

Lightspeed Data Solutions

Release Notes

Claim v5.06 User (post v5.05)

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Claim

Auto Pay - AutoPay:

Release: 5.06 **Task Type:** Bug **External Ref:** **Case No:** 6981

Issue: AutoPay screen acts differently in Add mode than Edit mode, as far as which fields are protected. Please make it more consistent with the Payment window. Also, the Payee Edit security setting enforced in the Payment window was never applied to AutoPay. Please apply.

Resolution:

USER: The Auto Pay Screen and Payment screens are consistent with regards to the field protection. The Payee Edit security has been added to the Auto Pay screen as well

Check - Print:

Release: 5.06 **Task Type:** Task **External Ref:** **Case No:** 6990

Issue: Need to revert the check output to the 5.04 level. 30 Characters for the output file

Resolution:

USER: The Check output has been set back to the 5.04 version levels, 30 characters for the Mail To Name and Address fields

CFP ONLY

Claim Maintenance - Claim: Flags

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 7050

Issue: The term "Non-Covered" has special meaning to the Guaranty Funds. Please change the name of the Non-Covered Flag to "DOL Error".

Resolution:

USER: The term "Non-Covered" has special meaning to the Guaranty Funds. This flag has always been set on claims where the Date of Loss was outside the policy period. We have change the name to be more indicative; the new name is "DOL Error".

Claim Maintenance - Claimant: Medical Detail

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 7030

Issue: TPOC Start date should be required when there is a TPOC amount and conversely there should be a TPOC amount when there is a TPOC Start date. Please add a warning to the user if these conditions are not met. Please add a check for these conditions to the Test button feature.

Resolution:

USER: TPOC Start date should be required when there is a TPOC amount and conversely there should be a TPOC amount when there is a TPOC Start date. User will now be warned if this is not the case.

Claim Maintenance - Claimant: Medical Detail History

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 7035

Issue: Please add column sort and filter to grid.
Please add a double click feature that when user double clicks on a row displays the queue view for the selected import/export filtered for the selected claimant. This needs to have the appropriate PNPI support for SSN and HICN fields.

Resolution:

USER: Column Sort and Filter has been added to the MSP Import/Export history provided from the History button on the claimant Medical Detail screen. Double clicking on a row on the grid will display the queue view for the selected import/export filtered for the selected claimant. The PNPI security applies to the SSN and HICN fields

Claim Maintenance - Claimant: Medical Test Button

Release: 5.06 **Task Type:** Bug **External Ref:** **Case No:** 6965

Issue: Seems to generate false error Error CR07 & CC12. Example NJ Claim 10932-08090-P

Resolution:

USER: The False generation of errors CR07 and CC12 have been corrected and are not longer displayed

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Claim Maintenance - Claimant: Multiple Survivors

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 7060

Issue: Need to support reporting of multiple heirs (survivors) to a given claimant. Example: when the father is the Beneficiary, all of his children could be survivors. Currently only one claimant can be related to a given Beneficiary.

Resolution:

USER: Now supports reporting of multiple heirs (survivors) to a given claimant. NOTE: MSP only supports reporting of 4 survivors; if there are more than four survivors the four survivors with the lowest claimant numbers will be reported to MSP.

Claim Maintenance - Claimant: Name Title and Suffix

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 6861

Issue: Please add a Suffix option to be selected from a dropdown of I, II, III, Jr, Sr. Fullname function should be for UDS last name, first name, middle initial, suffix with out title and without commas. For other than UDS it should be Salutation, first name, middle initial, last name, suffix. without commas.

Resolution:

USER: A name suffix field has been added to the Claimant screen that includes the I, II, III, Jr, Sr drop down options.

Claim Maintenance - Home Alert: New MSP Beneficiary

Release: 5.06 **Task Type:** Enhance **External Ref:** 2011 **Case No:** 7044

Issue: Please create an alert to the examiner when a claimant is advanced from Candidate to Beneficiary

Resolution:

USER: A "New MSP Beneficiary" alert has been added to notify the examiner when a claimant has become a medicare beneficiary.

Claim Maintenance - Home Metrics:

Release: 5.06 **Task Type:** Task **External Ref:** **Case No:** 6883

Issue: FIGA would like to be able to see the ORM and TPOC fields in the MSP Metric view

Resolution:

USER: The ORM status and the TPOC start date columns have been added to the end of the MSP Grid on the Home screen.

Claim Maintenance - Policy:

Release: 5.06 **Task Type:** Bug **External Ref:** **Case No:** 6876

Issue: The Policy and Claim LOB fields are displaying a 1 instead of the Auto LOB that they should be. This is due to the change in the LOB structur for FIGA and the original Auto LOB being disabled. The system still needs to show what the LOB was even if it is now disabled. An example of this is claim LOPA11022048

Resolution:

USER: The correct LOB is being shown although it is now disabled and cannot be added to any new claims.

FIGA ONLY

Claim Maintenance - Transaction: Print Button

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 6968

Issue: Please add an option for Print Preview. In Preview mode offer the Select Page Range option.

Resolution:

USER: Print Preview option has been added to the Transaction Maintenance screen. It allows the user to Print All, Current Page or a range of pages

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Claim Maintenance - Transaction: UDS Transactions

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 6929

Issue: Please create a new "UDS Transactions" Qfind to display the UDS specific transactions for the claim. Currently those are the 80, 90, 91 & 790 transactions.

Resolution:

USER: UDS Transaction Qfind has been added to the Transaction screen, works for Claim and Suffix level transactions. For Claim Level transactions the Claimant information is blank

Claim Maintenance:

Release: 5.06 **Task Type:** Task **External Ref:** **Case No:** 6884

Issue: FIGA wanted a way to log the Suit Flag setting changes. Could this be added to the user log

Resolution:

USER: Suit Flag setting changes are being recorded in the User Activity Log

Claim Maintenance: Days Open

Release: 5.06 **Task Type:** Enhance **External Ref:** 2009 **Case No:** 5062

Issue: Report showing length of time claims are open. Users would like to utilize this information to gauge examiner production, i.e. is one examiner holding onto claims longer and not closing in a timely manner. This would also serve as a tracking for a tail of a claim, i.e. insolvency book of business had an average length of time per claim, and we would be able to project future staffing requirements if a new insolvency of the same type were to come to the Association.

Please add a Days Open field to the Misc Popup on the Claim Tab. This should be recalculated in a nightly process for open claims and claims recently closed. Calculation should be in whole days, the close date should be considered an open date since it was open for part of the day. Add this field to the claim grids for Metrics such as Open Claim. Add a performance Metric for Average Days Open.

Resolution:

USER: A Days Open field has been added to the Misc Popup on the Claim Tab. It is recalculated every night on open claims and claims recently closed. Value is displayed in whole days for any day it was open for any part of the day. The field has been added to the claim grids for Metrics such as Open Claim. A performance Metric for Average Days Open has been added.

Release: 5.06 **Task Type:** Enhance **External Ref:** 2009 **Case No:** 7009

Issue: Please add a Days Open field to the Misc Popup on the Claim Tab. This should be recalculated in a nightly process for open claims and claims recently closed. Calculation should be in whole days, the close date should be considered an open date since it was open for part of the day.

Resolution:

USER: A Days Open field has been added to the Misc Popup on the Claim Tab. It is recalculated every night on open claims and claims recently closed. Value is displayed in whole days for any day it was open for any part of the day. The field has been added to the claim grids for Metrics such as Open Claim. A performance Metric for Average Days Open has been added.

Release: 5.06 **Task Type:** Enhance **External Ref:** 2009 **Case No:** 7010

Issue: Please add a Days Open to the claim grids for Metrics such as Open Claim.

Resolution:

USER: A Days Open field has been added to the Misc Popup on the Claim Tab. It is recalculated every night on open claims and claims recently closed. Value is displayed in whole days for any day it was open for any part of the day. The field has been added to the claim grids for Metrics such as Open Claim. A performance Metric for Average Days Open has been added.

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Claim Maintenance: Days Open

Release: 5.06 **Task Type:** Enhance **External Ref:** 2009 **Case No:** 7011

Issue: Please add a performance Metric for Average Days Open.

Resolution:

USER: A Days Open field has been added to the Misc Popup on the Claim Tab. It is recalculated every night on open claims and claims recently closed. Value is diplayed in whole days for any day it was open for any part of the day. The field has been added to the claim grids for Metrics such as Open Claim. A performance Metric for Average Days Open has been added.

Claim System: MSP

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 6992

Issue: EMB claims (claims on company NAIC=NJEMB) are Reinsurance claims and are therefor exempt from MSP reporting. Claimants on EMB claims should be marked with MSP status Exempt. This should be applied to all existing claimants, new claims and new suffixes on existing claims.

Resolution:

USER: The claimants on EMB claims have been marked as exempt for MSP. Any new claimants default to an Exempt status when added to these claims

NJPLIGA ONLY

Diary: Date Entry

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 4743

Issue: Warn user if they select a diary date that is a weekend or holiday. This shold be a warning only.

Resolution:

USER: Diary due and Alert dates will notify the user if they fall on a weekend or a holiday.

Export - MSP Candidate Wrapped Export:

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 7034

Issue: We should continue to check even once a beneficiary is identified so we can pick up name changes and corrections. Please expand the criteria for the export to include claimants with MSP status Candidate, Beneficiary, Reported and Error.

Resolution:

USER: The criteria for the export has been expanded to include the Candidate, Beneficiary, Reported and Error

Imaging: Check Copies

Release: 5.06 **Task Type:** Project **External Ref:** **Case No:** 6722

Issue: ImageRight Integration Check Copy

Resolution:

USER: File copies of HIGA's checks will be included in the ImageRight file.

HIGA ONLY

Imaging: FUP Integration for Collections

Release: 5.06 **Task Type:** Project **External Ref:** **Case No:** 6448

Issue: FUP Integration for Collections – This is a nightly process that passes indexing info for new and changed Collections to the ImageRight system. This process requires the ImageRight File Update Import and the ImageRight Utility Scheduler; see Required Components in the Assumptions and Definition section of this document. This feature has not yet been developed.

Resolution:

USER: FUP modified due to changes in specs.

NJPLIGA ONLY

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Imaging: ImageRight Integration Phase 2

Release: 5.06 **Task Type:** Project **External Ref:** **Case No:** 6677

Issue: NJIGA ImageRight Integration Phase Two.

Resolution:

USER: NOT YET READY FOR TESTING due to pending Specification Revision.

NJPLIGA ONLY

Imaging: Indexing Integration for Collections

Release: 5.06 **Task Type:** Project **External Ref:** **Case No:** 6754

Issue: Indexing Integration for Collections – Collections Documents in the ImageRight indexing queue can be indexed from the Collections system. This process requires the ImageRight Desktop Active X control; see Required Components in the Assumptions and Definition section of this document.

Resolution:

USER: Indexing Integration for Collections has been implemented

NJPLIGA ONLY

Imaging: Open File Integration for Collections

Release: 5.06 **Task Type:** Project **External Ref:** **Case No:** 6755

Issue: Open File Integration for Collections – A button will be provided in the Collections screen allowing the user to bring up the IR folder for the Collection when the user selects the button. This button will bring up the ImageRight folder corresponding to the current Collection in the Lightspeed system. This process requires the ImageRight Desktop Active X control; see Required Components in the Assumptions and Definition section of this document

Resolution:

USER: Open File Integration for Collections has been implemented

NJPLIGA ONLY

Imaging: Workflow lookup

Release: 5.06 **Task Type:** Project **External Ref:** **Case No:** 6725

Issue: ImageRight Integration Workflow lookup

Resolution:

USER: Workflow lookup has been implemented

HI HIG,HID,HIGA,HIH,HUI ONLY

Import - MSP Candidate Response Import:

Release: 5.05a **Task Type:** Enhance **External Ref:** **Case No:** 6916

Issue: Please generate a System Note with Type "MSP" indicating "Claimant [number] identified as a Medicare Beneficiary by CMS" when a Disposition code 01 is returned. No note should be created unless there is a code 01. Please backfill any notes for previously processed Imports backfilled notes should be dated with the live date from the import.

Resolution:

USER: A note will now be created when a claimant is identified as a Medicare Beneficiary. The update will backfill notes for any pre-existing Beneficiaries.

Import - MSP Claim Response Import:

Release: 5.05a **Task Type:** Enhance **External Ref:** **Case No:** 6917

Issue: Please generate a System Note with Type "MSP" indicating "Claimant [number] successfully reported to CMS with ORM" when a Disposition code 01 is returned, or "Claimant [number] successfully reported to CMS without ORM" when a Disposition code 02 is returned or "CMS reported issues with Claimant [number] when any other Disposition code is returned. Please backfill any notes for previously processed Imports backfilled notes should be dated with the live date from the import.

Resolution:

USER: System notes will now be generated for all claimants in a MSP Claim Response file indicating the disposition code.

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Import - UDS V02 "C" Liq Import:

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 6633

Issue: Validate and warn if there are gaps or overlaps in the reporting period. The filenames indicate the reporting period. Generally speaking there should not be any gaps or overlaps in the periods. If the file being imported would produce a gap or overlap the system should present a warning. This should be an warning only since there are occational exceptions.

Resolution:

USER: Validations and warnings have been added

HI HIG,HID,HIH,HUI ONLY

Loss Notice - Claimant: Medical Detail

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 7031

Issue: TPOC Start date should be required when there is a TPOC amount and conversely there should be a TPOC amount when there is a TPOC Start date. Please add a warning to the user if these conditions are not met. Please add a check for these conditions to the Test button feature.

Resolution:

USER: System will warn the user if there is a TPOC Date without an amount or an amount without a date. The test feature will also check for this and inform the user if the criteria is not met

Loss Notice - Claimant: Name Title and Suffix

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 6862

Issue: Please add a Suffix option to be selected from a dropdown of I, II, III, Jr, Sr. Fullname function should be for UDS last name, first name, middle initial, suffix with out title and without commas. For other than UDS it should be Salutation, first name, middle initial, last name, suffix. without commas.

Resolution:

USER: A Sfx field has been added to the Claimant screen that includes the I, II, III, Jr, Sr drop down options.

Loss Notice: Manager Assignment

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 6211

Issue: Please default Manager based on Examiner assignment (see task 6985).

Resolution:

USER: A manager field has been added to the screen that displays the list of active managers

Medicare Second Payee:

Release: 5.05a **Task Type:** Enhance **External Ref:** **Case No:** 6922

Issue: Please modify the functions that promote Nominees to Candidates and that perform the Test on Claimant Medical info. When evaluating for the presence of a SSN we should perform minimum SSN validation: SSNs should be exactly 9 digits, the digits should not be all the same, the digits should not be sequential as in "123456789". The first three characters can not be "000", the middle two characters can not be "00" and the final four characters can not be "0000". Please revert any Candidates to Nominee if they do not meet these new criteria.

Resolution:

USER: Basic SSN validations have been added.

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 6926

Issue: Please modify the Test Button on Claimant Medical info. When evaluating for the presence of a SSN we should perform minimum SSN validation: SSNs should be exactly 9 digits, the digits should not be all the same, the digits should not be sequential as in "123456789". The first three characters can not be "000", the middle two characters can not be "00" and the final four characters can not be "0000".

Resolution:

USER: SSN check has been included in the Test button features. SSNs must be exactly 9 digits, the digits cannot be all the same, the digits cannot be sequential as in "123456789". The first three characters can not be "000", the middle two characters can not be "00" and the final four characters can not be "0000".

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Medicare Second Payee: Closed MSP Status

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 7036

Issue: Please add a 'Closed' MSP Status. Users with MSP Override permissions (1 or 2) should be allowed to change to this status if the claimant has not yet been reported. Once in this status claimant should no longer be included in the Query or MSP Claim reporting processes.

Resolution:

USER: A Closed MSP Status has been added to the Status drop down that can be accessed with Security level 1 or 2.

Payment - Claim:

Release: 5.06 **Task Type:** Task **External Ref:** **Case No:** 6920

Issue: When information is put in the overflow screen for a loss payment, the Pay To fields should indicate to the user that the overflow information takes precedence. The first Pay To field should display the first 20 characters of the Overflow entry followed by 20 periods. The second field of Pay To should say See Overflow. This should be retroactive.

Resolution:

USER: Changes have been made to the overflow feature showing to the user that there is overflow information present on the payment. The first Pay To field displays the first 20 characters of the Overflow entry followed by 20 periods. The second field of Pay To says See Overflow.

Payment - Claim: Alert for payment on DOL Error claim

Release: 5.06 **Task Type:** Enhance **External Ref:** 2009 **Case No:** 5064

Issue: Non-covered label changed to DOL error; see related task 7050
Request was "Force examiner to document payment on DOL Error claims". This is difficult to do but we can flag the verifier to check that it has been documented. Please enhance to generate a payment alert on any payment on a DOL Error claim. Please add a special rule to govern this alert. User entering the payment should see an alert message "Payment made on a DOL Error claim. This should be documented in notes."

Resolution:

USER: IMPLEMENTATION HAS BEEN POSTPONED TO v5.07

Payment - Claim: Name Title and Suffix

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 6863

Issue: For payments to Claimant, please incorporate the new Title and Suffix options. Fullname function should be Salutation, first name, middle initial, last name, suffix. without commas.

Resolution:

USER: New Suffix field will now be included in the payee name for payments to a Claimant the full name on the check in the form of Salutation, first name, middle initial, last name, suffix. without commas.

Report - Notes:

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 6987

Issue: Currently in the application tree we have a Notes report and a System Notes report. Both of these are only for Claim notes. Please include Loss Notice Notes in this report. Also, please change the name in the tree to "Notes - Claim & Loss"

Resolution:

USER: Loss Notice Notes have been included in the report and it has been renamed to Notes- Claim & Loss.

Report - Notes: Collections

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 6417

Issue: Please add a report for Collections Notes

Resolution:

USER: Collections notes report has been added, able to set criteria based on Collection number and Notes created date range

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Report - Notes: Company

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 6988

Issue: Please add a report for Company Notes

Resolution:

USER: A Company Notes report called Notes- Company has been added to the system

Report - Notes: Unearned Premium

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 6986

Issue: Please add a report for Unearned Premium Notes

Resolution:

USER: Notes report for UEP has been added to the system

Reports - Flex Reports:

Release: 5.05a **Task Type:** Bug **External Ref:** **Case No:** 6921

Issue: MSP Suffixes Flex Report generates a database error

Resolution:

USER: MSP Suffixes report has been corrected

Release: 5.06 **Task Type:** Task **External Ref:** **Case No:** 7028

Issue: Need to make some changes to the scheduling of the Flex Reports. The user should not be required to publish the report to schedule it. The File type to be moved to before the File Name and should default to excel. The File name should default to the Saved Name of the report and should not require the user to put in the file type. The File Path should default to the entry in Company Config and should be a UNC path.

Resolution:

USER: Flex reports can now be scheduled without needing to be published. The File type defaults to Excel and the name defaults to the save name.

Release: 5.06 **Task Type:** Test Bug **External Ref:** **Case No:** 6903

Issue: In the Claim Search Flex report, the "Loss County" values are being reported as numbers and not the name of the county

Resolution:

USER: Number values have been replaced with the county names

Reports - Flex Reports: MSP Suffixes

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 6912

Issue: Please add MSP Export Status to the results grid.

Resolution:

USER: MSP Export status has been added to the grid for the MSP Suffixes Flex Report

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 7037

Issue: Please add Open and Closed dates to the results grid following the claim status column. Open should be the earliest and closed should be the most recent.

Resolution:

USER: Open and Close dates have been added to the report grid following the Claim No.

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Reports - Flex Reports: MSP Suffixes

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 7071
Issue: Please add the Cause code to the output grid next to the Cause Description.
Resolution:
USER: Cause Code has been added to the output and to the exported Excel file

Reports - Flex Reports: Scheduled reports

Release: 5.06 **Task Type:** Bug **External Ref:** **Case No:** 6947
Issue: For the LS Scheduler we need to have some fields as a requirement before the schedule can be set. The Cycle Length and Date unit should be required
Resolution:
USER: The Cycle Length and the Date Unit are required fields when scheduling a report

Search: PNPI

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 7039
Issue: Please add PNPI support to the Search screen (criteria and grid)
Resolution:
USER: PNPI has been applied to the search screen. PNPI Security controls what can be seen on the Tax ID field in search. With the security option the user is able to see the Tax ID Value

Search: Re-Search

Release: 5.06 **Task Type:** Enhance **External Ref:** 2008 **Case No:** 4534
Issue: Searching assistance/memory – last 10, 20, 30 Claim number that you used, last 10 estates, etc.
Resolution:
USER: Search Cycle buttons are available and allow the user to cycle through past search criteria. After navigating to the desired search criteria the user can click OK and the results will be returned.

User Preference:

Release: 5.06 **Task Type:** Task **External Ref:** **Case No:** 7038
Issue: Add a Save Path field to the User Preference screen that will be the default location for the user when they save/Export reports or when they do Excel Export.
Use the Logic already in the Schedule memorized Report for the fields File Type, File Name and Path. Apply the file extension to the file name based on the File Type chosen by the user.
Resolution:
USER: A Save Path field has been added to the User Preference screen that will be the default location for the user when they save/Export reports or when they do Excel Export

Vendor: Letter Contacts

Release: 5.06 **Task Type:** Enhance **External Ref:** **Case No:** 6837
Issue: Please add flags to the vendor table for claim, company, collections, and uep recipients. The flagged vendors should be globally available as letter recipients for all letters in the selected sources.
Resolution:
USER: Check boxes have been added to the Vendor Maintenance screen to select the sources to which the Vendors will be added