

# Lightspeed Data Solutions

## Release Notes

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### Claim

#### Application Tree: Icons

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4936

**Issue:** New icon for v5.x. Let's try this for now: For all items under Form use fn1682.bmp, for all reports use fn2688.bmp and for all Table items use fn1682.bmp. For Search and Payment lets use the same as the buttonfaces from the dropdown toolbar.

**Resolution:**

USER: Various features now have unique icons in the main menu tree.

#### Automation Scheduling:

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4941

**Issue:** Currently we have flexible scheduling for AutoPay processing. In Claim 5.x will be adding several automated processes to be executed by the system (either MSSQL or LSScheduler). Those processes will mainly be reports, imports and exports. Please develop a screen similar to the MSSQL Job Activity Monitor to show scheduled job last run time and status and next run time. Autopay can be the first items to be reported in this screen. Additionally we should be able to schedule Memorized Flex reports and Memorized Exports.

**Resolution:**

USER: This feature now shows status of scheduled jobs.

#### Bill Review: EOR Printing

**Release:** 4.14a      **Task Type:** Bug      **External Ref:**      **Case No:** 5080

**Issue:** Lightspeed generated EORs' for the UCJ do not display Procura's name, address and telephone number in the header. The problem seems to be only with the UCJ. All the other EORs' are correct.

**Resolution:**

USER: Fixed

#### NJPLIGA ONLY

#### Bulk Reassignment:

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4971

**Issue:** Please add criteria for Fund and Claim Type to both tabs. Add column filter to the grids on each tab.

**Resolution:**

USER: Fund and Claim types have been added as criteria for selecting claims to be updated.

#### Check - PSQ:

**Release:** 4.14c      **Task Type:** Test Bug      **External Ref:** 9109      **Case No:** 5237

**Issue:** On the Payment Stamp screen the Payee is displaying an 8 in the drop down field

**Resolution:**

USER: Payment stamp is displaying the correct information

#### NJPLIGA,IIGF ONLY

#### Check: Account Assignment

**Release:** 4.14c      **Task Type:** Enhance      **External Ref:**      **Case No:** 5253

**Issue:** We currently can determine checking account based on a single field criteria. NJIGA would like to expand this to 2 fields. Please replace the Map Column and Values fields with a WHERE Clause field. Please populate this field for existing accounts based on the Map Column and Values entries.

**Resolution:**

USER: System will now support more complex criteria for determining checking account

#### NJPLIGA,CFP ONLY

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### Claim Maintenance - Auto: 5.00 Redesign

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5042

**Issue:** New system design for v5.x; redo the screen similar to the work done on Claimant where there is only one page but the lower portion is changable through buttons. Move the Synopsis to Detail generated from a 'Synopsis' Button. Add a Description button with same functionality as the one on the Claim tab. Add a Driver button that will detail the Driver info for the vehicle selected in the grid, Add an Owner button that will detail the Owner info for the vehicle selected in the grid. Vehicle info will be available from either the Driver or Owner details.

**Resolution:**

USER: This tab has been re-designed using the v5.00 model.

### Claim Maintenance - Auto: Screen Changes

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4968

**Issue:** County - Move this to the Loss Location pop-up (see case 4962). Make the Loss Location pop-up available from this screen. Auto Grid: Add column sort and filter to the grid. Have the detail automaticall displayed for the select vehicle, changes as the user scrolls thru vehicles.

**Resolution:**

USER: Done

### Claim Maintenance - Claim Page 2: UDS Tab

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4961

**Issue:** Please make the old UDS tab into Page 2 of the Claim Tab.

**Resolution:**

USER: Done

### Claim Maintenance - Claim:

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 4986

**Issue:** On the Claim tab there is an empty space at the botton of the screen. This space should be populated when the user clicks the Location or File Location buttons. Instead of opening a popup screen, they shoudl instead fill in the bottom of the screen.

**Resolution:**

USER: Screen has been redesigned.

### Claim Maintenance - Claim: Close Due to Bar Date

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5134

**Issue:** New UDS transaction 031 for claims closed due to bar date. Please add a close reason "BARDATE" - "Claim Beyond Liquidation Bar Date". Please modify the UDS C Exports to translate the close transaction from 030 to 031 when this close reason is used.

**Resolution:**

USER: New close reason has been added to support new UDS transaction 031

### Claim Maintenance - Claim: MSP Fields

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4929

**Issue:** Please add the following to support the MSP enhancement: Section 111 Date of Incident (DOI) .

**Resolution:**

USER: Field has been added

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### Claim Maintenance - Claim: Screen Changes

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4959

**Issue:** LOB - Move to the Policy tab and distinguish Policy LOB from Claim LOB.  
Type - Reposition Type to the old location of LOB.  
Claim Ref - Move to Claim2(UDS tab)  
Std LOB - Move to Policy tab and distinguish Policy StdLOB from Claim StdLOB.  
Master Coverage - Shorten (need to allow for a 7 digit numeric code)  
Claim Insured - Shorten  
Agent - Move to Policy tab  
2nd Fund - Move to Claim2(UDS tab)  
MG# - Move to Policy tab  
Sect 111 DOT - relabel MSP DOI and move to Claimant Medical

**Resolution:**

USER: Screen has been redesigned

### Claim Maintenance - Claim: Status Button

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4967

**Issue:** Make status label a button. Remove the Close and Reopen Reasons; replace with a grid on the Status Button Pop-up that lists Claim level Open, Close and Reopen transactions for the claim, including the Close and Reopen Reasons. Grid should have column sort and filter but should default to descending date order. Lower portion should have a generic reason list with a label button to change the status; button title would be Close if the claim current status is Open/Reopen, or Reopen if the current Status is Closed, the reason list would be filtered based on the action being initiated.

**Resolution:**

USER: Screen has been redesigned

### Claim Maintenance - Claimant:

**Release:** 4.14b      **Task Type:** Task      **External Ref:**      **Case No:** 5106

**Issue:** When a new suffix is added the Claimant should be reevaluated with regards to its MSP status. If current status is Exempt and coverage on new suffix is Reportable or Conditional make the MSP status Nominee. ORM should also be re-evaluated, any yes is a yes.

**Resolution:**

USER: When a new suffix is added the Claimant's MSP status will be reevaluated.

**Release:** 4.14b      **Task Type:** Task      **External Ref:**      **Case No:** 5126

**Issue:** For the Claimant Birth Date we need to restrict the allowable dates to the range of 200 years ago upto the present date. If the user enters a date before 100 years they should get a warning

**Resolution:**

USER: Edit checking has been added to the Birth date field.

**Release:** 4.14b      **Task Type:** Bug      **External Ref:**      **Case No:** 5137

**Issue:** For the HICN on the Medical popup we need to allow up to a total of 12 characters for the field, the entry can be composed of up to 3 letters and 9 numbers. They should not be allowed to enter hyphens

**Resolution:**

USER: HICN will now support 12 characters. Hyphen should be omitted.

### Claim Maintenance - Claimant: 5.00 Redesign

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4927

**Issue:** New system design for v5.x

**Resolution:**

USER: Screen has been redesigned.

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### Claim Maintenance - Claimant: Contact Detail

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5038

**Issue:** Need to support multiple contacts for the claimant for issues where the claimant has a Guardian, Power of Atty or other representative. Please move this contact info to a separate table that supports one to many contacts per claimant. Add a Claimant Contact type to include these values from CMS: A = Attorney G = Guardian/Conservator P = Power of Attorney O = Other, Space = None (contact claimant directly). The Atty value should default from the claimant atty info which is from vendor, user can edit any info in the contact screen; but vendor remains unchanged for payments. The display should default to the atty if there is one, then to G then to P and if none exist it would be the claimant info.

**Resolution:**

USER: Now supports multiple MSP contacts

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**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5419

**Issue:** Contacts needs to support First, MI, Last and Full names plus Firm name.

**Resolution:**

USER: The First/Middle/Last names have been added to the screen as well as Full/Firm names

### Claim Maintenance - Claimant: Entity Type

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5120

**Issue:** Please add an Entity Type dropdown to indicate if the Claimant is an 'Individual' or 'Organization'. Backfill existing data; if first name field has been populated then default to 'Individual' otherwise set to 'Organization'.

**Resolution:**

USER: Screen now supports entity type for MSP

### Claim Maintenance - Claimant: ICD9 Diag Codes

**Release:** 4.14b      **Task Type:** Bug      **External Ref:**      **Case No:** 5113

**Issue:** The ICD9 Diagnosis codes should include the E (cause codes); we previously thought these should be excluded from the diagnosis codes. (The cause codes still remain limited to the E codes)

**Resolution:**

USER: The E cause codes have been included in the diagnosis codes, the cause codes are limited to the E codes

### Claim Maintenance - Claimant: Medical

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5385

**Issue:** Please add fields for Examiner Status, By, Date, Note and Manager Status, By, Date, Note. Status options should be New, Pending, Issues and Approved; default and existing data should be New for both examiner and manager. Date and By should updated (to logged user and system date) when the status or Note are changed; existing data should be set to claimsa and the date of the version update. Same changes need to be made to Claimant in Notice.

**Resolution:**

USER: Screen has been redesigned.

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**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5450

**Issue:** Please add a field for Export. To show the status of the Next Export. The statuses will be as follows: -2 Error, -1 Done, 0 Pending, 1 Add, 2 Update, 3 Del/Add. New field should be initialized to 1 for existing "Beneficiaries" and 0 for all other existing claimant and to 0 for new claimants going forward. MSP Claim Export should set this to -1 for all. MSP Claim Response should set this to -2 if errors are reported. MSP Candidate Response Import should set it to 1 if a HICN is provided. User changes to Key data should change this to 3 if the current value is -2, -1 or 2. User changes to Update data should change this to 2 if the current value is <0.

**Resolution:**

USER: The Export Status field has been added and displays the status

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### Claim Maintenance - Claimant: Medical

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5452  
**Issue:** Please remove (hide) the MSP Start and End dates. They will not be needed.  
**Resolution:**  
USER: Removed

### Claim Maintenance - Claimant: Medical & Product Liability Detail

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5022  
**Issue:** HICN varchar(16), Desc of Injury (same as in workcomp tab), ICD9 codes (need to support upto 5 codes), Part of Body codes (need to support upto 5 codes), Product liability indicator (tristate Y/N/?), Product Generic & Brand names, Mfg and Harm caused (see case 4932).  
**Resolution:**  
USER: Screen has been redesigned.

### Claim Maintenance - Claimant: Medical Detail

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 5079  
**Issue:** Then Cause dropdown needs to be from ICD9"E Code" describing the alleged cause of injury/illness (E800-E999).  
**Resolution:**  
USER: See MSP User Manual. The Dropdown has been changed to a Lookup Field where the ICD9 Codes can be accessed.

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 5083  
**Issue:** The 'Section 111 Status' needs to be relabeled 'MSP Status' and the drop down needs to be populated with the following statuses: Exempt, Nominee, Candidate, Beneficiary, Reported, Terminated, Error.  
**Resolution:**  
USER: See MSP User Manual.

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 5084  
**Issue:** Populate 'MSP Status' for all existing claimants using the following rules. Rules are hierarchical and should be applied in the order stated.  
1. Claimants not linked to a suffix will be set to Except.  
2. Claimants associated to only Exempt coverages (through suffix) will be set to Except.  
3. Claimants on claims closed prior to installation will be set to Except.  
4. Remaining Claimants will be set to Nominee  
5. Nominees will be evaluated for completeness and set to Candidate as appropriate.  
Completeness is determined by: Must have HICN or SSN and 3 out of 4 following (First initial of the first name, First 6 characters of the last name, Date of birth, Gender)  
**Resolution:**  
USER: Data will be initialized per the above rules.

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### Claim Maintenance - Claimant: Medical Detail

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 5094

**Issue:** MSP DOI - Change Label to CMS DOI  
Nature - Remove dropdown this screen. Data is no longer required for MSP (continues to be required for WC); it should be removed from the database to avoid future confusion.  
Part of Body - Remove feature this screen. Data is no longer required for MSP (continues to be required for WC); it should be removed from the database to avoid future confusion.  
Cause - Remove this dropdown. Specification has changed WCIO to ICD9 coding. With 3,000 values we will need something more sophisticated for lookup to be covered in a separate task. Data should be erased but field can remain for use by the new feature.  
No Fault Limit - Add a dollar amount field to capture this.  
No Fault Exhaust - Add a date field to capture this.

**Resolution:**

USER: See MSP User Manual.

---

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 5096

**Issue:** Please add the Claimants SSN to this screen as view only.

**Resolution:**

USER: See MSP User Manual.

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**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5035

**Issue:** MSP DOI - Change Label to CMS DOI  
Nature - Remove dropdown this screen. Data is no longer required for MSP (continues to be required for WC); it should be removed from the database to avoid future confusion.  
Part of Body - Remove feature this screen. Data is no longer required for MSP (continues to be required for WC); it should be removed from the database to avoid future confusion.  
Cause - Remove this dropdown. Specification has changed WCIO to ICD9 coding. With 3,000 values we will need something more sophisticated for lookup to be covered in a separate task. Data should be erased but field can remain for use by the new feature.  
No Fault Limit - Add a dollar amount field to capture this.  
No Fault Exhaust - Add a date field to capture this.

**Resolution:**

USER: Screen has been redesigned.

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**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5116

**Issue:** Please add a Self-Insured Indicator. Valid values are Yes/No. Default from the Fund MSP Self-Insured Indicator.

**Resolution:**

USER: Screen has been redesigned.

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### Claim Maintenance - Claimant: MSP

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5382

**Issue:** Product Liability and Workers Comp were previously thought to be mutually exclusive; but that was not correct. Please enable the Product Liability button even for W/C claims.

**Resolution:**

USER: Screen has been redesigned.

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### Claim Maintenance - Claimant: MSP Additional Claimants

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5039

**Issue:** Need to support MSP concept of additional claimants where the Injured party is deceased and there are Survivor Beneficiaries. These survivors can be entered as claimants as needed. Each deceased claimant could have a reference to up to 4 survivors; each reference would have a relationship type E = Estate F = Family O = Other. Associations need to be many to many as in the case where two parents are on the claim and are deceased, their multiple children would be survivors to each parent.

**Resolution:**

USER: Screen has been redesigned.

### Claim Maintenance - Claimant: Ongoing Responsibility for Medicals

**Release:** 4.14b      **Task Type:** Task      **External Ref:**      **Case No:** 5138

**Issue:** Fields were mislabeled using incorrect acronym OMR; it should be ORM. Need to make sure that any of the field labeled as OMR are changed in ORM

**Resolution:**

USER: Fields were mislabeled using incorrect acronym OMR; they should be ORM

### Claim Maintenance - Home Metrics:

**Release:** 4.14b      **Task Type:** Bug      **External Ref:**      **Case No:** 5133

**Issue:** For the Recently Assigned Claims metric it looks like it is only reporting claims that have had the examiner reassigned, it is ignoring newly posted claims from Loss.

**Resolution:**

USER: The Recently Assigned Metric is now reporting all claims that have been reassigned or posted from Notice

**Release:** 4.14d      **Task Type:** Task      **External Ref:**      **Case No:** 5359

**Issue:** For the No Recent User Notes Metric, new claims were imported through UDS and When they were assigned to the user, they appeared in the No Recent User Notes list. The user had only had the claim for a couple of days and the parameter for this metric is 60 days. It may have been going off the historic notes date. The claim needs to have been open for at least the time set by the parameter for it to show up in the metric

**Resolution:**

USER: No Recent User Notes Metric has been modified to exclude claims that have been open less the the 'recent' period.

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4950

**Issue:** We have the ability to configure many metrics at the claim type level. Please add the ability to turn off or filter out metrics at the claim type level. For instance No OSL might be an issue for many claim types but of no consequence for EMB claims; we would turn it off for EMB only.

**Resolution:**

USER: Screen has been redesigned.

### Claim Maintenance - Home Metrics: Closing Ratio

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4951

**Issue:** Please add Closing Ratio to Production Metrics. Ratio is (closed+assigned from)/(new+RO+assign to)

**Resolution:**

USER: New metric added

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### Claim Maintenance - Home Metrics: MSP Queue

**Release:** 4.14b      **Task Type:** Enhance      **External Ref:**      **Case No:** 5101

**Issue:** Please add a MSP queue to the Workload Metrics. This should include Claimants on claims assigned to the user where the Claimant's MSP status is anything other than Exempt. First tier should be counts by MSP Status. Second Tier should be a list of Claimants; include the same first six columns as the Open Claim List and add the MSP status. Dblclk on a row should go to Claim Maintenance preferably to the Claimant tab for the appropriate claimant.

**Resolution:**

USER: A MSP Queue has been added to workload metrics showing all claimants (excluding Exempt) assigned to the user. The first tier shows the number of each Claimant status. The second tier shows the list of Claimants and includes their MSP status.

### Claim Maintenance - Home: Recent Claims

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5390

**Issue:** Please add a column to show when the user last accessed the claim and have that be the default sort in the grid, most recent first.

**Resolution:**

USER: New sort column added

### Claim Maintenance - Home: Related Claims

**Release:** 4.14c      **Task Type:** Enhance      **External Ref:**      **Case No:** 5272

**Issue:** Please create a related claim feature. Queue will show claims related to the claim selected in the claim tab; based on related claim groups. Related claim groups well initially create by Lightspeed so no need yet for group maintenance. Queue could be similar to the Open Claim Queue. An indicator should be added to the claim tab to alert the user when there are related claims.

**Resolution:**

USER: Now supports related claims; however currently requires Lightspeed to build the relationships.

### Claim Maintenance - Policy:

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 4987

**Issue:** Remove the fields in the bottommost portion of the Policy tab and add an Aggregate button, that when clicked will populate this lower section with the fields except for the Policy Ref No field (this has already been moved to a different area of the screen)

**Resolution:**

USER: Screen has been redesigned.

### Claim Maintenance - Policy: Entity Type

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5117

**Issue:** Please add an Entity Type dropdown to indicate if the Insured is an 'Individual' or 'Organization'. Backfill existing data; if first name field has been populated then default to 'Individual' otherwise set to 'Organization'.

**Resolution:**

USER: Screen has been redesigned.

### Claim Maintenance - Policy: MSP Fields

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4930

**Issue:** Please add the following to support the MSP enhancement: Policyholder Type. Valid values: I = Individual, O = Other than Individual (e.g. Business, corporation, organization, company, etc.)

**Resolution:**

USER: Screen has been redesigned.



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### Claim Maintenance - Policy: Screen Changes

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4962

**Issue:** Insured contact info - Move to a popup to be displayed from a {Contact} button near the bottom of the screen.  
Loss Location - Move to the Claim tab to be displayed from a {Location} button.

**Resolution:**

USER: Screen has been redesigned.

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**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4965

**Issue:** Please add a coverage grid to show Coverage, Limit, Limit Description, deductible based on info in Suffix. This grid is informational only no entry or modification will be allowed in this grid.

**Resolution:**

USER: Screen has been redesigned.

### Claim Maintenance - Status:

**Release:** 4.14d      **Task Type:** Task      **External Ref:**      **Case No:** 5311

**Issue:** When trying to use the status templates it is not possible to do if there is an existing status. If that status is deleted, the template can be used. If there is a space or carriage return still in the field the template option will not work. We need to disregard any spaces or carriage returns when allowing the user to add a status template

**Resolution:**

USER: If there is only a Space or Carriage Return in the Status field it is still possible to add a template to the status

### Claim Maintenance - Status: Screen Changes

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4970

**Issue:** Add a suffix grid to the top of the screen to replace the record navigator.  
We need to add a single claim level status field at the top of the screen, this claim level status should also be available on the Claim, Auto and Workers Comp tabs; editable from any tab. Add a {Claim Status} Button near the bottom of the screen; when selected the currently selected status text should replace the claim level status field. Must have cancel feature.

**Resolution:**

USER: Screen has been redesigned.

### Claim Maintenance - Suffix:

**Release:** 4.14b      **Task Type:** Task      **External Ref:**      **Case No:** 5110

**Issue:** When the Claimants Current MSP Status is Exempt and a suffix is reopened that is Reportable or Conditional then set the Claimant MSP status to Nominee

**Resolution:**

USER: When a suffix is reopened that is reportable the Claimant MSP is set to Nominee

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**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5110

**Issue:** If the Current Claimant MSP status is Nominee , Candidate, Beneficiary, Reported, Terminated or Error and the new suffix is Reportable or Conditional then alert the examiner of the additional coverage

**Resolution:**

USER: Alert added for MSP

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### Claim Maintenance - Suffix:

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5112  
**Issue:** If the Current Claimant MSP status is Nominee , Candidate, Beneficiary, Reported, Terminated or Error and the new suffix is Reportable or Conditional then alert the examiner of the reopened coverage  
**Resolution:**  
USER: Alert added

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**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5363  
**Issue:** Able to see the recovery screen by clicking on the recovery button, clicking on the Status button displays the status screen, clicking back on the Recovery button does not return the user to the Recovery screen  
**Resolution:**  
USER: Screen has been redesigned.

### Claim Maintenance - Suffix: Error/No Reporting Close Reason

**Release:** 4.14b      **Task Type:** Enhance      **External Ref:**      **Case No:** 5127  
**Issue:** Please add the following warning if the user closes with reason "Error/No Reporting" while there is a non-zero LP, EP or Recovery. "WARNING: THIS CAN CAUSE SEVERE RECONCILIATION ISSUES if financials are not zeroed out for the Claim/Suffix prior to closing".  
**Resolution:**  
USER: The Close reason of Error/No Reporting is for special use. When the user closes a suffix and uses the Close reason of Error/No Reporting, while there is a no zero LP or EP or Recovery they get the following warning "WARNING: THIS CAN CAUSE SEVERE RECONCILIATION ISSUES if financial are not zeroed out for the Claim/Suffix prior to closing".

### Claim Maintenance - Suffix: Recovery Detail

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5045  
**Issue:** Move the Offset Amount from the Claim-Misc Detail; and the Future Rec from the Suffix screen to the Recovery Detail area. Add a 'Mode' radio button option group with options for 'Recovery Received' (default), 'Potential Future Recovery' and 'Cap Excess Offset'. In Recovery Received mode the Offset Amount and Future Rec will be disabled; in Potential Future Recovery mode ONLY Future Rec will be Enabled and in Cap Excess Offset mode ONLY Offset Amount will be Enabled.  
**Resolution:**  
USER: Screen has been redesigned.

### Claim Maintenance - Suffix: Screen Changes

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4966  
**Issue:** Move the Recovery Received fields; Recovery Received, type, checkno and Payee to a {Recovery} button to be located near the bottom of the screen. Add a a {Payment} button to be located near the bottom of the screen to be indential functionality of selecting Payment from the dropdown toolbar.  
**Resolution:**  
USER: Screen has been redesigned.

### Claim Maintenance - Suffix: Status Button

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4960  
**Issue:** Make status label a button. Remove the Close and Reopen Reasons; replace with a grid on the Status Button Pop-up that lists Suffix level Open, Close and Reopen transactions for the suffix, including the Close and Reopen Reasons. Grid should have column sort and filter but should default to descending date order. Lower portion should have a generic reason list with a label button to change the status; button title would be Close if the suffix current status is Open/Reopen, or Reopen if the current Status is Closed, the reason list would be filtered based on the action being initiated.  
**Resolution:**  
USER: Screen has been redesigned.

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### Claim Maintenance - Transaction: Check Image

**Release:** 4.14d      **Task Type:** Enhance      **External Ref:**      **Case No:** 5322

**Issue:** Display check copy in ImageRight from the Transaction Detail for a payment transaction.

**Resolution:**

USER: Able to view checks from the transaction detail screen by clicking on the Image button

### Claim Maintenance - Workers Comp:

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5065

**Issue:** Make an injury button that creates a free form screen at the bottom of the tab. Move ICD9, Description of Injury, Surgery Dates

**Resolution:**

USER: Screen has been redesigned.

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5066

**Issue:** Add a Subro Button that will display a free form screen at the bottom of the tab. Move the Subro Status, Adverse Party, Carrier/Civil No, Comment to this screen

**Resolution:**

USER: Screen has been redesigned.

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5067

**Issue:** Move the Class Code field to the Indemnity screen

**Resolution:**

USER: Screen has been redesigned.

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5204

**Issue:** Need to add a data fix that will populate the Employer field on the Workers Comp tab with the Policy Insured Full Name information if the Employer field is blank.

**Resolution:**

USER: Screen has been redesigned.

### Claim Maintenance - Workers Comp: 5.00 Redesign

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5040

**Issue:** New system design for v5.x; redo the screen similar to the work done on Claimant where there is only one page but the lower portion is changable through buttons. Move the payment summary grid from Page 2 to a Detail generated from a 'Pay Summ' Button. Move the Coding info in the WCIO Codes section to a Detail generated from a 'WCIO' Button. Move the Synopsis to Detail generated from a 'Synopsis' Button. Add a Medical Button with the exact funtionaility as the Medical button on the claimant tab.

**Resolution:**

USER: Screen has been redesigned.

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### Claim Maintenance - Workers Comp: ICD9 Diag Codes

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 5071

**Issue:** For WorkComp ELCMS has long supported a single ICD9 Diagnosis code. MSP has introduced the concept to non-WorkComp claimants along with the concept of multiple ICD9 Diagnosis codes per injury. We will move that single ICD9 code from WorkComp to Claimant. Existing WorkComp ICD9 values should be moved to the first ICD9 on the Claimant. UDS imports should now populate the first ICD9 on the Claimant. UDS Exports should use the first ICD9 on the Claimant.

**Resolution:**

USER: See MSP User Manual.

### Claim Maintenance - Workers Comp: Screen Changes

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4969

**Issue:** Please add an Indemnity Button near the bottom of the page; move Hire dt, Return dt, Benefit, AWW, PDPct to a popup available form this button.  
Please add an AutoPay Button near the bottom of the page; this should launch the AutoPay tab of AutoPay for the selected claim.

**Resolution:**

USER: Screen has been redesigned.

### Claim Maintenance:

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5381

**Issue:** When the user is on a particular screen within the different tabs, they should be returned to the same screen when they find a new claim.

**Resolution:**

USER: Screen has been redesigned.

### Claim Maintenance: Description Templates

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4964

**Issue:** Provide a means for customers to establish templates (default entries) for the various claim types. A given template may apply to one or many types so there needs to be a cross-reference; for a given claim type the available templates may be many or none. We will need a maintenance screen under business defined for each customer to maintain the templates. A {Tmpl} button under the Description label when clicked -- if there is no template for the selected type there will be no change, if there is only one template for the type it should automatically insert the template in front of any pre-existing text, if there are multiple templates for that type there should be a pop-up for them to select the template then the template inserts in front of any pre-existing text.

**Resolution:**

USER: Supports templates

### Claim Maintenance: POC Detail

**Release:** 4.14c      **Task Type:** Enhance      **External Ref:**      **Case No:** 5265

**Issue:** Please add a "POC" button to the Claim Tab Which will display a POC Detail screen. This button is only for the Hawaii Receiver systems but will initially only be available for HUI, make it determined by special rule. Display should contain POC (varchar20), Sent (smdatetime), Received (smdatetime), Claimed (Money), C/U (flag), Undelivered (flag). These values will come from a new lcPOC table, that links on lclaim.

**Resolution:**

USER: Button added for Receivers

### HI HIG,HID,HUI,HIH ONLY

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5268

**Issue:** Please add a "POC" button to the Claim Tab Which will display a POC Detail screen. This button is only for the Hawaii Receiver systems but will initially only be available for HUI, make it determined by special rule. Display should be a grid containing POC (varchar20), Sent (smdatetime), Received (smdatetime), Claimed (Money), C/U (flag), Undelivered (flag). These values will come from a new lcPOC table, that links on lclaim.

**Resolution:**

USER: Now supports POC info

### HI HIG,HID,HIH,HUI ONLY

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### Claim Maintenance: POC Detail

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5271

**Issue:** Please add a "POC" button to the Claim Tab Which will display a POC Detail screen. This button is only for the Hawaii Receiver systems but will initially only be available for HUI, make it determined by special rule. Display should be a grid containing POC (varchar20), Sent (smdatetime), Received (smdatetime), Claimed (Money), C/U (flag), Undelivered (flag), Remarks (large varchar or text). These values will come from a new lcPOC table, that links on lclaim.

**Resolution:**

USER: Now supports POC detail

### HI HIG,HID,HIH,HUI ONLY

### Claim System: 5.00 Foundation

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4925

**Issue:** New system design for v5.x

**Resolution:**

USER: Screen has been redesigned.

### Claim System: Build Numbering

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5246

**Issue:** Please implement a Build numbering feature and display the build number in the help about.

**Resolution:**

USER: Build number now in Help About

### Claim System: ICON

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5367

**Issue:** New icon for v5.x.

**Resolution:**

USER: New ICON for desktop

### Claim System: Main Toolbar

**Release:** 5.00      **Task Type:** Enhance      **External Ref:** 2009      **Case No:** 5054

**Issue:** Having the Update and Cancel buttons side by side is problematic for new users. Please separate these buy moving the cancel button away from update and placing it next to the close button.

**Resolution:**

USER: Toolbar has been redesigned.

### Claim System: MSP ICD9 Codes

**Release:** 4.14d      **Task Type:** Enhance      **External Ref:**      **Case No:** 5343

**Issue:** There are two sets of rule for which codes are valid for MSP. One set for Cause (beyond the V,E codes) and another one for Diagnosis. Please add two status columns to the table so we can set these for each type. For now populate them based on the current rules you already know, and change the screens to work off of the new statuses.

**Resolution:**

USER: Rules fo which codes are valid codes for Cause and Diagnosis have been applied.

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### Claim System: Recovery Reporting

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5368

**Issue:** In the Claim Search, Claim Summary, Bulk Mailing, and Suffix Summary flex reports, the Recovery Indicator is displayed as a checkbox. In Claim 5, this is only available to the user through the Recovery button on the Suffix tab as Potential Future Recovery. Recovery is a Suffix Level item, it is not appropriate for the Claim Search, Claim Summary, and Bulk Mailing flex reports; please remove it from these flex reports. It should remain for the Suffix Summary flex report where the user should have multi-select to pick any combination of types.

**Resolution:**

USER: Recovery flagging and reporting now closer matches UDS.

### Claim System: Reopen Status

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4963

**Issue:** Please create a reopen status for claim and suffix. Many reports will need to be adjusted for this.

**Resolution:**

USER: Reopened is now a claim status

### Collections:

**Release:** 4.14b      **Task Type:** Test Bug      **External Ref:**      **Case No:** 5123

**Issue:** In the Debtor Detail screen the Drivers license state is not being filtered

**Resolution:**

USER: The drivers license state is being filtered based on the country on the Debtor screen.

### Collections: Claim # 0712410

**Release:** 4.14c      **Task Type:** Task      **External Ref:** 8251      **Case No:** 5162

**Issue:** Examiner pushed file into collection and did not complete the auto tab causing the file to come over with no Debtor selected on the collection side.

**Resolution:**

USER: Roll Back fix, officially a v4.14c componet has already been patched into NJPLIGA to fix the problem.

### NJPLIGA ONLY

### Company Financial Maintenance - History:

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5335

**Issue:** Please add a new first tab "History". Screen should have find fields at the top of the screen for Fund and Company. A grid in the middle of the screen will show a history of exports for the specified Fund and Company. Buttons in the bottom of the screen will offer "View", "Prepare", "Other Period", "Revise". See Q:\20\_Project Claim v5.x\10\_Documents\Functional-Technical Documentation\Company Finan Maint History tab.vsd for logic.

**Resolution:**

USER: Screen has been redesigned.

### Company Financial Maintenance - Revenue:

**Release:** 4.14b      **Task Type:** Task      **External Ref:**      **Case No:** 5144

**Issue:** The Special Deposit and Early Access Distributions fields only allow values up to 999,999.00. They need to be expanded to allow up to 999,999,999.00

**Resolution:**

USER: Fields have been expanded and the edit mask has been changed to allow the larger amount.

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### Coverage Maintenance:

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 4944

**Issue:** Please add a 'MSP' flag to indicate coverages that could be reportable under Medicare Second Payer. The MSP flag will need to be a MSP Type with values for "Reportable", "Exempt" and "Conditional". See Steve for a list of the coverages and their types. Also please add a ASL field for the Annual Statement Line.

**Resolution:**

USER: Drop down field has been added that shows the MSP type value for the coverage, either Reportable, Exempt or Conditional.

---

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 5029

**Issue:** Please add column filters to the grid in coverage maintenance. Please make the Print button produce the coverage report rather than a grid dump.

**Resolution:**

USER: Done

---

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 5036

**Issue:** Add an MSP Insurance Plan Type. Valid values: D = No-Fault E = Workers' Compensation L = Liability. See Steve for assignment of values.

**Resolution:**

USER: Done

---

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5031

**Issue:** Please ensure that any and all changes to the coverage table are logged including the before and after values. Make sure this includes the new fields.

**Resolution:**

USER: Changes will now be logged

### Coverage Maintenance: Annual Statement Line

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 5028

**Issue:** Please populate the new ASL field

**Resolution:**

USER: Done

### Coverage Maintenance: Ongoing Medical Responsibility

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 5027

**Issue:** Please add an OMR field to the coverage table to flag coverages subject to Ongoing Medical Responsibility. Values for this field should represent 'OMR' or 'N/A'

**Resolution:**

USER: Done

### Coverage:

**Release:** 4.14d      **Task Type:** Task      **External Ref:**      **Case No:** 5361

**Issue:** Can you please create appropriate script to add a StdLOB '1009' for 'Liquidation' and add the appropriate 8 coverages

**Resolution:**

USER: New coverages have been added for non-class 2 claims

HUI ONLY

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### Excel Export: exportxl\_spu\_missingmspdata2

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 5077

**Issue:** Please create an Excel Export that takes a general parameter of a UDS Coverage Code. If no parameter it should report for all coverages with MSP flag "Reportable" or "Conditional". It should list any OPEN suffix with the specified coverage where the Claimant's MSP data is missing or incomplete. MSP data is: Claimant SSN, DOB, Gender. Please include these fields in the list: Company, Adjuster, Claim No., Claim Status, Coverage Code, Claimant number, Claimant last name, Claimant first name, Claimant full name, Claimant SSN, Claimant DOB, Claimant Gender

**Resolution:**

USER: This can be used to identify claimants that require backfill/clean-up work to prepare for MSP reporting. Later versions will include workflows, queues and alerts to identify these issues.

### Excel Export: exportxl\_spu\_MSP

**Release:** 4.14d      **Task Type:** Enhance      **External Ref:**      **Case No:** 5337

**Issue:** Report of all claimants on claims that are open or have been open since 1/1/09 and on suffixes with coverage MSP Reportable or Conditional.

**Resolution:**

USER: New Excel Export exportxl\_spu\_MSP is available. It takes the optional General parameter of IGA, date parameters are not used for this export.

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5386

**Issue:** Please add the suffix level LP amount to the results. Also please add the new examiner and manager status, date and note columns. Please also add the claim last activity date to the results

**Resolution:**

USER: Export now includes suffix level LP amount

### Excel Export: Screen Changes

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4974

**Issue:** Need to populate the Export Name field. Modify grid to show Export Name, Last Used date and help; grid should default to filter out disabled but have option to include. Make date and date range criteria relative vs. specific, ie 'Prior Quarter' or 'Incept thru Prior Month'. Add Memorized Excel Exports similar to Memorized Reports in Flex reports but criteria will be far simpler. Need to determine if exports honor data access security and if not consider adding sperate security for each export item.

**Resolution:**

USER: Screen has been redesigned.

### Imaging:

**Release:** 4.14d      **Task Type:** Task      **External Ref:**      **Case No:** 5317

**Issue:** We need to be able to validate that the current claim has a file available in ImageRight, if it does not we need a message for the user that indicates the the IR File is not found. Currently if there is no file in ImageRight, clicking the Image button does nothing.

**Resolution:**

USER: If the claim does not appear in ImageRight, a message pops up indication that the Claim is not yet processed in ImageRight.

### FIGA,HI,HIG,HID,HIGA,HIH,HUI,NIGA ONLY

**Release:** 4.14d      **Task Type:** Task      **External Ref:**      **Case No:** 5358

**Issue:** When the user clicks on the Save button on the Image Index screen, instead of indexing the file we need to do the following  
Popup a screen with the following caption - 'Feature Under Development'  
Followed by - 'The document would be indexed to'  
Display the following information on the popup screen  
Location, Drawer, File, Folder, Subfolder, Document Type, Document Comment, Date

**Resolution:**

USER: Temporary solution while Lightspeed works with ImageRight to develop a real indexing solution.

### HI,HIG,HID,HIGA,HIH,HUI ONLY



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### Import/Export - 1099 Export:

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4937

**Issue:** FIGA needs to be able to export the data to be imported into an third party 1099 system where additional non-Lightspeed payments need to be incorporated. In this case the \$600.00 minimum should not be applied when exporting from Lightspeed. Please add a 'No Minimum' option which would not filter out the vendors with < \$600.00.

**Resolution:**

USER: No Minimum option added

### Import/Export - 1099 Export: IRS Changes

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5421

**Issue:** IRS added additional amount fields to the BC&K records. For our customers these amounts will always be zero but we need to change our output from blanks to zeros for these fields.  
B Record - Amount F (pos 223-234) and Amount G (pos 235-246) was Blanks for future use; now needs to be zeros for amounts F&G which do not apply to 1099MISC.  
C Record - Amt F Total (pos 268-285) and Amt G Total (pos 286-303) was Blanks for future use; now needs to be zeros for totals F&G  
K Record - Amt F Total (pos 268-285) and Amt G Total (pos 286-303) was Blanks for future use; now needs to be zeros for totals F&G

**Resolution:**

USER: Modified to meet specifications

### Import/Export - MSP Candidate Export:

**Release:** 4.14b      **Task Type:** Enhance      **External Ref:**      **Case No:** 5085

**Issue:** Export of ALL claimants with MSP status Candidate. This export will be done monthly by the user. Only criteria will be the fund (default if only one) and save file location. See CMS documentation on Section 111 Query Input File for file specs.

**Resolution:**

USER: Export has been added to 4.14b, called MSP Entitlement Query. This will allow the user to export all the claimant with an MSP status of Candidate

**Release:** 4.14d      **Task Type:** Enhance      **External Ref:**      **Case No:** 5341

**Issue:** Correct Name in the export dropdown. Please add a "Test File" option that limits the file to 100 rows.

**Resolution:**

USER: Test file option now limits the output to 100 rows.

### Import/Export - MSP Candidate Response Import:

**Release:** 4.14b      **Task Type:** Enhance      **External Ref:**      **Case No:** 5086

**Issue:** Imports a MSP Query Response file that is one record per claimant, for the claimants most recently sent. 99.99 percent of the claimants in this response file will link to Claimant by SSN the remainder should link by HICN. If disposition code is 01 then link to the claimant, update HICN, DOB and/or Sex from the imported data if it differs; also set the claimant's MSP status to Beneficiary. If disposition code is anything other than 01 do nothing for that record.

**Resolution:**

USER: Import has been added for the MSP Query Response file.

### Import/Export - MSP Claim Export:

**Release:** 4.14b      **Task Type:** Enhance      **External Ref:**      **Case No:** 5087

**Issue:** Add

**Resolution:**

USER: MSP Claim Export has been added to the Import/Export Module

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### Import/Export - MSP Claim Export:

**Release:** 4.14b      **Task Type:** Task      **External Ref:**      **Case No:** 5142

**Issue:** In the case of NJ they want to do their export based on RRE where 4 fund will have one number and the TPA will have another. Need to change the criteria screen to allow choosing the RRE value

**Resolution:**

**USER:** Criteria screen has been changed to allow the selection of the RRE. For most customers they will only have one RRE so it will be defaulted.

### Import/Export - MSP Claim Response Import:

**Release:** 4.14b      **Task Type:** Enhance      **External Ref:**      **Case No:** 5088

**Issue:** Add

**Resolution:**

**USER:** MSP Claim Response Import has been added to the claim system

### Import/Export - UDS V02 Financial Export:

**Release:** 4.14a      **Task Type:** Task      **External Ref:**      **Case No:** 5100

**Issue:** Reconciliation issues

**Resolution:**

**USER:** Several bug have been identified and corrected.

**Release:** 4.14c      **Task Type:** Bug      **External Ref:**      **Case No:** 5278

**Issue:** Recoveries need to be reported a negatives.

**Resolution:**

**USER:** Fixed

### Import/Export - UDS V02.1 UEP Import:

**Release:** 4.14a      **Task Type:** Test Bug      **External Ref:**      **Case No:** 5044

**Issue:** If a Premium Finance Company is present in the import file it requires a Tax ID number. If the PFC does not already exist in the system it will be created as a pending vendor, this needs to be displayed as an exception in the exception report in Import.

**Resolution:**

**USER:** Fixed

### Letters:

**Release:** 5.00      **Task Type:** Project      **External Ref:**      **Case No:** 4089

**Issue:** Letters were reviewed and they would like to make them more dynamic and customizable. One suggestion was to have the ability to resave as a new template. They would like to have full Word functionality so they can modify the template as necessary. We discussed CFP wanting to insert their letterhead in a .dot which will be tested at Lightspeed offices and then CFP will be trained on how to do this.

**Resolution:**

**USER:** Feature added

### Loss Notice - Auto:

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5011

**Issue:** Auto tab will be available for claims with claim type AUTO. Grid and detail forms for adding/editing vehicles.

**Resolution:**

**USER:** Screens have been redesigned.

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### Loss Notice - Auto: 5.00 Redesign

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5043

**Issue:** New system design for v5.x; redo the screen similar to the work done on Claimant where there is only one page but the lower portion is changable through buttons. Move the Synopsis to Detail generated from a 'Synopsis' Button. Add a Description button with same functionality as the one on the Claim tab. Add a Driver button that will detail the Driver info for the vehicle selected in the grid, Add an Owner button that will detail the Owner info for the vehicle selected in the grid. Vehicle info will be available from either the Driver or Owner details.

**Resolution:**

USER: Screens have been redesigned.

### Loss Notice - Claim:

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5007

**Issue:** The old Loss and Claim tabs will be combined into the new first tab "Claim". New Synopsis feature will be added. All 4 Claim level UDFs will be supported. Interchangeable detail area wil work from buttons for: Synopsis, Description, Location, Suffix, Misc and File Location.

**Resolution:**

USER: Screens have been redesigned.

### Loss Notice - Claimant:

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5009

**Issue:** All 4 Claimant level UDFs will be supported. Grid will show all claimants. Interchangeable detail area will work from buttons for: Claimant, Contact Attorney, Litigation, Medical and Product Liability.

**Resolution:**

USER: Screens have been redesigned.

### Loss Notice - Claimant: Entity Type

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5119

**Issue:** Please add an Entity Type dropdown to indicate if the Claimant is an 'Individual' or 'Organization'. Backfill existing data; if first name field has been populated then default to 'Individual' otherwise set to 'Organization'.

**Resolution:**

USER: Type added for improved MSP reporting

### Loss Notice - Loss: Calendar

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4947

**Issue:** Please add the calendar object to the report date in loss notice so we can review how it works.

**Resolution:**

USER: Calendar now available for selecting dates

### Loss Notice - Loss: POC Detail

**Release:** 4.14c      **Task Type:** Enhance      **External Ref:**      **Case No:** 5267

**Issue:** Please add a "POC" button to the Loss Tab Which will display a POC Detail screen. This button is only for the Hawaii Receiver systems but will initially only be availble for HUI, make it determined by special rule. Display should contain POC (varchar20), Sent (smdatetime), Received (smdatetime), Claimed (Money), C/U (flag), Undelivered (flag). These values will come from a new lcPOC table, that links on lclaim. Needs to post to claim on Post.

**Resolution:**

USER: POC button has been added

HI HIG,HID,HIH,HUI ONLY

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### Loss Notice - Loss: POC Detail

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5266

**Issue:** Please add a "POC" button to the Loss Tab Which will display a POC Detail screen. This button is only for the Hawaii Receiver systems but will initially only be available for HUI, make it determined by special rule. Display should be a grid containing POC (varchar20), Sent (smdatetime), Received (smdatetime), Claimed (Money), C/U (flag), Undelivered (flag). These values will come from a new lcPOC table, that links on lclaim. Needs to post to claim on Post.

**Resolution:**

USER: POC now supported

### HI HIG,HID,HIH,HUI ONLY

### Loss Notice - Policy:

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5008

**Issue:** All 4 Policy level UDFs will be supported. Interchangeable detail area will work from buttons for: Contact and Aggregate.

**Resolution:**

USER: Screens have been redesigned.

### Loss Notice - Policy: Entity Type

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5118

**Issue:** Please add an Entity Type dropdown to indicate if the Insured is an 'Individual' or 'Organization'. Backfill existing data; if first name field has been populated then default to 'Individual' otherwise set to 'Organization'.

**Resolution:**

USER: Type added for improved MSP reporting

### Loss Notice - Suffix:

**Release:** 4.14b      **Task Type:** Bug      **External Ref:**      **Case No:** 5211

**Issue:** There is an ability to add the gender on the suffix tab of Loss Notice, however after posting the Loss, the gender information does not post into claim.

**Resolution:**

USER: Posting Issue with the Gender field has been resolved

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5010

**Issue:** Old notice suffix tab will be split into separate tabs for claimants and suffixes. All 4 Suffix level UDFs will be supported. Grid will show all suffixes.

**Resolution:**

USER: Screens have been redesigned.

### Loss Notice - WorkC:

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5012

**Issue:** Autopay button will be available for claims with claim type WorkC. WCIO fields. Add flag for Autopay flag coming from UDS A records.

**Resolution:**

USER: Screens have been redesigned.

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5203

**Issue:** Add Employer field to WC tab in Loss Notice. This should populate from the Insured Name in Policy if it does not already have an entry.

**Resolution:**

USER: Screens have been redesigned.

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### Loss Notice - WorkC: 5.00 Redesign

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5041

**Issue:** New system design for v5.x; redo the screen similar to the work done on Claimant where there is only one page but the lower portion is changable through buttons. Move the payment summary grid from Page 2 to a Detail generated from a 'Pay Summ' Button. Move the Coding info in the WCIO Codes section to a Detail generated from a 'WCIO' Button. Move the Synopsis to Detail generated from a 'Synopsis' Button. Add a Medical Button with the exact funtionaility as the Medical button on the claimant tab.

**Resolution:**

USER: Screens have been redesigned.

### Loss Notice:

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5199

**Issue:** Widen the drop down fields on the Claim and Policy tabs for the Examiner, Manager and Std LOB fields

**Resolution:**

USER: Screens have been redesigned.

### Loss Notice: Bulk Update

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4976

**Issue:** Please create the ability to bulk update a group of Loss Notices with the information needed to quick post. The feature should start with a Search style criteria to select potential Loss Notices. The result grid should include sort and filter. User should then be able to designate values for: Examiner, Claim Type, File Location Date, Coverage, Reserves and default Diary dates. There should be an options to overwrite or only fill missing. There should be an additional Diary Spread option where the operator would specify a date range to spead the diaries over. This would then apportion the selected Loss Notices equally over the working days in the date range. This should consider holidays from a Business defined table.

**Resolution:**

USER: Bulk update feature added.

### Loss Notice: Quick Post

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4939

**Issue:** Some customers do the majority of the data clean-up in Loss Notice prior to posting, for them we have substantially increase the amount of processing that can be done in Loss. However other customers prefer to do minimal entry in Loss and move it into claim ASAP, for those customers we have moved to far from the original minimal entry model of Loss Notice; and need to provide a Quick Post feature. Please add a Quick Post Button to the Loss Toolbar. This button will provide a toolbar with minimum entry fields needed to get the Loss Posted. This will support quick entry of a single suffix if no suffix exsits or to edit reserves only if multilpe suffixes exist.

**Resolution:**

USER: Quick post feature added

### Loss Notice: Screen Changes

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5003

**Issue:** Screens will be re-designed to be more consistant with the corresponding screens in the new Claim Maintenance. The tabs will be Claim, Policy, Claimant, Suffix, Notes, Auto, WorkC, Contacts, Letter, Post Status; in the order stated. Auto and Workc tabs will only be visible for those claimtypes. No chages are currently planned for the Notes, Contacts, and Letters tabs; see separate cases for changes to the remaining tabs.

**Resolution:**

USER: Screens have been redesigned.

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### Options:

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4940

**Issue:** This feature will allow each individual application user to customize the system to better enable them in the performance of their assigned duties. This feature will be accessed from the file menu dropdown not the application tree. There should be a security setting so customers can control if users are able to view or edit their own options. First option will allow the user to specify their 'home page' initial screen upon login. Similar to Internet Explorer they would indicate to 'Use Current'. If user loses permissions to the selected home they should go to the Application list. Available options beyond current should be Application List, Claim-Claim, Home-Metrics or Search.

**Resolution:**

USER: New use current feature has been added

---

### Payment - Claim: Reimbursement

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5217

**Issue:** Reimbursements and refunds to loss payments in the current system must be entered as recoveries. When the money coming back is a reimbursement or refund, we don't currently support that being offset to Loss or Expense Paid. The philosophy being that if it were a recovery or an offset to LP or EP the net result to Incurred was the same. However recording a refund as a recovery causes issues Policy Limits and Large Deductibles. SEE Solution under the Case Status. See related cases 5218 & 5219

**Resolution:**

USER: Feature added

---

### Payment: OF vs Payee Name

**Release:** 5.00      **Task Type:** New      **External Ref:**      **Case No:** 5401

**Issue:** Users don't easily see that Overflow will supersede the payee name. Please hide the Payee when there is overflow.

**Resolution:**

USER: When Overflow is added to the Loss Payment the Payee fields are hidden to emphasise that it is the Overflow that will be displayed on the check and not the existing Payee Information

---

### Report - Check Register By GL Code: Reimbursements

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5218

**Issue:** Need to enhance the report to support Reimbursements (see case 5217). They should be reported in a separate section similar to voids.

**Resolution:**

USER: Report now supports reimbursements

---

### Report - Coverage:

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 5004

**Issue:** Need to add MSP, OMR and ASL columns to the report. Please make the report landscape so the StdLOB can be wider.

**Resolution:**

USER: The Coverage report has been converted to a landscape report with a wider STD LOB field. Also the MSP and ASL columns have been added to the right hand side of the report

---

**Release:** 4.14b      **Task Type:** Test Bug      **External Ref:**      **Case No:** 5143

**Issue:** The ASL column heading is right aligned, when the column itself is left aligned. Change the column heading to be left aligned.

**Resolution:**

USER: Fixed.

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### Report - Examiner Production:

**Release:** 4.14b      **Task Type:** Bug      **External Ref:**      **Case No:** 5205

**Issue:** The Examiner Production - NJPLIGA needs to have the Reassigned to and From columns added to the report, as well as the title being changed to Examiner Production - Capacity.

**Resolution:**

USER: Report has been renamed and columns have been added for reassignment

---

**Release:** 4.14b      **Task Type:** Bug      **External Ref:**      **Case No:** 5239

**Issue:** The Examiner Production - There is a bug in the Claim Reassignment calculations

**Resolution:**

USER: Report title has been changed and columns have been added.

### Reports - Flex Reports:

**Release:** 4.14b      **Task Type:** Test Bug      **External Ref:**      **Case No:** 5224

**Issue:** In the Check Register Flex Report that GL Code description is not being calculated correctly

**Resolution:**

USER: The description is being displayed correctly for the GL Code

---

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5431

**Issue:** Need to change the Claim Status option for the Flex reports. This is currently a drop down, needs to be converted to check boxes where the user can pick multiple options

**Resolution:**

USER: Done

### Reports - Flex Reports: Bulk Mailing

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4997

**Issue:** Please add to the Recipients list Plaintiff Attorneys. When selected it would include any/all Claimant attys for the selected claims.

**Resolution:**

USER: Added

### Reports - Flex Reports: Check Register

**Release:** 4.14b      **Task Type:** Enhance      **External Ref:**      **Case No:** 5124

**Issue:** Please add Policy and Insured to the output including the export

**Resolution:**

USER: Policy No and Insured Name has been added to the export from the Check Register Check Report

---

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5219

**Issue:** Need to enhance the report to support Reimbursements (see case 5217). They should be reported in a separate section similar to voids.

**Resolution:**

USER: Report now supports reimbursements

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### Reports - Flex Reports: Scheduled Reports

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 4942

**Issue:** Please add a scheduling feature for memorized reports. User will specify Filename and Save as type, location and the schedule. File name should have an option to append report date (YYYYMMDD) to the name. Location should be in UNC if possible (may be a training issue). Schedule should be specified simialar to how AutoPay is scheduled. Actual reports will be created by the LSScheduler and can be monitored in the Automation Scheduling feature.

**Resolution:**

USER: Reports can now be scheduled

### Reports:

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5430

**Issue:** Need to add a claim status to any report that has a status drop down. Need to add an Open/Reopen option that will display claims with either status

**Resolution:**

USER: Done

### Search:

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5429

**Issue:** Need to add a status to the drop down in search. Need to have an option for Open/Reopen that will find all the claims that have either status

**Resolution:**

USER: Done

### Search: Status

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5384

**Issue:** Now that we have a Reopened Status we need an option in Search Status for Open/Reopen that will return both Open and Reopen.

**Resolution:**

USER: Now supports new Reopened status

### Security - Permissions: MSP Override

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 5093

**Issue:** This will have effectively three levels below.  
None – User is not allowed to override any MSP settings.  
Level 2 – User will have limited ability to override some MSP settings.  
Level 1 – User will be able to make any override to any MSP setting.

**Resolution:**

USER: Several fields have been added to the claimant information. These fields have specific impact to the MSP reporting. See MSP User Manual.  
All users with edit rights to claim should be generally aware that these impacts exist. Users that will generally be working with Claimant information should be trained on the impacts to MSP reporting and then granted Level 2 security. Level 1 security should be limited to a very few users who will deal with extreme exceptions to general processing.

### Security - User Maint:

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5121

**Issue:** Please add First, MI and Last Name fields. Parse the fullname into these fields for existing data.

**Resolution:**

USER: Now supports name parts



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### Security - User Maint:

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5342  
**Issue:** Please have the screen open if Find mode  
**Resolution:**  
USER: Now opens in find mode

### Security \_ Permissions:

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5340  
**Issue:** Please add column sort. Have the screen sorted by Description by default. Please remove the type column.  
**Resolution:**  
USER: Screens have been redesigned.

### Security:

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5437  
**Issue:** Need to add an option to user security that will allow an administrator to clear the user preference choices such as use current  
**Resolution:**  
USER: Done

### Table - Fund Maintenance:

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 5037  
**Issue:** Add CMS Contact Info to include Name, Department, Address, Phone w/ext. Add a field for Claim Level Contact to be defined at the Fund level. Values are 'Fund Contact', 'Claim Manager', 'Claim Examiner' and 'Leave Blank'.  
**Resolution:**  
USER: See MSP User Manual.

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 5070  
**Issue:** Need to add fields to support MSP; as a result, the screen needs to be redesigned to make room. We will do a Claim 5 style screen now. Please add buttons and details for 'Mail', '1099', 'FIQ' & MSP. Each screen should have the typical contact info plus some addition specific fields. Much of the fields on the current screen will move to one of these 4 details (see Steve for spec)  
**Resolution:**  
USER: See MSP User Manual.

**Release:** 5.00      **Task Type:** Task      **External Ref:**      **Case No:** 5210  
**Issue:** Need screen cleanup for the following screens - Fund 1099, Fund FIQ, Fund Maintenance and Fund MSP  
**Resolution:**  
USER: Screens have been redesigned.

### Table - Fund Maintenance: MSP

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5115  
**Issue:** Please add a Self-Insured Indicator. Valid values are Yes/No. Default all current data to No.  
**Resolution:**  
USER: Screens have been redesigned.

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### Table - Fund Maintenance: MSP Fields

**Release:** 4.14a      **Task Type:** Enhance      **External Ref:**      **Case No:** 4928  
**Issue:** Please add the following to support the MSP enhancement: Section 111 Reporter ID a nine digit numeric code.  
**Resolution:**  
USER: See MSP User Manual.

---

### Table - Letter Maintenance: Letter Report from Print button

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5021  
**Issue:** Please turn the report to Landscape to all more of the comment field to be displayed  
**Resolution:**  
USER: Report has been redesigned.

---

### Table Maintenance: Claim Type

**Release:** 5.00      **Task Type:** Enhance      **External Ref:**      **Case No:** 5373  
**Issue:** Please add a MSP setting to Claim Type. It should be set to Disabled for EMB (NJ), all non-class 2 for (HI) all claim types for CFP/CEA; it should be set to Active for all other claim types at all customers. All claimants on all MSP Disabled Claim Types should be set to MSP-Exempt and ORM-No; this should apply to defaulting on new claims/claimants.  
**Resolution:**  
USER: Claims can be designated as MSP relevant or not at the claim type level.

---