Lightspeed Data Solutions

Release Notes

Claim v5.03 User (post v5.02)

Claim

Auto Pay - AutoPay: OFAC alerts

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6335**

Issue: Add OFAC alerts for AutoPay

Resolution:

USER: OFAC alerts have been added to the Auto Pay module

Auto Pay - Review: Print Button

Release: 5.03 **Task Type:** Bug **External Ref:** **Case No:** **6243**

Issue: Autopay window, Review tab prints grid. I should do a report similar to the Workers Comp Auto Pay Detail Report

Resolution:

USER: Print button now produces a formated report.

Billing: Print Button

Release: 5.03 **Task Type:** Bug **External Ref:** **Case No:** **6244**

Issue: Billing window prints grid. We probably do not need a print function for this screen. Please disable the button.

Resolution:

USER: Print button now produces a formated report.

Bulk Reassignment:

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6212**

Issue: Please add an "Open/Reopen" option to the status criteria for both the Examiner and Manager tabs.

Resolution:

USER: An Open/Reopen option has been added to the Status criteria on the Examiner and Manager tabs of the Bulk Reassignment module.

Claim Maintenance - Claimant: Medical

Release: 5.03 **Task Type:** Bug **External Ref:** 10765 **Case No:** **6439**

Issue: The medical tab does not open for the deceased claimant on claim # 430169. The medical tab does not open for deceased claimant (claimant 1) and the deceased survivor (claimant 2) on claim # 011577001170WC01 however it does open for the 3rd claimant who is the survivor of claimant 2.
This however does work for claim # 2-347-407182.

Resolution:

USER: The system now allows the Medical tab access for the deceased claimant but not for the deceased survivor or the survivor of claimant 2. The medical section only applies to the deceased, not the survivors

Claim Maintenance - Home Metrics:

Release: 5.03 **Task Type:** Enhance **External Ref:** 10766 **Case No:** **6326**

Issue: Ability to use the “Print button” in metrics. Should include the selected user.

Resolution:

USER: Formated reports are now available from the Print button in Metrics. Both the primary screen and for each second tier popup screen have appropriate, formated reports that include the selected user's name.

Claim Maintenance - Letter:

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6321**

Issue: Ability to select a different Examiner from the one attached to the claim for letter purposes only. Please add a 3rd By Assistant option labled Other. Selecting this option should provide a dropdown of all active users with a valid fullname. Related Author contact merged info should be for the user selected from the dropdown.

Resolution:

USER: A third option has been added to the 'by assisstant' option; it is called Other. This allows the user to select any active users through the use of a drop down field

Claim Maintenance - Status: Report from Print Button

Release: 5.03 **Task Type:** Enhance **External Ref:** 10556 **Case No:** **6438**

Issue: We recently implemented sorting and filter of the status types on the screen. Can we have the Report from the Print button honor the current sort and filter selections on the screen?

Resolution:

USER: The sorting and filtering of the data on the status tab is reflected when printing out the Claims Status report from the screen.

Claim Maintenance - Suffix: Bill Review

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6317**

Issue: Note to be generated when Bill Review drop down is selected with date. Needs to be reportable.

Resolution:

USER: A system note is generated at the time Bill Review is selected for a coverage.

NJPLIGA ONLY

Claim Maintenance - Transaction: Vendor TIN

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6324**

Issue: Add Providers TIN in transaction history with the ability to sort and filter by TIN instead of Provider name. Please add the tax id for the vendor where there is a related vendor. Please mask the ID based on the same PNPI rules used in the MSP info. Sort and Filter should work eventhough the user may not be able to see the TIN values. This is a search function only; the TIN column should be excluded from any related reports or exports from the transaction screen.

Resolution:

USER: Payee Tax ID Information is now included in the grid. It is controlled by the PNPI security option. Users with the PNPI security can see the number, all others see stars. You can still sort or filter on the ID even if it is masked with stars.

Claim System: Alerts

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6204**

Issue: When alerts requiring approval are created please check for see if an approver is out of office (case 6203). If any approvor on the alert is out of office then the approvers out of office message should be displayed and the user should be given the opportunity to cancel the action requiring an approval.

Resolution:

USER: When alerts requiring approval are created, if any approvor on the alert is out of office; then that approver's out of office message will be displayed. The user will then be given the opportunity to cancel the action requiring an approval.

Claim System: Multiple Instances

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **5880**

Issue: Ability to open a multiple instances of the claim system.

Resolution:

USER: Users can now open as many instances of the claim system as they want (subject to the available resourses on the workstation). Users should take care to keep track of multiple instances to be sure they do not confuse which claim they are entering data on.

Claim System: Screen Maximization

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **5882**

Issue: They would like to be able to maximize the screen and save the screen size settings. At this point ok to have the screen maximized but not fully used.

Resolution:

USER: Screen can be maximised and the setting will be memorized when the user reenters the system.

Claim System: ShoreTel Integration

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6186**

Issue: Claim Number Validation – This would be done using ShoreTel Call Control Scripts using SQLConnect and SQLExecute to access an SQLView to the claim table. A select command would get the internal key of the claim with claim number matching the caller input. Return value 0 indicates an invalid claim number; ShoreTel should re-query the caller for a valid claim number. When a valid claim number is provided, both the claim number and key would be stored in the profile. View needs to include the policy number; when the select is by policy number it should select the max claimno to get the most recent.

Resolution:

USER: Feature has been provided but requires further implementation from ShoreTel

CFP ONLY

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6187**

Issue: Open Caller Claim from command line. ELCMS application will be launched; if already open a new iteration will be launched. It will be logged in as the user related to the specified AgentNumber (stored in user maint. See case 6311). That ELCMS application will open the Claim Maintenance Window with the focus on the Claim tab and find the specified claim.

Resolution:

USER: Feature has been provided but requires further implementation from ShoreTel

CFP ONLY

Collections - Collection: Adding Judgments

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6313**

Issue: If a judgement is added in collections to a collection that has a linked claim, the added judgment should be reflected in the linked claim. This will require the user to select the appropriate claimant if there is more than one on the claim.

Resolution:

USER: Judgements added in collections will now be reflected in the claim view.

NJPLIGA ONLY

Collections - Search: Print Button

Release: 5.03 **Task Type:** Bug **External Ref:** **Case No:** **6240**

Issue: Collections window, Search tab prints grid. We probably do not need a print function for this screen. Please disable the button.

Resolution:

USER: Print button has never produced a formatted report. The button has been disabled for this screen.

NJPLIGA ONLY

Excel Export: Print Button

Release: 5.03 **Task Type:** Bug **External Ref:** **Case No:** **6245**

Issue: Excel Export prints grid. We probably do not need a print function for this screen. Please disable the button.

Resolution:

USER: Print button has never produced a formatted report. The button has been disabled for this screen.

Import/Export: Screen Changes

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **4973**

Issue: Please make seperate application tree items for Import vs. Export. For both the Import and Export tabs rather than a dropdown make a grid showing Import or Export Name, Last Used date and a help button; grid should default to filter out disabled but have option to include. Please add item level security for each Import and Export. Make date and date range criteria relative vs. specific, ie 'Prior Quarter' or 'Incept thru Prior Month'. Add Memorized Exports similar to Memorized Reports in Flex reports but critieria will be far simpler.

Resolution:

USER: The Import/Export menu selection has been seperated into two seperate options from the menu; one for Import and another for Export. The dropdowns for available Imports or Exports have been replaced by a grid that displays the available options. Disabled options are filtered out by default but can be included through the use of a checkbox. A last run date has been added to the grid as well as buttons for a future help system. Date ranges similar to the reports have been added to the criteria as well as the ability to Memorize the exports

Letters:

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6355**

Issue: Please add DCD No (formerly WCAB No) to the Letter Source for Claim Letters also.

Resolution:

USER: DCD number has been added to the Letter Claim datasource for HIGA

HI HIG,HID,HIGA,HIH,HUI ONLY

Loss Notice - Suffix:

Release: 5.03 **Task Type:** Bug **External Ref:** **Case No:** **6225**

Issue: Every time a suffix is added, the medical record for the related claimant should be reevaluated

Resolution:

USER: The medical records are being reevaluted when suffix information for the claimant are entered

Loss Notice:

Release: 5.03 **Task Type:** Task **External Ref:** **Case No:** **6249**

Issue: For CFP the Type field should be defaulted to Other

Resolution:

USER: The Claim Type is defaulting to Other when adding a claim through Loss Notice and Quick Post

CFP ONLY

Notification: Print Button

Release: 5.03 **Task Type:** Bug **External Ref:** **Case No:** **6246**

Issue: Notification window both tabs print free form. We probably do not need a print function for this screen. Please disable the button.

Resolution:

USER: Print button has never produced a formatted report. The button has been disabled for this screen.

Policy Verification - HIGA: Print Button

Release: 5.03 **Task Type:** Bug **External Ref:** **Case No:** **6247**

Issue: Window prints claim grid. We probably do not need a print function for this screen. Please disable the button.

Resolution:

USER: Print button has never produced a formatted report. The button has been disabled for this screen.

HIGA ONLY

Report - Adjustment Transaction:

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6363**

Issue: Please add selection criteria for Company and Claim number. If there is a match to either the source or destination report all three records in the adjustment set.

Resolution:

USER: Company and Claim number selection criteria have been added

Report - Claim Summary:

Release: 5.03 **Task Type:** Task **External Ref:** **Case No:** **6353**

Issue: When the report is grouped by LOB it needs to have a sub total for each LOB.

Resolution:

USER: Sub totals have been added to LOBs in the Claim Detail report

Report - Claim Transaction Company Summary:

Release: 5.03 **Task Type:** Task **External Ref:** **Case No:** **6259**

Issue: Need to move the first column to the left of the screen to allow more space for the Subrogation and Loss Received amounts

Resolution:

USER: Print button now produces a formated report.

Report - Notes:

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6199**

Issue: Currently defaults the date range to the the prior month. User going doing this from the report menu is more likely to want all dates. Please remove the defaults on date range. Please also add the the date options drop down to the date range selection.

Resolution:

USER: Date field defaults have been removed from the criteria. Added a Date Range drop down field

Report - Vendor Detail Report:

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6327**

Issue: Please enhance the report to include all fields represented in the vendor maint. screen.

Resolution:

USER: Report has been changed to include all the fields that reside on the vendor maintnance screen

Reports - Flex Reports: Check Register

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6403**

Issue: Please add a criteria for Claim Type. Include implied types for the non-claim checks; Admin and UEP.

Resolution:

USER: The Claim Type criteria has been added to the Check Register specific criteria. It does include the implied types for the non-claim checks; Admin and UEP

Reports - Flex Reports: Claim Summary

Release: 5.03 **Task Type:** Bug **External Ref:** **Case No:** **6453**

Issue: In the Claim Summary Flex report the Coverage Criteria is not being applied to the find.

Resolution:

USER: Criteria issue fixed, report will filter information based on the Coverage criteria selected

Reports - Flex Reports: Export

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6252**

Issue: The title in the grid part of the window is titled “Summary Report”. Can we have the title include the row count as in “Summary Report (999,999 rows)” ideally it should update as the rowcount changes with filtering. This should apply to all flex reports summary or detail views.

Resolution:

USER: The title of the summary report has been changed to include the the row count. The row count changes with the changing of the filtering of the grid.

Reports: Company Financial Report

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6419**

Issue: A powerbuilder report to replace the UDS D Export Hard Copy process. Criteria should be Fund (default if only one), Company, Period ending date.

Resolution:

USER: A new report has been added to replace the current HARDCOPY/SPREADSHEET REPORT process for Company Financial Reporting. It is no longer necessary to first do the excel export and merge the results into the spreadsheet. This feature is now available in the report menu.

Reports: Prior Claim Report

Release: 5.03 **Task Type:** Task **External Ref:** **Case No:** **6282**

Issue: CFP would like a change to the arrangement of the Prior Claim Report. No new fields are required.
They would like the following at the top of the report -
Claim No - Loss Date - Policy No - Insured - Type Of Loss
Under these fields they want the title Prior Claim Report followed by Report Print Date and then Prior Losses.

Resolution:

USER: Changes have been made to the Prior Claim Report as per Estees request

CFP ONLY

Reports: Related Claims

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6345**

Issue: Please create a Related Claim Report to show all claims in Related Claim groups. Report grouping header should be groupid and groupcd. Report detail fields should be IGA, ClaimNo, Claimant, PolicyNo, Insured, DOL, Exaimier, Manager, LOB, Status. Selection criteria should be groupid.

Resolution:

USER: A Related Claim report has been added to the system, the report columns are IGA, ClaimNo, Claimant, PolicyNo, Insured, DOL, Exaimier, Manager, LOB, Status. The selection criteria is Group ID

Reports: Save as PDF/Email

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6060**

Issue: All reports should allow output to be saved to PDF or emailed. The save to PDF optiion needs to allow user to specify the save location and use the LightspeedPDF Writer. The email option should allow the user to specifiy To, From, CC, BCC, and subject line; this should go through outlook (like we do for claim letters).

Resolution:

USER: All reports now support saving as PDF and emailing. The email option opens up a Save As dialog box, after saving the file it does not email out the report

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Search - History: Print Button

Release: 5.03 **Task Type:** Bug **External Ref:** **Case No:** **6242**

Issue: CLO History search window, HIH and HIGA tabs, print button enabled but ignored, Adj Tran tab prints grid. We probably do not need a print function for these screens. Please disable the button.

Resolution:

USER: Print button has been disabled

HI HIG,HID,HIH,HUI ONLY

Security - User Maint: UDF Fields

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6311**

Issue: Implement UDFs for User Maintenance.
CFP will use UDF4 for Agent Number (from their phone system) for the ShoreTel integration.

Resolution:

USER: UDFs have been implemented in Security. Use needs to be defined in UDF maintenace.
CFP will use UDF4 for Agent Number (from their phone system) for the ShoreTel integration; CFPA needs to populate with the Agent number.

Table - Copy Notes:

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6319**

Issue: Transfer of Notes from one claim to another. (when incorrectly opened in incorrect fund or company) to complete a “global move”. Please add a Copy Notes option to copy notes from one claim to another.

Resolution:

USER: There is now a "Utilities" section under Tables with a new "Copy Notes" option. To copy the notes from one claim to another first select the source claim and then the destination claim. The feature will copy all the notes from the source claim to the destination claim; selective copying is not supported. The feature will Copy not Move the notes (source claim will still have the original notes).
A system note will be added to both the source and detination indicating tha tthe copy has been done and by who.

Unearned Premium - Bulk: Check Alert Warning

Release: 5.03 **Task Type:** Bug **External Ref:** **Case No:** **6334**

Issue: The check alert warnings when submitting a bulk check should correspond to the check alerts created, not based on the check total. Add a warning for OFAC match

Resolution:

USER: The check alert warning for the UEP bulk check will now be based on the individual check item not on the bulk check total. These will also now be included in the OFAC checking.

Unearned Premium - Policy:

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **4353**

Issue: Please allow insured to be edited after the check has been issued so that re-issueing the check can get the updated info.

Resolution:

USER: Users can now update the insured's information after the check has been issued.

Unearned Premium - Policy: Add Missing Columns

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6380**

Issue: Add homephone, workphone, workextension, faxphone, udf1, udf2, udf3, udf4, email. Shrink comment field to 1536 characters.

Resolution:

USER: Add homephone, workphone, workextension, faxphone, udf1, udf2, udf3, udf4, email fields have been added.

Unearned Premium - Policy: Claim v5.00 look and feel

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6392**

Issue: Apply the v5 look and feel to the UEP Policy tab. Detail Buttons for Contact, Return, Synopsis and PFC/Agent. Contact detail will be similar to Contact detail in Claim/Policy. Return detail will be similar to the lower section of the v4 UEP screen. Synopsis similar to what was done in Claim. PFC/Agent detail will only contain the code, name, contract and balance; the balace will repeat from the Return detail but will not be editable in the PFC/Agent detail.

Resolution:

USER: The Uneaned Premium screen has been redesigned with the Claim v5 look and feel

Unearned Premium: Letter

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **4354**

Issue: Please implement Letters for UEP. Recipients would be the insured, PFC, or Insolvent company (no contacts tab for UEP at this time). Data source should include the company, policy, effect, expire and cancel dates, contract no, balance, net and total return amts. Notes tab will be covered in a seperate task.

Resolution:

USER: Letters are now supported in Unearned Preimium. Each fund must configure any letters before they will be availble.

Unearned Premium: Notes

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6234**

Issue: We will be implementing Letters for UEP. Need to also implement Notes to support letters.

Resolution:

USER: Notes have been implemented for UEP. The screen has the same behaviour as the notes screen for claim

User Preference: Out of Office

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6203**

Issue: Please add an Out of Office Flag for the user under File\Preferences. This should include a brief message field. If a user logs in when this flag is set they should be reminded that the flag is on.

Resolution:

USER: An Out of Office Flag has been added to the user preference screen. When the flag has been set and the user logs in they are reminded that the Flag is on.

Vendor Maintenance: Print Button

Release: 5.03 **Task Type:** Enhance **External Ref:** **Case No:** **6320**

Issue: When printing copies in Vendor Maintenance, by default, will print out 3 blank pages after printing is completed. Needs to use the new Vendor Detail Report.

Resolution:

USER: New Vendor detail report has been added to the system that will print the entire vendor information in the report.