is displayed.
4. Select **Pay Online**.  
The **OneInc** payment screen is displayed.
5. In the **Payment Date**, select the calendar icon to select a date in the future for this payment.
6. Provide the remaining relevant data.
7. Select **Review** and complete the payment.  
The payment is now scheduled.

### To edit a scheduled payment with OneInc

1. Open the policy that contains the invoice with a scheduled payment.
2. In the **Premium Invoices** section, select the original invoice where the payment was scheduled.



This is not the invoice that has the type **Scheduled Payment**.

The member invoice is displayed.

3. Select **Pay Online**.

The **Online Payment** screen is displayed.

4. Select **Pay Online**.

The **OneInc** payment screen is displayed.

5. In the **Payment Date**, select the calendar icon to update the date for this scheduled payment.

6. Select **Review** and complete the payment.

The payment is now scheduled with the new date.

### To delete a scheduled payment with OneInc

1. Open the policy that contains the invoice with a scheduled payment.
2. In the **Premium Invoices** section, select original invoice where the payment was scheduled.



This is not the invoice that has the type **Scheduled Payment**.

The member invoice is displayed.

3. Select **Pay Online**.

The **Online Payment** screen is displayed.

4. Select **Pay Online**.

The **OneInc** payment screen is displayed.

5. In the **Current Schedule** section, select the **Cancel Scheduled Payment** link.

6. Follow the prompts.

The scheduled payment is now cancelled.

## Place each proposal coverage as a separate panel on the proposal form

### Previously

You could only embed multiple proposal coverages on the proposal **view** or **edit** form as a single, embedded form panel.

### Now

You can now embed each proposal coverage independently on the proposal **view** or **edit** form in any place on the form. The new panels can be expanded or collapsed.

### How and where

1. From the main menu select **Admin**.
2. In the **Fields, Labels and Forms** section, select **Custom Forms**.
3. Select the name of the form set you want to edit.
4. Open the Proposal's **View** or **Edit** form.
5. Use the following syntax to embed the form panel:

```
<embeddedFormPanel if="Type:!eq:E"
embeddedDomain="ProposalCoverages" title="Auto Liability"
embeddedTypeFilter="10" enableExpandCollapse="true"
expandedByDefault="false"/>
```

## Show the "Policy Changes" button when you are on a policy

### Previously

The **Policy Changes** option is located under the **More** menu, when you are on a policy. This can still be true.

### Now

When this option is activated, the **Policy Changes** option is instead a button on the **Policy** screen.



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

## View how new changes to a proposal or a coverage affect the premium while on the edit screen

### Previously

When editing a proposal or a coverage, you need to select the **Save Changes** button and return to the view **Proposal** screen or view **Coverages** screen to see how the change affected the premium. This can still be true.

### Now

When this option is activated, after you make a change to the **Proposal** or **Coverages** screen, you can use the new **Save and Continue** button to update the current screen's configured premium fields and see how those changes affect the premium without having to leave the edit screen.



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

## Rating programs administration

### Bulk bind pending endorsements with blank and null endorsement types

#### Now

You can now bulk bind all pending endorsements with blank or `NULL` endorsement types.

### How and where

1. Navigate to **Admin** and select **Rating Programs**.
2. Open the rating program.
3. From the **More** menu, select **Bind Endorsement**, then select the type: **No Endorsement Type**.

#### Select Endorsement Type

##### Endorsement Types

No Endorsement Type

Audit

Midterm Change

4. All pending endorsements with blank or NULL endorsement types are fetched.

## Safety huddles administration

### Improve attendee and team maintenance

#### Previously

There are limitations when maintaining safety huddle rosters and removing teams. This can still be true.

#### Now

When this option is activated, the **Safety Huddle Attendees** section is replaced with the **User Assignments** section on the **Safety Huddles** and the **Safety Huddle Schedule** screens. This give you access to all the user assignment options, including:

- Using automatic maintenance to keep assignments up-to-date with the current team roster and move completed safety huddles to manual maintenance (which creates a historical record of the attendees).
- Easily deleting team assignments and teams.



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

## Quickly switch between safety huddles and safety huddle schedules

### Now

You can now quickly move between safety huddles and safety huddle schedules using a link in the **More** menu.

### How and where

#### From safety huddles

1. From the **Safety Huddles** list screen, select **More**.
2. Click **View Safety Huddle Schedules**.  
The **Safety Huddle Schedules list** screen is displayed.

#### From safety huddle schedules

1. From the **Safety Huddle Schedules** list screen, select **More**.
2. Click **Safety Huddles**.  
The **Safety Huddles list** screen is displayed.

#### To create or edit the safety huddle schedule for a safety huddle

1. From the **Safety Huddle** screen, select **More**.
2. Click **Safety Huddle Schedule**.

## Value collections administration

### Show audit tracking for value collection assignments or assignees

#### Previously

You are unable to track changes to value collection assignments or assignees. This can still be true.

#### Now

When this option is activated, you can see the change history on value collection assignments or assignees.



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

## How and where

### View the change history for a value collection's assignments or assignees

1. Navigate to the values collection assignments.
2. Select the name of the value collection for which you want to view the audit tracking.
3. Select **More**.
4. In the **Audit Records** section, select **Value Collection Change History**.



## System users

### System-wide

#### Associate safety huddles with document controls

##### Previously

You were unable to track which documents relate to which safety huddles.

##### Now

You can now associate document controls to a safety huddle in two places: document controls and safety huddles. These new associations can also be viewed in the **Connections** sunburst chart. (Sunburst charts are a visual representation of all associations for the current document control or safety huddle.)

##### How and where

#### To associate safety huddles to a document control



To associate documents, you must be the owner or co-owner of the document control.

1. From the main menu, select **Document Controls**.
2. Select the title of the document control you want to edit.
3. In the **Safety Huddles** section, click **Manage Associated Safety Huddles**.



You can also associate safety huddles with this document control from the **More** menu. In the **Associated** section, select **Safety Huddles**.

The **Safety Huddles** window is displayed.

4. Using the check boxes to the left of the **Huddle Number**, select all safety huddles you want to associate with this document, then click **Done Selecting**.

- To view the new safety huddle connections in the sunburst chart, click the **Connections** button.



It may take a few moments for the system to update the sunburst chart with your new changes.

### To associate document controls to a safety huddle

- From the main menu, select **Safety Huddles**.
- Select the huddle number of the safety huddle you want to edit.
- Select **More**.
- In the **Associated** section, select **Document Controls**.  
The **Document Controls** window is displayed.
- Using the check boxes to the left of the **Title**, select all document controls you want to associate with this safety huddle, then click **Done Selecting**.
- To view the new document control connections in the sunburst chart, click the **Connections** button.



It may take a few moments for the system to update the sunburst chart with your new changes.

## Claims

### The claim timeline now includes check activity

#### Now

For better auditing and reporting purposes, the claim timeline now shows the following actions on checks tied to a claim:

- workflow and status changes
- reassignments
- edits, updates, and deletes performed on a check

#### How and where

- Open a Claim.
- Navigate to the **More** menu and select **Claim Timeline**.

## Document controls | Policy and procedure management (PPM)

### Bulk publish document controls with redlining or comments

#### Now

You can now bulk publish document controls that have redlining (tracked changes) or comments.

#### How and where

1. Navigate to the document controls list.
2. From the **More** menu, click **Publish**.
3. Select the documents to publish.

If any document has comments or redlining, the following warning message is displayed.

---

**WARNING:** this document version contains comments or tracked changes that have not been approved.

Click **Publish** to Publish with visible comments or tracked changes. The Document Status will be updated to "Published".

Click **Clean and Publish** to automatically strip out any comments/approve tracked changes and Publish the file in one step. Comments and tracked changes will also be stripped/approved in the source file.

Click **Cancel** to go back to the Document Control Record (the document will not be published and comments/redlines will not be affected).

---

4. Select the preferred option.

### File access schedules are now called access schedules and include more access types

#### Now

In document controls, "file access schedules" have been renamed to "access schedules". Access schedules now include file access, repository access, review access, and download access.

On the **Document Controls** screen, the **File Access Schedules** section is now called **Access Schedules**.

## Create a schedule for file access, repository access, review access, and download access

### Now

You can now create a schedule for file access, repository access, review access, and download access. You can also assign teams to any access type.

### New fields

This new field is on the **New Schedule** screen in the **Assignment** section.

<b>Access Type</b>	<p>Indicates which type of access you want to schedule. The following options are available:</p> <ul style="list-style-type: none"> <li>• <b>File Access</b></li> <li>• <b>Repository access</b></li> <li>• <b>Review Access</b></li> <li>• <b>Download Access</b></li> </ul>
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### How and where

#### To create an access schedule



To create a schedule, you must be the owner or co-owner of the document control.

1. Navigate to the document controls list.
2. Select the title of the document control for which you want to create a new schedule.
3. In the **Access Schedules** section, select **New Schedule**.
4. To select the access type for this schedule, in the **Assignment** section, use the **Access Type** field.
5. Provide the relevant data.
6. Select **Save Schedule**.  
The **Assignee Type Selection (Step 1 of 3)** screen is displayed.
7. Follow the prompts, providing the relevant data.
8. When finished, click **Submit**.

### To edit an access schedule



To edit a schedule, you must be the owner or co-owner of the document control.

1. Navigate to the document controls list.
2. Select the title of the document control for which you want to edit a schedule.
3. In the **Access Schedules** section, click the **Frequency** link for the schedule you want to edit.
4. Provide the relevant data.
5. When finished, click **Save Schedule**.

### To edit the assignments of an access schedule



To edit the assignments of a schedule, you must be the owner or co-owner of the document control.

1. Navigate to the document controls list.
2. Select the title of the document control for which you want to edit a schedule.
3. In the **Access Schedules** section, click the **Assignments** link for the schedule you want to edit.
4. Follow the prompts, updating the relevant data.
5. When finished, click **Submit**.

## Limit the permissions of additional owners

### Now

You can now limit the permissions for individual or team additional owners of a document control.



Additional owners already in the system have all permissions turned on, by default.

### New fields

These new fields are on the **Additional Owner** window.

<b>Publish</b>	Indicates if this user or team can publish this document. The default value is <b>No</b> .
<b>Manage Repository</b>	Indicates if this user or team can add or remove the document control in the repository. The default value is <b>No</b> .
<b>Manage Owners</b>	Indicates if this user or team can manage the owners of this document control. The default value is <b>No</b> .

### How and where



You must be an owner (or an additional owner with rights to manage owners) of the document control to access the **Additional Owners** section.

1. From the main menu, select **Document Controls**.
2. Select the title of the document control you would like to edit.
3. In the **Additional Owners** section, select the assignee's name.  
The **Additional Owner** window is displayed.
4. Update the relevant data.
5. Select **Save Changes**.

## Remove comments or redlining before publishing a document

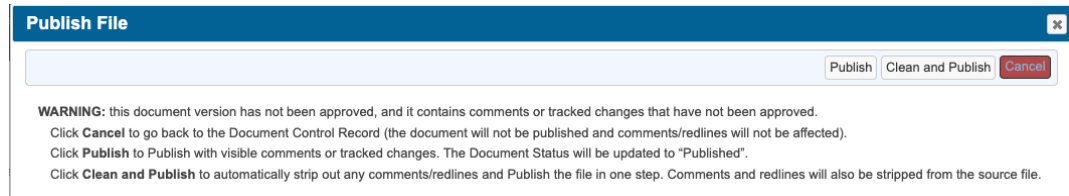
### Now

You can now remove all comments or redlining (tracked changes) from a MS Word document before publishing.

### How and where

1. Navigate to the MS Word document you want to publish.
2. Click **Publish**.

If the document has comments or redlining, the **Publish File** warning will be displayed.



3. Select **Clean and Publish**.

The system removes any comments or redlining, then publishes the document.

## Use form tags in a document control

### Now

When this option is activated, you can add form tags to a document control.


### New user permissions

This new permission is in the **Document Control** section.

<b>Add Merge Fields</b>	Indicates if the role can add form tags to a document control.
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### New link

This new link is on the edit **Document Control** screen, at the top of the screen.

<b>Show Merge Fields Menu</b>	<div style="border: 1px solid #007bff; border-radius: 10px; padding: 10px; margin-bottom: 10px;">  This functionality is controlled by the following role permission: <b>Add Merge Fields</b> in the <b>Document Control</b> section.                 </div> <p>Click this link to show the <b>Add Merge Fields</b> section at the top of the screen.</p> <ul style="list-style-type: none"> <li>• Enter the relevant information, then select <b>Insert Merge Field</b>.</li> <li>• To hide the <b>Add Merge Fields</b> section, click <b>Hide Merge Fields Menu</b>.</li> </ul>
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## How and where

### To update the merge fields permission for a role

1. From the **Gear** menu, select **Account:...** to access the account-level settings.
2. From the main menu, select **Admin**.
3. In the **Users and Security** section, select **Roles**.
4. Select **Only Apply Filter to Area Names selected** and search for: Document Control
5. Update the **Add Merge Fields** permission.
6. Select **Save Permissions**.

## To use a form tag in a document control



Users will need their permissions updated to use this new functionality

1. From the main menu, select **Document Controls**.
2. Select the title of the document control you want to edit.
3. At the top of the screen, select **Show Merge Fields Menu**.
4. Provide the relevant data.
5. Select **Save Changes**.

## ERM (Enterprise Risk Management)

### Turn off emails sent from an ERM plan

#### Now

You can now stop an ERM plan from sending email notifications.

#### New fields

The following new field is on the **ERM Plan** screen.

<b>Disable Email Notifications</b>	Indicates if emails are sent for the ERM plan. The default value is <b>No</b> .
	<ul style="list-style-type: none"> <li>• To stop receiving emails, select <b>Yes</b>.</li> <li>• To receive emails, select <b>No</b>.</li> </ul>



### How and where



Only the plan owner can edit the **Disable Email Notification** field.

1. From the main menu, select **ERM**.
2. Select **ERM Plans**.
3. Select the name of the ERM plan you want to edit.
4. Select **Edit ERM Plan**.
5. Update the **Disable Email Notification** field as needed.
6. Select **Save Changes**.

## Use the same scoring factor within the residual and inherent score configurations

### Now

You can now drag the same scoring factor into your residual or inherent score configuration formulas, for example, you can drag **likelihood** into your score configuration twice, to create this formula:  $\text{Impact} * \text{likelihood} + \text{effectiveness} * \text{likelihood}$ .

### How and where

1. Navigate to **ERM Methodologies**.

## View 6 or more assessors assigned to an ERM plan with a new link

### Previously

When there were 6 or more assessors assigned to an ERM Plan, the **Assessor Emails** column (in the **Plan Risks** section) expanded wide to show all the email addresses.

### Now

When there are 6 or more assessors assigned to an ERM Plan, the **Assessor Emails** column (in the **Plan Risks** section) now shows a **Multiple Assessors** link to reduce the width of the column.

### How and where

1. From the main menu, select **ERM**.
2. Select **ERM Scheduled Plans**.
3. Select the name of the plan that contains 6 or more assigned assessors.
4. In the **Plan Risks** section, click the **Multiple Assessors** link.

## Policies and billing

### The commission difference now shows on endorsement proposals

#### Now

When creating an endorsement proposal, you can now see the commission difference from the original commission.

#### New fields

This new field is on the **Endorsement Proposal** screen, in the **Premium** section.

<b>Original Commission Difference</b>	Shows the difference in commission compared to the original commission amount.
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### Display a notification that explains why you cannot bind a proposal

#### Now

When you are on a proposal and the **Bind Quote** button is not available, you can now quickly see why you cannot bind the current proposal. Here are some example messages:

- "Proposal is already bound."
- "Proposal status is Rejected, Bound, or Cancelled. "
- "Unable to bind proposal. Please set Is Book Policy to false as this Proposal is not set up to create Book Policies. "

### How and where

1. Open a proposal that doesn't show the **Bind Quote** button.
2. Select the **More** menu.
3. Click **Why Can't I Bind?**.

A new notification is displayed at the top of the proposal that explains why you cannot bind the current proposal.

4. Click on the notification to close it.

## Manually allocate funds from the payment screen



You can use this functionality if your system currently auto-allocates member transaction payments to policies that have outstanding invoices.

For more information, contact your Origami Service administrator.

### Previously

To move funds to future payments or specific premium line items, you had to make a payment, then de-allocate the payment.

### Now

You can now manually allocate the funds after you save the payment.

### New Fields

This new field is on the **New Payment** screen.

<b>Manual Allocation</b>	Indicates if you can manually allocate the funds after you save the payment. <ul style="list-style-type: none"> <li>• To allocate the funds manually, select the check box.</li> </ul> The <b>Manual Allocation</b> screen is displayed after you save this payment.
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## How and where

### To manually allocate a member payment from a premium Invoice

1. Navigate to the policy and make a payment.
2. In the **Premium Invoices** section, select an invoice.
3. From the **More** menu, select **Pay this Invoice**.

The **New Payment** screen is displayed.

4. Select the **Manually Allocation** check box.
5. Select **Save Changes**.

The **Manual Allocation** screen is displayed.

6. Allocate the funds, as needed.
7. Select **Save Allocation**.

### To manually allocate a policy payment from all premium invoices

1. Navigate to the policy and make a payment.
2. In the **Premium Invoices** section, select **All Premium Invoices**.
3. Select **Policy Payment**.

The **New Payment** screen is displayed.

4. Select the **Manual Allocation** check box.
5. Select **Save Changes**.

The **Manual Allocation** screen is displayed.

6. Allocate the funds, as needed.
7. Select **Save Allocation**.

## Select all write-off allocation transactions

### Now

On the **Write Off** screen, you can now select all transactions in the list for write-off allocations. The **Paid Amount** field automatically calculates the total amount from all selected transactions.

**How and where**

1. Open a policy.
2. Select **All Premium Invoices**, then select **Enter Write Off**.
3. On the **write off** screen, use the new check box in the **Write-Off Allocations** section, to the left of the **Invoice Date** column, to select all transactions in that section.

**New Member Write-Off****Write-Off Details**

**Member: \***

Policy:


**Transaction Date: \***

Paid Amount:

**Type: \***

Negative Write-Off:

**Write-Off Allocations**

 Select the line items that will be written off for this policy below.

<input type="checkbox"/>	Invoice Date	Category	Description	Bill
<input type="checkbox"/>				