October 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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What's new?

> ☼ If you cannot see the new or changed features, contact your Origami Service administrator.

New modules

Origami Risk Help Center

Why

We are retiring and replacing our outdated online documentation repository called ***Origami Guide***.

New solution

The ***Origami Risk Help Center*** is our new, free, accessible resource for clients to learn how to utilize and maximize the Origami system. This documentation repository contains an ever-growing module-by-module library to help you navigate and learn each area of our system.

- Visit the ***Getting Started*** section to familiarize yourself with how to navigate the system.
  - Use the menu on the left, in the ***Getting Started*** section, to learn more about system concepts and definitions. (This list will continue to grow.)
- Visit the ***What's New*** section to read the current release notes, review older release notes, and see additional information related to our product releases.
- Visit the ***What's New in Help Center*** page to see highlights of new and updated content recently added to the Help Center. This page will be updated regularly as we continue to grow our help repository.

How and where

To access the new Help Center, from the main menu, select ***New Help***.

System administrators

System-wide administration

New modern look for the Origami Risk platform

Why

At Origami Risk, we are always evolving and innovating. This October, we are rolling out a new modern look for our platform. Your feedback has been our guiding star to evolve our platform so that it is not only functional, but also one that delivers a better user experience. These design changes reflect our commitment to excellence, innovation, and most importantly, our clients.

Please send feedback about our new modern look to the design team at design@origamirisk.com.

New Solution

The Origami Risk *Login* screen shows our new modern look.

Beginning October 30, 2023, you can show and hide our new look in the entire system which includes updates to the following:

- *Fonts*: New, modern, and timeless fonts that enhances your readability.
- *Colors*: New color palette that lends a clear modern look to our navigation, tables, sidebar, and dashboard.
- *Buttons*: Improved button hierarchy that enhances clarity and quick decision-making.
- *Main menu*: Updated main menu fly-out navigation menu that offers a seamless browsing experience by eliminating overlapping text.

> ⊘ These design enhancements do *not* change any functionality within Origami Risk.

> 💡 To opt out of the new modern look design toggle, contact your Origami Service administrator.

How and where

1. To see our new modern look across your entire system, from the main menu bar, move the *Default/New Look* toggle toward *New Look*.

2. To go back to your previous look, from the main menu bar, move the *Default/New Look* toggle toward *Default*.

Mask fields with sensitive data on a view or edit screen

Now

When this permission is granted, you can now mask most fields in any known Origami domain to protect sensitive data, including personal identifiable information (PII), on edit or view screens.

The *Social Security Number* field is the only field that is partially masked to show the last four digits.

> Mask fields always display with the mask when you first open the screen.
>
> When a mask field is displayed inside a grid, the field is permanently masked.

Mask field examples

- When viewed by a user without permission to view the sensitive data:
  Social Security: ●●●-●●-6789   and   Commission: ●●●●●

- When viewed by a user with edit permissions on the current screen only. They can update the sensitive data, but not view it: Commission: ●●●●● ✎

- When viewed by a user with edit permissions on the current screen and also permission to view the sensitive data field. They can unmask and see the sensitive data:
  Commission: ●●●●● 🔒

- After the user with view permissions unmasks the field:
  Commission: 81000.00 🔓

- After the user updates the sensitive data, and can now undo their changes:
  Commission: 111|00 ↺

New role permissions

New role permission section on the *Permissions Assigned to Role* screen.

Sensitive Field Definition section	Indicates if this administrator can manage sensitive fields on the *Sensitive Field Definitions* screen. When granted, the role can now access the *Sensitive Field Definitions* screen.

New role permission on the *Permissions Assigned to Role* screen in the *Administration- Users and Security* section.

Manage Sensitive Field Permissions	Indicates if this administrator role can assign user permissions for sensitive fields. When granted, the role can now access the *Sensitive Field Permissions* screen.

How and where

⚙ **Assign administrator permissions that allow management of sensitive fields**

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

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

3. Select the role to update.

4. Select *Apply Filter to Area Names selected* and then search for `Sensitive Field Definition`.

5. In the *Sensitive Field Definition* section, update the permissions as needed.

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

    The role can now access the *Sensitive Field Definition* screen.

⚙ **Assign administrator permissions that allow assigning user permissions for sensitive fields**

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

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

3. Select the role to update.

4. Search for `Sensitive`.

5. In the *Administration- Users and Security* section, update *Manage Sensitive Field Permissions*.

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

    The role can now access the *Sensitive Field Permissions* screen.

⚙ **To define a field mask**

Define the mask on a field to protect sensitive data.

> 💡 An admin user must have their permissions updated to use this functionality.

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

2. In the **Fields, Labels and Forms** section, select **Sensitive Field Definitions**.

3. Select **New Sensitive Field Definition**.

4. Provide the relevant data.

5. Select **Save Changes**.

⚙ To assign user permissions for a singular or set of mask fields

> 💡 An admin user must have their permissions updated to use this functionality.

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

2. In the **Users and Security** section, select **Sensitive Field Permissions**.

3. Select **New Sensitive Field Permission**.

4. Enter a display name and description.

5. Select **Save Changes**.

6. Using the check boxes, select the fields that are included in this permission.

7. In the **Users** section, select **Manage Associated Users**.

8. Using the check boxes on the left, select the users that can view the sensitive data in the selected fields.

9. Select **Save Changes**.

   When the user has edit permission on the screen that contains the sensitive field, they now have a lock icon after the sensitive field that, when selected, shows the sensitive data.

To view mask field logs

View the unmask, reveal, and overwrite activity on masked fields.

> 💡 An admin user must have their permissions updated to use this functionality.

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

2. In the **Fields, Labels and Forms** section, select **Sensitive Field Definitions**.

3. Select **Unmasking Logs**.

   A new tab opens, showing the log.

4. When finished, close the tab.

To view and hide sensitive data in a masked field

> 💡 A user must have their permissions updated to use this functionality.

If you have permission to edit the current screen and also view the sensitive data in the field, the lock icon is displayed after the field.

- To show sensitive data in the masked field, select the lock icon.
- To mask the sensitive data again, select the unlock icon.

Updating information in a sensitive field

> 💡 A user must have their permissions updated to use this functionality.

Depending on your user permissions, you can update a sensitive field in one of the two ways.

1. To edit a masked field, either:
   - Select the pencil and paper icon to clear the field.
   - Select the lock icon to show the sensitive information.
2. Update the field.
3. If you want to revert the sensitive data back to its original value, select the red arrow rotating left icon.
4. Save your changes.

Prevent printing checks with negative balance

Previously

You did not have the ability to prevent the printing of checks with a negative balance.

Now

When this option is activated, you can now prevent the printing of checks with a negative balance at the bank account level.

New fields

New fields on the *Bank Accounts* screen.

Allow Printing of Negative Checks	Indicates if the user can print negative checks for a selected bank account.

How and where

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

2. Select *Bank Accounts*.

   The *Manage Bank Accounts* screen is displayed.

3. Select the bank account you want to edit.

4. Select *Edit Bank Account*.

5. To prevent users from printing checks with a negative balance, in the *Account Information* section, in the *Allow printing of negative checks* drop-down, select *No*.

   > If you select *Yes*, users will be able to print checks with a negative balance.

6. Select *Save Changes*.

7. From the main menu, select *Checks*.

   The *Checks* screen is displayed.

8. Select the checks you want to print.

9. Select *Print*.

   The *Print Options* screen is displayed.

   A bank account highlighted red indicates:

   - The *Allow printing of negative checks* option is set to *No* for that bank account.

   - And the bank account does not allow the printing of negative checks.

   > To resolve the negative balance and move forward, a user can either check *Consolidate checks going to the same payee* and ensure the total aggregated check amount is positive or remove any negative checks in the table.

10. Select *Next > Print Checks*.

User assignment action options updated

Previously

For user assignments, you can, via settings, enable, relabel, and remove *save draft* and *request change* actions. This is still true. However, you were unable to complete these same updates for *approve*, *reject*, and *comments* actions.

Now

For review assignments, you are now able to relabel or remove **approve** and **reject** actions. You can also remove **comments**, if applicable. As you could before, you can define these settings (and the prior settings) per domain.

> 💡 To enable any of these features, contact your Origami Service administrator.

User assignment portals can access document control repositories

Previously

The only document controls you could view through the user assignment portal were ones already assigned to you.

Now

You can now include document control repository filters to user assignment portals to make specific document repositories available through the portal.

How and where

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 select repository filters.

4. Select **Edit User Assignment Portals**.

5. In the **Allowed Repository Filters** list, select the repository filters you want to allow.

6. Select **Save Changes**.

Update user assignment portal elements

Previously

For a user assignment portal, you could not configure the validation screen for external users nor the assignments landing page.

Now

You have the ability to configure the title of a user assignment portal screen, the text of the validate button, and the title of an assignment landing page.

New fields

New fields on the *User Assignment Portal* screen.

Portal Title	Indicates the title shown on the portal screen.
Validate Button Text	Indicates the text shown on the validate button.
Assignment Page Title	Indicates the title of the assignment landing screen.

How and where

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

2. In the *Account* section, select *User Assignment Portals*.

3. Select the user assignment portal.

4. Provide the relevant data.

5. Select *Save Changes*.

Audits administration

Add a second location to an audit response

Now

You can now associate a second location to audit responses. This is useful if, for example, you have multiple hierarchies and want to associate an audit response to two locations from two different hierarchies, such as a building and a department.

New fields

⚙️   If you want to use this new field, add it to your *Audit Response* form.

Secondary Location	Defines an additional location for this audit response.
	💡 Location security is applied to the audit response records and any reports or dashboards created with audit response data from this audit response.

Bureau Central Repository (BCR) administration

Create an applicability filter that limits what records are shown in the policy changes summary of a letter template

Related Release Note

Show a summary of proposal changes only on records that match an applicability filter

Now

You can now create an applicability filter to limit what records are shown in the policy changes summary in letter template sections.

For example, if you want a change form to be attached if there are changes at the Proposal level and also any changes to NY, NJ, CT, you create this filter:

```
(Domain is Policy or State is Empty or State in (NY, NJ, CT))
```

> ✓ To get accurate results, be sure to use the conjunction "or" instead of "and".

How and where

1. 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 you want to update.
4. In the *Letter Template Sections list* section, select the existing section from the list or select *New Letter Template section* to add a new section.
5. In the *Applicability Filters* section, for the Policy Changes filter, select *Edit Filters*.
6. Update the filter as needed. Example below.

Advanced Search

Domain	is equal to ▼	Peer Review Case Peer Review Case Type Peer Review Type Performance Improvement Plan Policy
or State	is not equal to ▼	Rhode Island South Carolina South Dakota Tennessee Texas Utah
or State	is empty ▼	
➕ Select a field ▼	to add to your filter or add a sub-filter.	

7. Select **Apply Filter**.

Configure an optional endorsement form for one transaction use

Previously

On a policy, when a mail merge letter contained an optional endorsement form that was meant to be used only one time, the mail merge letter remained on the policy. Users would then have to manually delete the form from the **Optional Forms and Endorsements** section of the policy.

For example, you need to add a manuscript endorsement to communicate something to the insured specifically about what is being changed on the current transaction. Since this manuscript endorsement would not apply to subsequent transactions, you would not want it retained on future transactions.

Now

You can now configure an optional endorsement form so that after it is used on a transaction. The form is automatically removed from the **Optional Forms and Endorsements** section of the policy.

> ✓ Once the form is removed, you can re-add the form for a new transaction, and again, it will be removed on future transactions.

New fields

New fields on the *Mail Merge Template* screen.

Transaction Specific	Indicates if, after the form is used on a transaction, you want the form to be automatically deselected on future transactions. • To remove the form attachment on a new transaction, after the form has been used once on a transaction, select this field. After the form is used once on a transaction, the form is removed from the *Optional Forms and Endorsements* section of the policy. • To keep this form attached to all future transactions, leave this field empty. The form is attached to all future transactions, unless manually deleted from the *Optional Forms and Endorsements* section of the policy.

How and where

⚙️ **To set up an endorsement form as a one-use form**

1. 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 you want to update.

4. In the *Letter Template Sections list* section, select the existing section from the list or select *New Letter Template section* to add a new section.

5. In the *Options* section, in the *Selection Criteria* drop-down, select *User Selected*. This lets users select the form to be part of the policy.

6. Select *Transaction Specific*.

7. Select **Save Changes**.

To add a one-use endorsement form to a policy

1. Open the policy.

2. In the **Optional Forms and Endorsements** section, select **All Policy Endorsement Forms**.

3. Select **Select Endorsement Forms**.

4. Select the endorsement form that is a one-use form.

    Learn how to set up an endorsement form as a one-use form

5. Select **Save Selections**.

    The form is now available to use once from the **Optional Forms and Endorsements** section.

Show a summary of proposal changes only on records that match an applicability filter

Related Release Note

Create an applicability filter that limits what records are shown in the policy changes summary of a letter template

Previously

You could only add a summary of all changes made on a proposal, regardless of the state or location of business (LOB). To do this, use the following form tag in merge letter templates: `This.EndorsementChangesSummary`. This can still be true.

Now

When you have an applicability filter that limits what records are shown in the policy changes summary of a letter template, you can now use an enhanced form tag to see a summary that only includes data from records defined in that applicability filter.

How and where

In your mail merge letter template (**Admin** > **Mail Merge Templates**), use the new enhanced form tag:

`This.EndorsementChangesSummary.WithUseSectionPolicyChangeFilter`

> 💡 In this form tag, the state or LOB are defined in the applicability filter.

Update pending workers compensation (WC) rates

Previously

Version keys lock on policies once a quote is initially rated or upon issuance, depending on the set up for the rating program. This is intended behavior to prevent issued policies from being updated inadvertently with changes midterm. This can still be true.

Because of this, it is not possible to update an issued policy with new loss cost updates midterm.

Now

When this option is enabled, you can now identify which rate tables can be updated midterm, allowing policies to be updated with new versions of that rate table on endorsements.

New fields

New field on the **Rating Program** screen.

Pending WC Rates	Indicates if you want policies in this rating program flagged for upcoming workers compensation (WC) rate changes by state.

New Screen

Pending WC Rates screen	Access: **Admin** > **Pending WC Rates** • Within the repository database, in this case the BureauCentralRepository, this domain gets populated with states with pending rate changes from the bureaus and their associated date of the pending rate change and the percentage of the rate change. • In databases that are set up to point to the repository, the PendingWCRates table in the client database will display the entries that are set up in the repository. This account level screen allows you to manage the list of states with pending rate changes and their associated date of the pending rate change. You cannot add or delete records from this list. You can only override the pending **Rate Date** or **State Cov % Change** fields. On the right side, in the **Filter By** section, you can filter the list of state entries be year.

How and where

To update Pending WC rates on the endorsement

1. When you create an endorsement on a policy, if the policy has a pending rate, a message is displayed on the endorsement proposal along with a link "Click here to update the rates in this endorsement."

2. Select the link in the message.

   The **Update Pending WC Rates** screen is displayed.

3. Select the states whose rates you want to update.

4. Select *Update Rates*.

The policy is re-rated with the most recent applicable rate table.

> -ღ-   Policy changes will be created for each state that was updated with this action.
>
>   This also sets the ***uselatestrates*** field in the ***wc_state*** table to `true`. This indicates that these are the most recent rates available.

To override an entry in the Pending WC Rates screen

> -ღ-   You cannot add or delete entries from this list. You can only override the pending ***Rate Date*** or ***State Cov % Change*** fields for an entry.

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

2. In the ***Policies and Underwriting*** section, select ***Pending WC Rates***.

   Select the pending WC rate you want to edit.

3. Provide the relevant data.

4. Select ***Save Changes***.

   The changed entry now contains a blue dot next to the state and a red x icon.

To delete a manual override to an entry in the Pending WC Rates screen

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

2. In the ***Policies and Underwriting*** section, select ***Pending WC Rates***.

3. Select the red x icon next to the entry you want to delete.

   The information is reverted back to the original entry pulled in from the bureaus.

Claims administration

View check payments for multiple checks and claims on one page

Previously

Users could only view check payments on a single check or claim at a time because there was no index screen for check payments.

Now

Users can now configure the main menu to include the new CheckPayments domain, also called claim payments.

Once configured, a **Claim Payments** menu item is available from the main menu. When you select the new menu item, the **Claim Payments** screen displays multiple claims and checks.

How and where

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

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

3. Select the form set to edit.

4. In the **Navigation Configuration** panel, select **Main Menu**.

5. In the XML area, add `<domainMenuItem domain="CheckPayments"/>`.

6. Select **Save Changes**.

   The **Claim Payments** menu item is now available on the main menu.

Dashboards administration

Add additional options to interactive options on a dashboard

Now

You can now add additional options as interactive options on a dashboard to filter the data shown on certain widgets. For example, you can add the additional option **Valuation Date** to your dashboard interactive options, and widgets (created from the same data set as your filter) are updated to show the data as of the valuation date selected.

> 💡 When you add an additional option filter to the dashboard, it will override the corresponding field setting (if populated) on individual widgets, except **Group Occurrences**. If the **Group Occurrences** check box is selected on the widget but empty in **Additional Options**, the **Group Occurrences** check box will remain selected on the widget.

How and where

⚙️ **To add an additional option filter to your dashboard**

1. From your dashboard, select **Edit Dashboard**.

2. Select **Edit Settings**.

   The **Dashboard Settings** screen is displayed.

3. In the **Interactive Options** section, select **Use Interactive Options or Global Filter**.

   Additional fields are displayed.

4. In **Based on**, select **Report Data Set**.

5. In **Report Data Set**, select the data set that your widgets are based on.

   > 💡 Only the widgets that use the same selected report data set will be affected by the new interactive option field.

6. In **Interactive Options**, select **Select Interactive Options**.

   The **Select Interactive Options** screen is displayed.

7. To see the available interactive fields, select the field to open the drop-down, and then scroll to the bottom of the list to the **Additional Options** section.
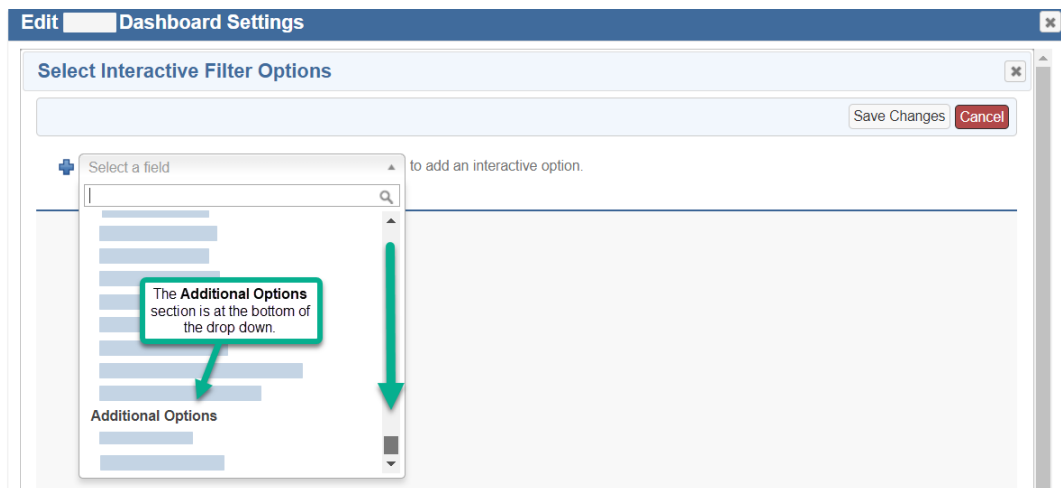
8. Select the fields.

9. Select **Save Changes**.

10. Provide any other relevant data.

11. Select **Save Changes**.

To use an additional option filter on your dashboard

> -ᗝ́- You must have additional options set up for this dashboard.

1. From the *Dashboard* view screen, in the *Additional Options* section, select *Show*.

2. Provide the relevant data to filter your dashboard.

3. Select *Apply Options*.

   Widgets that use the same selected report data set will update to match what you entered in additional options.

   > -ᗝ́- The additional options you entered will override the corresponding field setting (if populated) on individual widgets, except group occurrences. If the *Group Occurrences* check box is selected on the widget but empty in *Additional Options*, the *Group Occurrences* check box will remain selected on the widget.

Hide zero and null values on certain widgets

Now

When creating or editing a custom widget, a new check box is available on column, bar, line, stacked column, and stacked bar widget types that allow you to hide zero and null values. For existing widgets, this check box is not selected.

How and where

In the custom widget builder, the new *Hide Zero and Null values* check box is in the *Display Options* section.

Data entry events (DEE) administration

Add the time due on task actions, dashboards, and reports

Now

When creating automated tasks, you can now add the time a task action is due.

For manually added tasks, you can add the **Due Time** and **Due Time Zone** fields to your custom **Task** form.

On dashboards and reports, you can now convert the due time. For dashboards, this will automatically convert to the user's defined time zone. For reports, you must add a function in your template to convert the time. See instructions below. Otherwise, the **DueTime** field will pull without conversion.

⚙   We do NOT recommend adding the **Due Time Zone** field to your view **Task** form, dashhboards, reports, or index screen grid columns to avoid confusion for the following reasons:

- The **Due Time** field automatically converts the time to the user's current time zone on view screens, index screens, in user activities, and audit history.

- The **Due Time Zone** field does NOT convert the time zone to the time zone of the current user. It instead shows the time zone used to create the task.

> ⊘   Users can update their current time zone on the **My Profile** screen. To access this screen, from the main menu, select the gear > **My Profile**.

New and updated fields

New and updated fields on the **New Action** screen.

Due Date	The date by which the action needs to be completed.
	• If you want to enter an expression, use a relative expression. For example, to enter a due date for five days after the data entry event is triggered, enter `+5`.
	• You can enter the date manually or select the calendar icon.

> 💡 We recommend you use an expression for the action due date.

> 💡 If you enter a due date and a relative time, the system will use the due date supplied.
> If you leave this field empty and enter a relative time, when the event is triggered, the system auto-populates the due date based on the relative time.

Due Time	

> 💡 This field is disabled when a relative time is entered. When the event is triggered, the system automatically populates this field based on the relative time.

The time by which the action needs to be completed.
This time uses the due time zone.

• Enter the time using the `HH:MM AM/PM` format.

Relative Time	The time, relative to the event triggering, for the task to start.
	• Enter a relative expression. For example, to create a task that is due 24 hours after the event starts, enter: `+24` hours.

> 💡 If you enter a due date and a relative time, the system will use the due date supplied.
> If you leave the *Due Date* field empty, when the event is triggered, the system auto-populates the due date based on the relative time.

> 💡 After you enter a relative time, the *Due Time* field is cleared and disabled. When the event is triggered, the system auto-populates the due time based on the relative time.

Due Time Zone	The time zone of the task's due time.
	The default is your current time zone.

- If you want to change the time zone, select a time zone from the drop-down.

> ☀ If you have not set your current time zone on the ***My Profile*** screen (from the main menu, select the gear > ***My Profile***), this field will default to Eastern Standard Time (EST) for US servers or Greenwich Mean Time (GMT) for EU servers.

How and where

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

2. In the ***Fields, Labels and Forms*** section, select ***Date Entry Event***.

3. From the list, select the data entry event for which you want to add an action.

4. In the ***Actions Triggered by Event*** section, from the ***Create a new action*** drop-down, select ***New Action***.

To convert due time on reports

In your report template, add the following function as a formula column to convert the time.

```
  dbo.fn_AdjustedTimeZoneFormatted
(Tasks.DueTime,Tasks.DueTimeZone,'{CurrentTimeZone}')"
```

Data import center administration

Export and import notes

Now

You can now use the data import center to export and import notes in the system.

How and where

To export existing notes in the data import center format

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 **Export in Data Import Center Format**.

    The **Note_Import.xlsx** file download starts.

To import new notes

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

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

3. In the **Additional Templates** section on the right, search for "`Note`".

4. Select **Notes**.

    The **Note_Import.xlsx** spreadsheet template download starts.

5. From your hard drive, navigate and open the downloaded spreadsheet template.

6. Add new notes to the spreadsheet template following these requirements:

    • The **Parent Domain** field is required for every note. Enter the singular domain name, for example, Claim or Incident.

    • For each note, you must also fill in either the **Parent Match Fields** or the **Parent ID** field. If you fill in both fields, you will receive an error.

    • For the **Parent Match Fields** field, define to which records this note will be attached, using this formula:

      `matchfield=value.`

      Here are some examples:

      For claims: `ClaimNumber=123`

      For policies:
      `PolicyNumber=12345,EffectiveDate=5/28/2022,Coverage=Workers Compensation`

7. Provide the relevant data in the following columns: **Body**, **Author Name**, **Subject**, **Note Type**, and any custom fields.

8. Save the spreadsheet.

9. Import the spreadsheet into Origami.

Employee profiles administration

Daily overnight process creates link between record and requirement

Previously

To mark employee profile requirements complete, administrators perform manual searches for records that satisfy the requirement using **Add Certification**, per employee, per requirement. When found, administrators need to manually link the record to the corresponding employee profile requirement. This can still be true.

Now

A new overnight process has been added that compares employee profiles with records that could potentially satisfy the employee profile requirements. If this comparison finds a match, Origami will automatically create the link between the record and the requirement.

You can still perform the manual process if you need to link a record to a requirement prior to the next day's run of the automated process.

Alert icon updated to include all outstanding employee profile requirements

Previously

The alert icon on the **Employee** index screen only displayed next to an employee name when that employee had outstanding training or certification employee profile requirements.

Now

The alert icon on the **Employee** index screen is displayed when an employee has any outstanding employee profile requirements, for example, vaccination and health records.

> 💡 To improve the loading speed, any alert symbols will be displayed shortly after the screen is loaded.

New fields help identify individual records for employee profile requirements

Now

When adding a new employee profile requirement, if the requirement type uses domain filters, for example, testing and screening, you can now define what criteria is used to identify the individual employee, contact, or user records.

New fields

New fields on the *New Employee Profile Requirement* screen.

Match Employee With	Indicates the field used to identify individual employee records, for example, employee ID.
Match Contact With	Indicates the field used to identify individual contact records, for example, a custom contact identification field.
Match User With	Indicates the field used to identify individual user records, for example, a custom user identification field.

How and where

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

2. In the *Training and Certifications* section, select *Employee Profiles*.

3. Select the name of the employee profile you want to edit.

   The *Employee Profiles* screen is displayed.

4. Select *Edit Employee Profile*.

5. In the *Type* field, select a requirement type that uses domain filters, for example, testing and screening.

   The three new fields are displayed.

6. Provide the relevant data.

7. Select *Save Changes*.

Create certificate email templates for any requirement type

Now

You can now create certification email templates (which send reminder emails when certifications are missing, expired, or approaching their expiration date) for any type of employee profile requirement.

Certification email templates can also be sent to employees, contacts, or users.

New fields

New fields on the *Certification Email Template* screen.

Requirement Domains	Indicates the domains included in this email template. • Select the field, then select the domain. You can add other domains by selecting the field again.
Recipient Types	Indicates the individuals included in this email template. The following options are available: • *Assign All*: Includes employees, contacts, and users. • *Employees*: Includes employees only. • *Contacts*: Includes contacts only. • *Users*: Includes users only.

How and where

1. From the main menu, select *Admin*.
2. In the *Trainings and Certifications* section, select *Email Templates*.
3. Select *New Employee Notification*.
4. Provide the relevant data.
5. Select *Save Changes*.

The employee compliance report now includes employee profile requirements

Now

The compliance report now includes all employee profile requirements assigned to employees.

How and where

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

    The *Employee* index screen is displayed.

2. Select *More*.

3. Select *Compliance Reports*.

View the compliance report for contacts

Now

You can now view a compliance report that includes all employee profile requirements assigned to contacts.

How and where

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

    The *Contacts* index screen is displayed.

2. Select *More*.

3. Select *Compliance Reports*.

View the compliance report for users

Now

You can now view a compliance report that includes all employee profile requirements assigned to users.

How and where

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

    The *Users* index screen is displayed.

2. Select *More*.

3. Select *Compliance Reports*.

Enterprise risk management (ERM) administration

Add a team as an assessor on an ERM plan

Previously

The only option for adding members to assessments was individually selecting each assessor.

Now

A new icon now allows you to add the members of a team into the *Assessor* field for a risk so that you do not need to select each person individually.

How and where

1. From the main menu, select *ERM Plans*.

2. Select the ERM plan you want to edit.

3. Select *Edit ERM Plan*.

4. Next to the *Risk Assessor* field, select the three person icon.

   All the teams within Origami display.

5. Select the team(s) you want to add.

6. Select *Save Changes*.

Add a named user, anonymous user, or a team as an additional owner of a risk

Previously

You could only assign an owner and an executive owner to a risk.

Now

You can now also assign an additional owner to a risk, which can include a named user, anonymous user, or a team.

New Section

New section on the *Risk* screen.

Additional Owner	This section shows the additional owners of this risk. • To add an additional owner, select *Add Owner*.

How and where

1. From the main menu, navigate to *Risks*.

2. Select the name of the risk you want to edit.

3. In the *Additional Owner* section, select *Add Owner*.

4. Provide the relevant data.

> 🔅 If you want to add an anonymous user as an additional owner, type in the email address.

5. Select **Save Changes**.

Add an owner or additional owner as the assessor on an ERM plan

Previously

When creating assessments on the ERM plan, you could only assign the risk owner as an assessor.

Now

When creating assessments on the ERM plan, you can now assign the risk owner or additional owner as an assessor.

Learn how to add an additional owner to a risk

New fields

New fields on the **ERM Plan** screen.

Set Risk Owner/Additional Owner(s) as Assessor	Indicates if you can also choose a risk owner or additional owner as an assessor for this plan. Depending on your selection, risk owners, additional owners, or both owners are now available to select for the **Assessor Email** field. The following options are available: • **Only Owner** • **Only Additional Owners** • **Both Owners and Additional Owners**

How and where

1. From the main menu, select **ERM** > **Plans**.

2. Select the plan you want to edit.

3. Select **Edit ERM Plan**.

4. In the **Plan Risks** section, in the **Set Risk Owner/Additional Owner(s) as Assessor** field, select the relevant choice.

5. If you want to select a user as an assessor, select the magnifying glass icon to the right of the **Assessors Email** field.

6. If you want to select a team as an assessor, select the three person icon to the right of the *Assessors Email* field.

7. Select *Save Changes*.

Clear the previous score factor selections when scoring a risk

Previously

When you score a previously scored risk, the *Score Risk* screen opens with the previous score factors selected in the *Inherent Score Factors* and *Residual Score Factors* sections. This can still be true.

Now

With a new field, you can now configure the *Score Risk* screen to open without any score factor selections in the *Inherent Score Factors* and *Residual Score Factors* sections. This can clear up confusion caused when the preselected values affect the overall prior score shown on the screen.

New fields

New fields on the *ERM Lens* screen.

Default Factors to No Selection	Indicates if the *Score Risk* screen opens with or without the previous score factors selected. The default option is *None Selected*. The following options are available: • *Yes*: The screen opens with no score selections. • *No*: The screen opens with the previous scores selected. • *None Selected*: The screen opens with the previous scores selected.

How and where

To open the Score Risk screen without any previous score factors selected

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

2. Select *Lenses*.

3. From the list, select the lens whose setting needs updated.

4. Select *Edit Lens*.

5. In the *Default Factors to No Selection* field, select *Yes*.

6. Select *Save Changes*.

Manage surveys and allow data collection from within an ERM plan

Now

When this option is activated, you can now manage surveys and allow data collection from within an ERM plan. You can add assessor survey questions and allow assessors to enter information for a domain (for example, a risk or indicator) during their risk assessment. This can give you a more complete picture of the risks and plan. The assessor can also manually score any newly added risk.

> 🔅 If you want to use this feature, contact your Origami Service representative to update your system settings.

New Sections

The following two new sections are on the **ERM Plan** screen.

Data Collections	To configure the domains and domain fields used by assessors to enter additional information, for example, a risk or risk indicator, on the **Assessment** screen.
Survey Questions	To add assessor survey questions to the **Assessing** screen.

New sections are added to the **ERM Assessment Intake** screen. This is the assessor's main screen and lists all their assigned risks.

- This screen will contain a new section for each data collection configured, for example, if you configure a risk data collection, the new section will be called **New Risk Data Collection**. These new sections allow the assessor to enter and track new information, for example, risks, across all iterations.

The following new section is on the **Assessing** screen. This is the screen used by the assessor when assessing a specific risk.

Assessment questions	🔅 Available only when the ERM plan has survey questions defined. This section allows the assessor to answer survey questions for the selected risk.

The following new or updated sections are on the **ERM Plan Iteration** screen. This screen is accessed from the **ERM Plan** screen when selecting an iteration.

Plan Iterations	The new *Survey Answers* column contains links to access a compiled list of completed survey answers for the risk iteration.
	 💡 Available only when the iteration has survey questions defined.
	• To review survey answers by question, in the *Survey Answers* column, select the orange paper with question mark icon. The *Survey Assignments* screen displays. • To review survey answers by user, in the *Survey Answers* column, select the orange person with question mark icon. The *Survey Assignments* screen displays. • To download survey answers in Excel format, from the *Survey Assignments* screen, select the items to download and then select *Done Selecting*. The download is started automatically.
Data Collection Results	💡 Available only when the ERM plan has data collections defined.
	This section contains links to access a compiled list of information collected from all assignments for each data collection.

How and where

To allow assessors to enter information for a domain from the ERM Assessment Intake screen

1. From the main menu, select *ERM* and then select *Plans*.

2. Select an existing ERM plan or select *New ERM Plan*.

3. In the *Data Collections* section, select *Add Collection*.

4. In the *Domain* drop-down, select the domain whose fields an assessor can use to enter and track new information, for example, a risk or indicator.

> 💡 This drop-down only shows domains that contain at least one data collection template. To define a data collection template for a domain, in the *Data Collections* section, select *Templates*.

5. Provide the relevant data.

6. Select *Save Changes*.

Once you activate the ERM plan, when the assessor assesses their risks on the *ERM Assessment Intake* screen, they will have a new section for each configured data collection, for example, *New Risks data collection* or *New Indicators data collection*. Each section will show the selected fields in the data collection.

To setup a survey on an ERM plan

1. From the main menu, select *ERM* and then select *Plans*.

2. Select an existing ERM plan or select *New ERM Plan*.

3. When creating a survey, options include:

   • To add a question, in the *Survey Questions* section, select *Add Question*.

   • To add a conditional question that depends on a specific answer to an existing question, select the paper icon in the *Children* column for an existing question.

   > The following question types allow a conditional question on an answer: multiple choice, all applicable, star rating, and yes/no.

   • To quickly view conditional questions, hover your mouse over the blue down arrow icon.

      The conditional questions are shown.

   • To open a conditional question, shown with a blue down arrow icon, select the paper icon in the *Children* column for the parent question.

4. Provide the relevant data.

5. Select *Save changes*.

   Once you activate the ERM plan, when the assessor assesses a specific risk on the *Assessing* screen, the survey questions are in the *Assessment questions* section. This screen is accessed from the *ERM Assessment Intake* screen, when selecting a risk.

To activate an ERM plan

1. From the main menu, select *ERM* and then select *Plans*.

2. Select the ERM plan.

3. Select *More* and in the *Status* section, select *Set Active*.

Peer Review administration

Create and assign peer reviews on the same screen

Previously

Users had to create a peer review first, then navigate to the *Peer Review Case* screen and assign a reviewer.

Now

You can now create and assign peer reviewers and reviewees from the ***New Peer Review*** screen.

View 'review end date' and preliminary findings on the Peer Review Case screen

Now

On the ***Peer Review Case*** screen, the ***Peer Review*** panel displays information for the reviewer assignment's end date and any preliminary findings.

New fields

New fields on the ***Peer Review Case*** screen.

Review End Date	The date for which the assigned review ends.
Preliminary Finding	Summary of preliminary finding.

Updated permissions to edit peer review cases

Previously

To edit a peer review case record, a user had to be listed as the peer review coordinator on a given peer review case record or be listed as a committee member.

Now

Users with roles that have the edit peer review case permission can now edit records on the peer review case.

Updated permissions to view peer reviews

Previously

To view records in the ***Peer Review*** index screen, a user had to be listed as the peer review coordinator on a related peer review case. Additionally, to view a peer review record, a user had to be the peer review coordinator, a committee member, or assigned as a reviewer on a peer review case record.

Now

A user that has the view peer review permission can view records on the ***Peer Review*** index screen and access the peer review record.

Updated permissions to view performance improvement plans

Previously

To view a performance improvement plan record on the *Performance Improvement Plan* index screen and/or access a performance improvement record, a user had to be assigned as the peer review coordinator or as a committee member for the associated peer review case.

Now

Users with roles that have the view performance improvement plan permission can now view records on the *Performance Improvement Plan* index screen and access the performance improvement plan record.

Policies and billing administration

Configure the default columns of policy commission grid panels

Now

You can now configure the default columns for policy commission grid panels in search screen configuration.

How and where

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

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

3. Select the form set you want to edit.

4. In the *Search Screen Configuration* section on the right, select the policy commission's *Edit* or *New*.

Permission to view manual allocation field

Previously

On the *Insured Payment* screen, the visibility of the *Manual Allocation* field was controlled by an Origami setting.

Now

The visibility of the *Manual Allocation* field is now controlled by a permission.

New role permissions

New role permission on the *Permissions Assigned to Role* screen in the *Member Transaction* section.

Enable Manual Allocation	Indicates if this role can view the *Manual Allocation* field on the *Insured Payment* screen.

How and where

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

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

3. Select the role to update.

4. In the *Member Transaction* section, select *Enable Manual Allocation*.

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

Allow multiple change dates on endorsement first

Previously

You cannot create a single endorsement with multiple change dates attributed to different policy changes. This can still be true.

Now

When this option is activated, you can now set multiple change dates for policy changes under a single endorsement first process. This allows you to have the correct change dates for each individual policy change without starting a new endorsement for each change date.

> 💡 This option is not for clients, like ISO (International Organization for Standardization) and BCR, whose process requires users to create a single endorsement with a single effective date, then add additional changes to this endorsement.

New fields and buttons

New field on the *Edit Rating Program* screen.

Allow multiple dates on endorsement first	💡 Not visible if the rating program uses a BCR template that does not allow multiple dates. Indicates if you want to allow multiple change dates for policy changes on an endorsement. • If you want users to create a single endorsement with multiple change dates attributed to different policy changes, select this field. The *Modify Change Effective Date* button is displayed on the *Endorsement* screen. • If you want users to create a single endorsement with a single effective date, then add additional changes to this endorsement, leave this field empty. The *Modify Change Effective Date* button is hidden on the *Endorsement* screen.

New button on the *Endorsement* screen

Modify Change Effective Date	⚙️ Visible only if *Allow multiple dates on endorsement first* is selected on the rating program. When this option is activated, you can now set multiple change dates for policy changes under a single endorsement first process. This allows you to have the correct change dates for each individual policy change.

How and where

⚙️ **To allow multiple change dates for policy changes on an endorsement**

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

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

3. Select the rating program you want to edit.

4. Select *Edit Rating Program*.

5. Select *Allow multiple dates on endorsement first*.

6. Select *Save Changes*.

To modify the change effective date on an endorsement

1. Navigate to an endorsement that is configured to allow multiple dates.

2. Select *Modify Change Effective Date*.

3. Enter the change effective date.

4. Select **Submit changes**.

> 💡 Policy changes made after each "Modify Change Effective Date" will use the new effective date.

Configure the columns or search fields displayed for broker offices

Now

You can now configure the columns or search fields displayed on the **Broker Office** index screen and when the broker office information is shown on other screens, for example the **Broker Office** section on the **Agency** or **Broker** screens.

How and where

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

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

3. Select the form set you want to edit.

4. In the **Search Screen Configuration** section on the right, select the broker office's **Edit** or **New**.

Show four policy fields on the new endorsement screen

Now

When this option is activated, you can view the following read-only policy fields on the **New Endorsement** screen.

Insured	Displays the owner of the policy.
Policy Number	Displays the identification number of the policy.
Effective Date	Displays the start date of the policy.
Expiry Date	Displays the expiration date of the policy.

> 💡 If you want to use this feature, contact your Origami Service representative to update your system settings.

How and where

To view the four policy fields on the New Endorsement screen

1. Navigate to the policy.

2. Select *Create Endorsement*.

    The four policy read-only fields are displayed on the *New Endorsement* screen.

Rating programs administration

Reports administration

Change the default formatting, margins, or confidentiality text for reports exported to Excel

Now

When these options are activated, when exporting a report to Excel, you can now use the report's selected custom template theme to override the default export settings. Custom template themes include customizations for the header, footer, font size, font color, and shading color. You can also override the default margins or the confidentiality text of the Excel export.
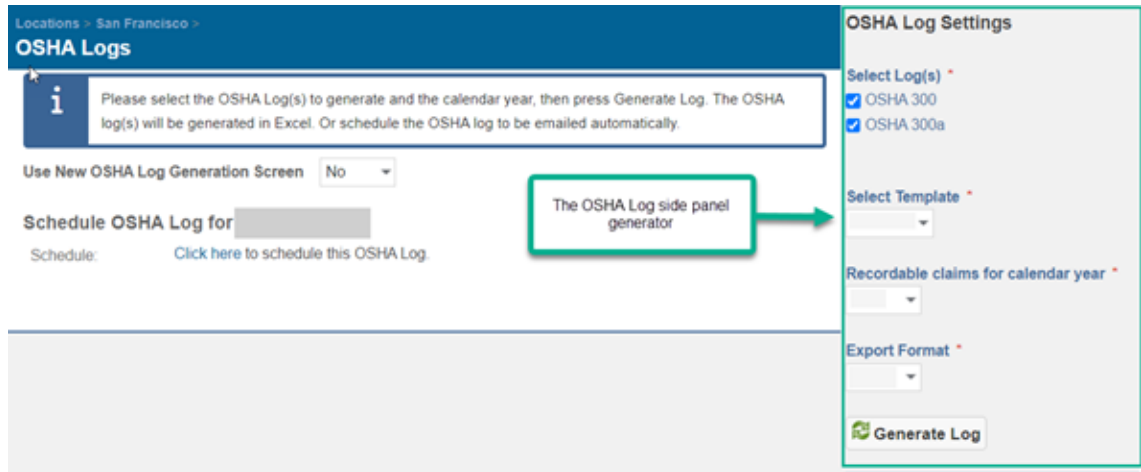
> 💡   To enable any of these features, contact your Origami Service administrator.

Use the new advanced OSHA log screen

Previously

You could only use the *OSHA Log* side panel generator, shown below, to run an OSHA log. This screen contains limited options for creating the report. For example, the log only covers one location or territory, and only spans one year.

Now

You now have the option to use the new advanced *OSHA Log* generator screen, shown below, or the original side panel *OSHA Log* generator, shown above. This gives you more options to configure and define what data goes into these reports.

You can now also generate OSHA logs from the *Administration* section for any location or territory.

New fields

New fields on the advanced *OSHA Logs* screen.

Use New OSHA Log Generation Screen	Determines which screen you want to use to create your OSHA log. • To use the advanced generator screen, select **Yes**. • To use the side panel generator screen, select **No**.
Choose a Template	Select a template that pre-fills fields on this screen with specific settings. ⚙ This drop-down only displays pre-defined OSHA templates. To define an OSHA template, in the main menu, select **Admin**, and in the **Locations and Values** section, select **OSHA Log Templates**.
Territories	Select up to five territories included in this report. This will create a separate report for each year and territory selected. 💡 You can only select five total territories and locations.
Locations	Select up to five locations included in this report. This will create a separate report for each year and location selected. 💡 You can only select five total territories and locations.
Claim Filter	Select the claims included in this report.
Incident Filter	Select the incidents included in this report.
Number of Records per page	Enter the maximum number of records displayed on each page.
Report Year From	Indicates the start year. This will create a separate report for each year and territory/location selected. 💡 The report year range cannot be over five years.
Report Year To	Indicates the end year. This will create a separate report for each year and territory/location selected. 💡 The report year range cannot be over five years.

Date Run on Report	Indicates the date this log is ran. • You can enter the date manually or select the calendar icon for more options.
Select Private Column(s)	Indicates if you want to mask certain columns on the log for privacy, for example, claim number. The selected information is shown as "---" on the report. • Select the field, then select the column to mask. You can add another column by selecting the field again.
Use Counter for column A	Indicates if you want the first column of the report to show a running count.
Signature	Indicates what signature, if any, is used for this report. • To show the signature of the location, select ***Default Signature***. • To show the signature of the user that is pulling the report, select ***User Signature***. • To not include a signature, select ***None***.
Orientation	Indicates the page orientation for this log. The default value is ***Portrait***. The following options are available: • ***Portrait*** • ***Landscape***
Column F Override (Claims)	Indicates, for claims, if the description of the event in column F is overridden with another field. • To replace the description in column F, enter the form tag. For example, `{CustomText1}`. • To keep column F unchanged, leave this field blank.
Column F Override (Incidents)	Indicates, for incidents, if the description of the event in column F is overridden with another field. • To replace the description in column F, enter the form tag. For example, `{CustomText1}`. • To keep column F unchanged, leave this field blank.
Use California Template	Indicates if you want to use the standard California OSHA log template.

New Administration section

New section in the *Location and Values* section.

OSHA Generate Log (s)	To generate OSHA logs on up to five territories or locations, for up to five years.

How and where

To create an OSHA log for a specific location or territory

> -ᗅ̣- This report is limited to a span of one year.

1. From the main menu, select *Locations* or *Territories*.
2. Select the location or territory.
3. From the *More* menu, and in the *Reports* section, select *OSHA Logs*.

   The advanced *OSHA Logs* screen is displayed.
4. To switch to the side panel *OSHA Logs* screen, from the *Use New OSHA Log Generation Screen* field, select *No*.
5. To switch to the advanced *OSHA logs* screen, from the *Use New OSHA Log Generation Screen* field, select *Yes*.
6. Provide the relevant data.
7. Select *Generate Log*.

To create an OSHA log for up to five locations and territories

> -ᗅ̣- This report is limited to a span of five years.

1. From the main menu, select *Admin*.
2. In the *Locations and Values* section, select *OSHA Generate Log(s)*.

   The advanced *OSHA Logs* screen is displayed.

   > -ᗅ̣- You cannot switch to the side panel *OSHA Log* screen.

3. Provide the relevant data.
4. Select *Generate Log*.

Create OSHA log templates

Now

You can now create OSHA log templates for use anywhere OSHA logs are generated or scheduled in the system.

How and where

⚙ To create an OSHA log template

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

2. In the *Locations and Values* section, select *OSHA Log Templates*.

3. Select *New OSHA Log template*.

4. Provide the relevant data.

5. Select *Save Changes*.

   The OSHA log template is now available for use.

To create a schedule using an OSHA log template from a location or territory

1. From the main menu, select *Locations* or *Territories*.

2. Select an OSHA location.

3. Select *More* and then *OSHA Logs*.

   The *OSHA Logs* generator screen is displayed.

4. In the *Schedule* section, schedule the OSHA log.

5. In the *Choose a Template* drop-down, select the OSHA log template.
   The fields are updated based on the template's settings.

6. Update any relevant data.

7. Select *Save Schedule*.

To create an ad hoc OSHA report using an OSHA log template

1. From the main menu, select *Locations* or *Territories*.

2. Select an OSHA location.

3. Select *More* and then *OSHA Logs*.

   The *OSHA Logs* generator screen is displayed.

4. In the *Choose a Template* drop-down, select the OSHA log template.
   The fields are updated based on the template's settings.

5. Update any relevant data.

6. Select *Generate Log(s)*.

   The OSHA report is created.

Create OSHA 300/300A reports only on incidents or claims

Previously

You can only run OSHA 300/300A logs from incidents, unless there is a claim associated with an incident, then the data is pulled from the claim instead. This can still be true.

Now

When this option is activated, you can now run OSHA 300/300A logs just on claims or incidents.

> If you want to use this feature, contact your Origami Service representative to update your system settings.

After this option is activated, user role permissions need updated to manage OSHA data from an incident.

New role permissions

New role permission on the ***Permissions Assigned to Role*** screen in the ***Incident*** section.

Manage OSHA Data	Indicates if this role can access the ***Manage OSHA Data*** button or menu item from an incident or claim.

How and Where

⚙ To update the relevant permissions

1. At the account level, from the main menu, select ***Admin***.
2. From the ***Users and Security*** section, select ***Roles***.
3. Select the role to update.
4. Select ***Apply Filter to Area Names selected*** and then search for `Incident`.
5. In the ***Incident*** section, update the ***Manage OSHA Data*** permission.
6. In the top right of the ***Permissions assigned to Role*** section, select ***Save Permissions***.

To manage OSHA data

> A user must have their permissions updated to use this functionality.

1. Navigate to an incident or claim that is OSHA recordable.

2. Either select the *Manage OSHA Data* button, or from the *More* menu, select *Manage OSHA Data*.

View or edit private distribution lists

Previously

Users could not see other user's private distribution lists. If a report had a distribution list set to private, only the user who set the distribution list to private could change to whom the report was sent.

Now

New role permissions have been created to grant permission to view and/or edit private distribution groups.

New role permissions

New role permissions on the *Permissions Assigned to Role* screen in the *Private Distribution List* section.

View Private Distribution List	Indicates if this role can view private distribution lists marked as private.
Edit Private Distribution List	Indicates if this role can edit private distribution lists marked as private

How and where

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

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

3. Select the role to update.

4. In the *Private Distribution list* section, do one of the following:

   - To grant permission for this role to view private distribution lists marked as private, select *View Private Distribution List*.
   - To grant permission for this role to edit private distribution lists marked as private, select *Edit Private Distribution List*.

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

Users can view and edit their own private distribution list regardless of if they have the new permissions or not.

System users

System-wide

Review assessments show latest comment and file

Previously

For review assessments, you were unable to easily see if an assignee had left comments. You needed to click into the **Status** field to view the comment.

Now

When an assignee has left a comment, an icon now appears next to the **Status** field. Hovering over the icon displays the latest comment left by the assignee. Additionally, if the assignee had to sign during the review, additional icons will display for the file. These icons allow you to preview and download the file. You still have the ability to click into the **Status** field to view all of the detailed action log.

New Icons

New icons on the **Review Assessment** screen.

	See the latest comment left by the assignee.
	Preview the file.
	Download file.

Claims

Loss date and report date now pre-populate on new loss events

Previously

When entering a new loss event, you first search for the policy on the **Policy Snapshots** screen using the policy number, loss date and report date. When you opened the **New Event** screen, you had to reenter the start date and report date.

Now

When entering a new loss event, you first search for the policy on the *Policy Snapshots* screen using the policy number, loss date, and report date. Now, when you open the *New Event* screen, the *Start Date* and *Report Date* fields are automatically populated with your search information from the *Loss Date* and *Report Date* fields.

Data entry events (DEE)

View user assigned action DEE emails from parent record

Now

You can create a data entry event (DEE) for a user assigned action that sends an email or grant access email.

Once sent, the email now displays on the parent record in the *Recent Emails* section, on the right.

Document controls | Policies and procedures management (PPM)

Document control repository filter displays can be customized

Previously

When you accessed a document control repository filter link, you were taken to the repository and shown whichever columns and search fields were defined for your form set. You had no ability to define a different screen per filter.

Now

You can now customize your columns and search field displays for each repository filter in the system. This allows you to further customize your document repository views to show fields that are relevant to users.

How and where

1. From the main menu, select *Document Controls*.

   The *Document Controls* index screen is displayed.

2. Select *More*, and in the *Repository Filters* section, select *Manage Filters*.

3. Select the repository filter to edit.

4. Use the following fields to create and manage filters for the different document control repository filters.

- **Column Definition** – Allows you to specify the columns shown in the view.
- **Search Fields** – Allows you to define the filtering fields shown in the side panel.

Enterprise risk management (ERM)

Associate locations with a control

Now

On the **Control** screen, you can now associate locations with a risk control. The new associations can also be viewed in the **Connections** sunburst chart. (Sunburst charts are a visual representation of all associations.)

How and where

To associate locations with a control

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

2. Select the title of the control you want to edit.

3. Select **More**.

4. In the **Associated** section, select **Locations**.

   The **Locations** screen is displayed.

5. In the **Location Number** column, select the check box of the location you want to associate with this control.

6. Select **Done Selecting**.

7. To view the new location connections in the sunburst chart, select **Connections**.

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

Bulk close assessments that have not started

Now

You can now bulk close assessments that have not started. The newly closed assessments have the status: **Did Not Respond**.

How and where

> 💡 To make these changes, you must be the plan owner.

1. Select an active ERM plan.

2. In the **Plan Iterations** section, select the active plan whose assessments you want to bulk-close.

3. Select **More**, and in the **Bulk Actions** section, select **Bulk Close Assessments**.

> 💡 If you can not see the **More** menu, you are not the plan owner.

4. Select the assessments you wish to bulk-close.

> 💡 You can only close assessments that did not start.

5. Select **Close Selected Assessments**.

   In the **Plan Risks** section, in the **Status** column, the statuses of the closed assessments are now **Did Not Respond**.

Create an ERM heat map widget using any lens

Previously

When creating an ERM heat map, you could only select a lens that contained two or three factors.

Now

When creating an ERM heat map, you can now select any lens in the system that has at least two factors defined. When you select a lens that contains more factors than allowed for the heat map, you can then decide which of the factors to plot.

How and where

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

2. If you have more than one dashboard, select the dashboard you wish to edit.

3. Select **Edit Dashboard**.

4. Edit an existing ERM heat map widget or select **Add Widget** and select an ERM heat map widget.

   The **Edit Dashboard Widget** screen is displayed.

5. In the *Inherent Score Lens* or *Residual Score Lens* field, select the lens.

6. If the lens selected contains more factors than the widget allows, in the *Factor used for...* drop-down, select the factors to use for this widget.

> 💡 The factors shown in the drop-downs match the order the factors are used in the methodology's inherent or residual scoring formula. The lens determines which methodology is used.

7. Select *Save Changes*.

Heat Map 3 dashboard widget now uses a ranking system

Now

The *Heat Map 3* dashboard widget has been reconfigured to rank plotted risks from highest to lowest total score. The highest scored risk is bubble number one and all risks of equal score get the same rank number shown on their bubble.

The bubble placement has also been improved within the quadrants.

From the widget's new 3-dot menu, you can now: edit, refresh, go full screen, and email as PDF.

How and where

When you create a new custom widget, select the *ERM Heat Map 3* widget type.

Heat Map 3 dashboard widget updated to show more risk details

Previously

In the *ERM Heat Map 3* dashboard widget, when selecting a quadrant, you could only see the risk name, ID, and score for the first risk in the section.

Now

The *ERM Heat Map 3* widget, when selecting a quadrant, now shows the rank, risk name, and score for each risk within the quadrant selected.

How and where

When you create a new custom widget, select the *ERM Heat Map 3* widget type.

Heat Map 3 dashboard widget's full screen view updated

Now

When viewing the *ERM Heat Map 3 Residual* or *ERM Heat Map 3 Inherent* in full screen, the information now matches the widget. For example, risks are now grouped by quadrant (matching x and y coordinates) and the information shows the rank, risk name, and score.

How and where

To create the widget

When you create a new custom widget, select the *ERM Heat Map 3* widget type.

To view the widget in full screen

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

   > ✓ If the widget is not on your main dashboard, select *More* > *More Dashboards*. From the list, select the dashboard that contains this widget.

2. Navigate to the *ERM Heat Map 3* widget.
3. In the top right corner, select the three dots icon.
4. Select *Full Screen*.

Roll-up the average or highwater child risks score to the parent risk

Previously

When calculating the child-level risk score on a parent-level risk, you had to manually add the roll-up score from the child risk level.

Now

When calculating the child-level risk score on a parent-level risk, you can now calculate and save the average or highwater score from all scored child risks. You can also create a data entry event that automatically updates the child rollup score on a parent risk when users update a child score.

New fields

New fields on the *ERM Lens* screen.

Roll Up Score to Parent Risk	Indicates the type of roll-up score used when calculating the child-level risk score on a parent-level risk. The default value is *None Selected*. The following options are available: • *None Selected*: The score does not roll-up to the parent level. • *Average*: The average score of all scored child risks. • *Highwater*: The highest score of all scored child risks.

How and where

To set up the roll-up type on a Lens

> � You cannot change the roll-up type after you have scored the child roll-up risks on a parent risk using this lens.

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

2. Select *Lenses*.

3. From the list, select the lens whose roll-up type needs set up.

4. Select *Edit Lens*.

5. In the *Roll Up Score to Parent Risk* field, select the type of roll-up to use.

6. Select *Save Changes*.

To manually roll-up child risk scores to a parent risk

> 💡 If there are child records that have not been scored, those will not be included in the roll-up score. If no child records have been scored, no roll-up scoring will occur.

1. Navigate to the parent level risk.

2. In the *Lens* field, select the lens you want to use to roll-up the score.

   > ✓ You can score this risk using different lenses. Select a different lens to calculate or view the scoring results based on the selected lens's roll-up type.

3. Select *Score Child Rollup Risks*.

   > 💡 This button is displayed after you select a lens that has a defined roll-up type.
   >
   > Roll-up types are defined on the lens in the *Roll Up Score to Parent Risk* field. Types include *Average* or *Highwater*.

4. Enter any comments.

5. Select *Complete*.

To create a DEE that updates the child roll-up risks score on the parent risk

> ✓ We recommend creating a DEE for both *Risk Assessments (ERM Plans)* and *Risk Assessments (Manual Scoring)*. With both DEEs created, when a user scores a child risk from the risk itself or from the plan assignments, the parent risk's child roll-up risk score is automatically updated with that change.

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. In the area list, select *Risk Assessments (ERM Plans)* or *Risk Assessments (Manual Scoring)*.

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 *Domain Specific Action*.

9. Enter a description.

10. Select **Rollup score to parent**.

11. Select **Save Changes**.

See all associations when assessing a risk

Previously

When assessing a risk, you could only see the associated controls on the **Risk Assessment** screen.

Now

When assessing a risk, you can now see all associations on that risk, for example, assets or locations, on the **Risk Assessment** screen.

Select an ERM factor name for better reporting

Now

For better reporting, the ERM factor **Name** field has been converted from a text field to a drop-down list with 33 available options.

New Fields

New fields on the **New Factor** screen.

Name	Indicates the name of this factor. • If you want to enter a custom name, leave the default **None Selected** value, and enter the name in the **Custom Name** field. 💡 To avoid reporting errors, the factor names that are already used do not appear in the drop-down. For example, if you have a factor named Severity, you will not see the Severity value in the drop-down.
Custom Name	💡 Available only when **None Selected** is selected in **Name**. Indicates the custom name of this factor.

How and where

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

2. Select **Factors**

3. Select **New Factor**.

4. Provide the relevant data.

5. Select **Save Changes**.

Score a risk against any lens

Previously

You could only score a risk against the default lens or a lens the risk had been scored against previously. The workaround was to change the default lens.

Now

You are now able to select a scoring lens from the following lenses in the system:

- Lenses whose validity end date is set to today or after.

- Lenses without a validity end date.

- Lenses that were already used to score against this risk, even if their validity end date is set to a date in the past.
  These previously used lenses are kept for a historical record.

How and where

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

2. Select the name of the risk you want to edit.

3. In the **Scoring Lens** drop-down, select the lens.

4. Select **Score Risk**.

Sort the risks, controls, and governances lists by score or rating

Now

You can now sort your risks, controls, and governance lists using the **Score** or **Rating** column.

How and where

1. From the main menu, navigate to **Risks**, **Controls**, or **Governance**.

   The **Risks** index screen, **Controls** index screen, or **Governance** index screen is displayed.

2. To sort the list by score, select the down or up arrow next to the **Score** column name.

3. To sort the list by rating, select the down or up arrow next to the **Rating** column name.

Policies and billing

Support for partial allocations and overpayment on agency statement

Previously

You were unable to complete an allocation without fully spending the agency payment.

Now

You can now complete partial allocations of agency payments. Unspent payments are available on the *Agency Payment* screen for a future allocation.

How and where

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

2. Select the agency you want to pay.

3. In the *Recent Invoices* section, select *Go to Invoices*.

4. From the list, select the agency payment.

   The *Agency Payment* screen is displayed.

5. Select *Allocate Payments*.

6. Enter a partial amount for one of the invoices.

7. Select *Complete Allocation*.

   Unspent payments are available for a future allocation on the *Agency Payment* screen.

Update payment details for an agency payment

Now

When this permission is granted, you can now update payment details, including the transaction date, payment check number, and memo, on a completed agency payment transaction.

New role permissions

New role permission on the *Permissions Assigned to Role* screen in the *Agency Transaction* section.

Edit Read-Only	Indicates if this role can update payment details, including the transaction date, payment check number, and memo, on a completed agency payment transaction.

How and where

⚙ **To update the relevant permissions**

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

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

3. Select the role to update.

4. Search for *Agency Transaction* and select *Apply Filter to Area Names selected*.

5. In the *Agency Transaction* section, update the *Edit Read-Only* permission.

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

To update agency payment details

> 💡 A user must have their permissions updated to use this functionality.

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

2. Select the agency for which you want to update a payment.

3. In the *Recent Invoices* section, select *Go to Invoices*.

4. From the list, select the completed agency payment.

    The *Agency Payment* screen is displayed.

5. Select *More*.

6. Select *Edit Payment Details*.

7. Update the relevant data.

8. Select *Save Changes*.

Deallocate an agency payment

Now

You can now deallocate a partially or fully allocated agency payment.

How and where

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

2. Select the agency for which you want to deallocate a payment.

3. In the **Recent Invoices** section, select **Go to Invoices**.

4. From the list, select the agency payment.

   The **Agency Payment** screen is displayed.

5. Select **More**.

6. Select **Deallocate Payment**.

7. Provide the relevant data.

8. Select **Deallocate Selected**.

Deallocate a payment on a billing account

Now

When this permission is granted, you can now deallocate a payment on a billing account.

New role permissions

New role permission on the **Permissions Assigned to Role** screen in the **Billing Payment** section.

Deallocate Payment	Indicates if this role can deallocate a payment from the **Billing Payment** screen.

How and where

⚙ **To update the relevant permissions**

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

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

3. Select the role to update.

4. select *Apply Filter to Area Names selected* and search for `Billing Payment`.

5. In the *Billing Payment* section, update the *Deallocate Payment* permission.

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

To deallocate a payment

> -�- A user must have their permissions updated to use this functionality.

1. Navigate to a billing account.

2. In the *Recent Payments* section, select the previously allocated payment that you want to deallocate.

3. Select *More*, and in the *Billing Payment* section, select *Deallocate Payment*.

    The *Deallocate Payment* screen is displayed.

4. Deallocate the funds, as needed.

5. Select *Deallocate*.

Edit a pending policy return check

Now

When this option is activated, you can now edit the payee address or memo of a pending policy return check.

> -ᴗ́- If you want to use this feature, contact your Origami Service representative to update your system settings.

Wallet support for multiple merchant accounts in OneInc

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

Now

When making a payment using OneInc, you can now save payment information on a key group. Key groups are used when you have more than one merchant account.

Update agency or broker information without rewriting the policy

Now

You can now change the agency/broker, agent, or broker office without canceling and rewriting the policy. Instead, a new 'change agency information' endorsement is created. The commission is recalculated for the incoming agency or broker and commission financials are updated on the policy to reflect the change.

> 💡 The 'change agency information' endorsement type can only update agency/broker information on the policy. For any other mid-term changes, use the regular endorsement workflow.

How and where

1. Navigate to an existing bound policy.
2. From the **More** menu, in the **Policy** section, select **Change Agency Information**.
3. Update the relevant data.
4. Select **Save and Create Endorsement**.

    A new endorsement is created on the policy.

View all invoices when making an online payment

Previously

When making an online payment, all invoices due were compiled into one invoice, which caused confusion.

Now

When making an online payment, each invoice due is now listed on a separate line. If you make a partial payment, the payment is allocated from the oldest to the newest invoice.

Fixed

System administrators

System-wide

Specify user roles when creating email templates

Previously

Email templates were available for all users within the client when some users should not have had the ability to use email templates.

Now

In the email template, users can now assign role access. This ensures only roles assigned to the email template have access to the email template. If there are no roles selected, the email template will still be available to all users within the client.

New fields

New fields on the *Email Template* screen.

Role Access	Indicates the roles that have access to the email template.

How and where

On the *Email Template* screen, in the *Roles Access* list, select the roles that have access to the email template.

System users

Policies and billing

You can now enter a zero dollar amount estimated payroll for workers compensation (WC)

Previously

When the estimated payroll for WC was unknown and you entered a zero dollar amount payroll, you received an error.

Now

When the estimated payroll for WC is unknown, you can now add a zero dollar amount payroll on the payroll schedule. Pay as you go reporting also supports the zero dollar amount estimated payroll.