

# Lightspeed Data Solutions

## Release Notes

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### Claim

#### Adjustment: Expense Recovery Received

**Release:** 5.15a      **Task Type:** Enhance      **External Ref:**      **Case No:** 10433

**Issue:** If the destination is Expense recovery received then Expense code is required. Make expense code required if recovery type is expense.

**Resolution:**

USER: Expense code now required for Expense Recovery

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#### Allocation - Allocations:

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10342

**Issue:** Grid Financial columns and company rows. Only include companies selected in company tab. Display only showing calculated allocations.

**Resolution:**

USER: This feature is still under development not yet ready for use.

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#### Allocation - Companies:

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10340

**Issue:** Grid of companies: columns for Sel, IGA, NAIC, Name, Rounding (check box selection). Also entry columns for Time (float with 2 decimals), Claim (\$ amount) and Other (float with 4 decimals) only the column matching the mode from the first tab should be enabled. Sel should default to all selected. One and only one company selected for rounding is required to commit.

**Resolution:**

USER: This feature is still under development not yet ready for use.

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#### Allocation - Financials:

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10339

**Issue:** Find fields for Fund (default if only one) and period (quarter and year). Status field with options for New, Pending, Calculated, Commit and Post. Dropdown for Method (T - Time, C - Claim Amount, O - Other). Dollar amount fields for all the dollar amounts from company financial screens that are user entered. Add mode requires fund, adds next sequential period for the fund.

**Resolution:**

USER: This feature is still under development not yet ready for use.

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#### Allocation - Special:

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10341

**Issue:** Grid Financial columns and company rows. Only include companies selected in company tab. Fields are dollar amount defaulted to zero. User can enter any dollar amount in the fields of the grid.

**Resolution:**

USER: This feature is still under development not yet ready for use.

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#### Allocation:

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10338

**Issue:** New feature to support unallocated income and expense. Tabs for Financials, Companies, Special and Allocations. Calculate button in toolbar when status is new or pending.

**Resolution:**

USER: This feature is still under development not yet ready for use.

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### Bank Export: Payee Name expansion

**Release:** 5.15a      **Task Type:** Enhance      **External Ref:**      **Case No:** 10441

**Issue:** The payee name is truncated to 50 characters, causing the bank to reject mismatches. The name should be expanded to 120 characters.

**Resolution:**

USER: Now supports 120 character payee in export.

### NJPLIGA ONLY

#### Billing:

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10530

**Issue:** Modifications to support Allocation

**Resolution:**

USER: This feature is still under development not yet ready for use.

### BR Reconciliation/Payment: Duplicates

**Release:** 5.15a      **Task Type:** Enhance      **External Ref:**      **Case No:** 10402

**Issue:** 1) Set reason on all with Status Duplicate. Modify Invoices tab to include Disallow column. Disallow amount should reduce issues. Modify Invoice Recon Report to include a line subtracting all Disallowed (Fee comment starting with "Disallow").

**Resolution:**

USER: Improved support for disallowing and reporting duplicate fees

### NJPLIGA,LIGA,IIGF ONLY

### BR Reconciliation/Payment: Missing EOR

**Release:** 5.15a      **Task Type:** Enhance      **External Ref:**      **Case No:** 10403

**Issue:** 1) Set reason on all with Status EOR Not Imported. Modify Invoices tab to include Disallow column. Disallow amount should reduce issues. Modify Invoice Recon Report to subtract Disallowed

**Resolution:**

USER: Improved support for disallowing and reporting fees when EOR is not received.

### Claim Maintenance - Claim: Maximization

**Release:** 5.16      **Task Type:** Task      **External Ref:**      **Case No:** 9314

**Issue:** Claim/Claim tab/Diary button - diary data grid not maximizing

**Resolution:**

USER: Screen now maximizes

### Claim Maintenance - Claimant: Popup from MSP History

**Release:** 5.16      **Task Type:** Bug      **External Ref:**      **Case No:** 10557

**Issue:** The popup from the doubleclick on a row in MSP History needs to be expanded.

**Resolution:**

USER: Popup has been expanded

### Claim Maintenance - Contacts: State filtering

**Release:** 5.16      **Task Type:** Bug      **External Ref:**      **Case No:** 10519

**Issue:** The state is not filtering by the country. This also affects contacts in Notice and Company Maintenance

**Resolution:**

USER: The State is filtering by company on the Contacts tab , however if you already have a state selected and then change the country it does not wipe out the State and lets you save it.  
This is related to the workflow path that the user takes going through the screen. It will be left as is

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### Claim Maintenance - Home Metrics:

**Release:** 5.16      **Task Type:** Bug      **External Ref:**      **Case No:** 10528

**Issue:** In the Payment Request Metric the archived items are showing up by default. The archived Checkbox has no effect. Archived items should only be showing up when the checkbox is checked

**Resolution:**

**USER:** This has been corrected and now will only show current information in the Metric. The user can add the Archived items by clicking on the Archived checkbox

### Claim Maintenance - Home Metrics: Examiner Activity by Suffix

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10234

**Issue:** Similar to Examiner activity but counting suffixes. Valuable for Environmental claims

**Resolution:**

**USER:** Examiner Production Metrics has been added to the Workgroup Metrics

### Claim Maintenance - Letter:

**Release:** 5.16      **Task Type:** Bug      **External Ref:**      **Case No:** 10550

**Issue:** When adding a new user they are not able to get the Letter Security working and cannot see any letters

**Resolution:**

**USER:** Fixed

### Claim Maintenance - Media:

**Release:** 5.16      **Task Type:** Bug      **External Ref:**      **Case No:** 10534

**Issue:** There is an error when clicking the Export button on the Media tab. the File copy fails

**Resolution:**

**USER:** Fixed

### Claim Maintenance - Notes: Operation mode confusion

**Release:** 5.16      **Task Type:** Bug      **External Ref:**      **Case No:** 10415

**Issue:** If the user changes the Operation dropdown, leaves the Notes tab and returns, it reverts to the original Operation value instead of remembering the change

**Resolution:**

**USER:** Fixed

### Claim Maintenance - Suffix: Recovery

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10486

**Issue:** Redesign the Recovery Detail and add an option for Recovery Less Fee. Please add an Option "Received Less Fee". Add an Expense dropdown for Expense codes with Code2="Cash Recpts". Add "Fee" amount and "Net" amount fields; these will be used on the screen but not stored in the database. The current Type and Future Recovery fields are redundant; please eliminate Future Recovery and make the Potential Future Recovery Option use the Type field. The Received Less Fee option should allow the user to select type, enter Recovery Rec'd, Fee amounts, Expense type and Check #. The Payee field should become a lookup to vendor in this mode. The Net amount would be calculated as Rec'd less Fee. This option should generate a Recovery transaction for the Recd amount, an Expense payment for the fee amount, and a manual check for the fee amount with the same check no as the recd check; this manual check should be Posted (no submission needed).

**Resolution:**

**USER:** Recovery detail screen has been re-designed and now supports a Received Less Fee entry option.

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### Claim Maintenance - Suffix: Recovery Received

**Release:** 5.15a      **Task Type:** Enhance      **External Ref:**      **Case No:** 10426

**Issue:** If the recovery received is Expense type then Expense code is required. Please add expense code dropdown. Make it required if recovery type is expense and disabled otherwise.

**Resolution:**

USER: Expense code now required for Expense Recovery

### Claim System: User Activity Logging

**Release:** 5.16      **Task Type:** Task      **External Ref:** 893      **Case No:** 8919

**Issue:** Create specific log note entries claimant changes. The file log note should reflect claimant number being updated, old and new data values, and user performing update. Changes to the Claimant tab Claimant, Contact, Attorney Detail areas should be logged in detail indicating the field(s) updated, before and after values. Indicate the specific claimant number updated.

**Resolution:**

USER: Additional logging for changes to the Claimant tab Claimant, Contact, Attorney Detail

### Company Maintenance:

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10531

**Issue:** Add a "Letter Fields" detail button and move AKA and Long name from Company detail to letter fields.

**Resolution:**

USER: Changes to the Company Maintenance screen.

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10548

**Issue:** Remove the Code field.

**Resolution:**

USER: Code field is no longer needed and has been removed

**Release:** 5.16      **Task Type:** Project      **External Ref:** 2011083004      **Case No:** 10374

**Issue:** Please add date fields for: POC = Proof of Claim Filing Deadline (sometimes different from BAR date), ACT = Activation Date (Date of Insolvency most of the time), CANC = Policy Cancel Date.

**Resolution:**

USER: Fields have been added to the Company Maintenance screen

### Company Maintenance: Configuration

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10312

**Issue:** Cash option. We need to have a grid of funds with the Cash Effective date for each fund. This is to support the Cash Option for UDS C & D reporting. Dates being entered can be last day of prior month or greater (no greater back-dating allowed).

**Resolution:**

USER: Cash Effective date added to support new Cash Reporting option.

### Company Maintenance: Diary

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10230

**Issue:** Add a Diary function for Company Maintenance

**Resolution:**

USER: Diary function has been added.

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### Excel Export:

**Release:** 5.16      **Task Type:** Task      **External Ref:**      **Case No:** 10571

**Issue:** For the exportxl\_spu\_companyfin\_month FIGA would like to have the cmxfund code value be added to the output produced by the stored proc. By including the fund code in the export, it better supports FIGAs need, where they can run the export & parcel out the fund summary data they are seeking for their processing needs.

**Resolution:**

USER: cmxfund has been added

### FIGA ONLY

### Excel Export: exportxl\_spu\_IRS1099

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10538

**Issue:** FIGA would like a version that uses "Non-1099 Logic". Please modify so that General parameter 2 could be used to specify "1099 Logic" or "Non-1099 Logic"  
1099 Logic should be to only include: Checks issued within the criteria time period with No Void Undo and Checks with Void Undo within the criteria time period. For included checks it should consider all issue, void and undo activity from issue to the current run date. Non-1099 Logic should include: Checks with any issue, void and/or un-void activity within the criteria time period. For those checks it should only consider the issue, void and/or undo activity that occurred within the criteria time period. that would include: Checks with any issue, void and/or un-void activity within the criteria time period. If General parameter 2 is omitted it should use 1099 Logic. Please modify help for this change.

**Resolution:**

USER: Export now supports "1099 Logic" or "Non-1099 Logic"

### Export - 1099 Export:

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10459

**Issue:** Please add support for the new Box 11 - Foreign Tax Paid; this is exported in amount code 9. Including adding the box lookup.

**Resolution:**

USER: Now supports box 11

### Export - 1099 Export: Manual Checks

**Release:** 5.16      **Task Type:** Bug      **External Ref:**      **Case No:** 10520

**Issue:** Manual checks should not be included in the export.

**Resolution:**

USER: Export will now exclude Manual Checks

### Export - Bank Export: Payee Validation

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10612

**Issue:** Create a new export with the format the bank requires for Payee Validation.

**Resolution:**

USER: New export created for new bank format

### NJPLIGA ONLY

### Export - UDS V02 "C" Loss & UEP Export: Cash option

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10310

**Issue:** Export based on date paid rather than date requested.

**Resolution:**

USER: Export now supports new Cash Reporting option.

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### Export - UDS V02 Financial Export (D): Cash option

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10311

**Issue:** Export based on date paid rather than date requested.

**Resolution:**

USER: Export now supports new Cash Reporting option.

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### Import - MSP Candidate Wrapped Response Import:

**Release:** 5.15a      **Task Type:** Bug      **External Ref:**      **Case No:** 10472

**Issue:** Appears to be getting the wrong gender value.

**Resolution:**

USER: Fixed

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### Import - UDS V02.2 Claim Import (A):

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10396

**Issue:** Please add warnings for missing claimant SSN or DOB. These are needed if the claimant will be MSP reportable; the import should just warn if they are missing.

**Resolution:**

USER: New warning for missing information now added.

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### Import/Export: Maximization

**Release:** 5.16      **Task Type:** Task      **External Ref:**      **Case No:** 9344

**Issue:** Export/Export tab - top & bottom data grids not maximizing

**Resolution:**

USER: Screen now maximizes

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### Report - Cash Receipts: Fees related to recovery

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10488

**Issue:** Include any Expense Transactions within the date range for Expense codes with Code2="Cash Recpts".

**Resolution:**

USER: Added to support new Recovery less fee option

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### Report - Diary: Diary by Examiner

**Release:** 5.15a      **Task Type:** Bug      **External Ref:**      **Case No:** 10474

**Issue:** Missing the suit column (like from the home diary queue).

**Resolution:**

USER: fixed

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### Report - Flex Reports: Vendor Flex Report

**Release:** 5.16      **Task Type:** Task      **External Ref:** 1159      **Case No:** 10458

**Issue:** Merge the current general criteria into the Report Specific criteria. Replace the General Criteria with General criteria from the Claim Summary Flex Report. Make the Vendor Name criteria "Like" and add an option for "Contains". Add an Expense code criteria. Add a Request Date criteria. Add Expense code and Request date to second tier results.

**Resolution:**

USER: Report criteria have been enhanced and rearranged.

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### Report - Vendor 1099 Form:

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10460  
**Issue:** New box, layout and instructions for tax year 2013.  
**Resolution:**  
USER: Layout modified to support new tax year 2013 changes

### Report - Vendor 1099 Form: Manual Check Exclusion

**Release:** 5.16      **Task Type:** Bug      **External Ref:**      **Case No:** 10521  
**Issue:** Manual checks should not be included  
**Resolution:**  
USER: Manual checks will be excluded from reporting

### Report - Vendor Payment Summary: Manual Check exclusion

**Release:** 5.16      **Task Type:** Bug      **External Ref:**      **Case No:** 10522  
**Issue:** Manual checks should not be included if 1099 Logic is selected  
**Resolution:**  
USER: Manual checks will be excluded from reporting

### Reports - Flex Reports:

**Release:** 5.15a      **Task Type:** Test Bug      **External Ref:**      **Case No:** 10423  
**Issue:** For the Vendor Payment Flex report when the Vendor Type and Vendor Status are both selected as criteria a database error is generated. Error code 207. Invalid Column Name 'cmxtype'  
**Resolution:**  
USER: fixed

### Reports - Flex Reports: Manual Check exclusion for Vendor Payments flex report

**Release:** 5.16      **Task Type:** Bug      **External Ref:**      **Case No:** 10523  
**Issue:** Manual checks should not be included if 1099 Logic is selected  
**Resolution:**  
USER: Manual checks will be excluded from 1099 logic

### Reports - Flex Reports: MSP Suffix

**Release:** 5.16      **Task Type:** Enhance      **External Ref:**      **Case No:** 10398  
**Issue:** Please add a Reportable (flag/check) criteria and column. It would indicate that there is ORM and/or TPOC on the claimant.  
**Resolution:**  
USER: New criteria and result field added.

### Table Maintenance: Grid Dump

**Release:** 5.16      **Task Type:** Task      **External Ref:**      **Case No:** 9491  
**Issue:** IIGF v5.14 - Tables/System/Case Reserve Maintenance - Click Print button results in grid dump  
**Resolution:**  
USER: Print button launches the Case reserve report which can then be printed out if required

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### Type Maintenance: Dropdowns at right cut off

**Release:** 5.16      **Task Type:** Bug      **External Ref:**      **Case No:** 10454

**Issue:** The dropdowns at the right of the free form are cut off.

**Resolution:**

USER: Drop Downs are no longer being cut off. Test is being displayed in full

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### UDS:

**Release:** 5.15a      **Task Type:** Task      **External Ref:**      **Case No:** 10422

**Issue:** UDF F Export for Notes Export for the Guaranty Funds. Criteria should be Company, Fund and Date Range to produce a standard F Export. This is for 5.15a, not to be rolled into the current 5.15. Reliance is asking for a notes dump from the Guaranty funds. They will start with an inception to date and then monthly going forward

**Resolution:**

USER: Notes can now be exported for reporting back to the Receiver.

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