

Client Product Release October 2023 - 10.1

WHAT'S NEW IN THIS RELEASE

Feature	QL	SL
Record Display - Retaining Column View, Search and Filter View	✓	✓
Policy Update - Add Spec/Agg Final Filing Period and Date		✓
Policy Update - Notices - Ability to Auto Send		✓

OVERVIEW

Ringmaster is pleased to provide you with an overview of the changes that will be introduced into Smart-LinQ during the next release.

I. Record Display View

- A. In all record sets when you make a change to your view within this record set, the view or updates enabled by adding columns, creating or executing a saved filter or using the search tool will be retained during this **"browser session"** when you navigate away from this screen, and then back to this same record set.
 1. This clip will provide an example of the experience when adding screens to your selected record set and navigating away from this screen. [Column Addition to Records](#)
 2. This clip provides an example of the experience when you execute a saved filter. [Saved Filter](#)
 3. This clip provides an example of using the search feature. Note in this example there were several other screens accessed during this view, but when returned to the same records where the view was originally changed, the original "search" was retained. Removing data from the search does open up the view, but continues to retain the columns that were added to the view. [Search Feature](#)

II. Policy Update - Adding Spec and Agg Max Date to File

- A. A new feature has been added to the policy that allows you to capture the number of days that you have to submit your final filing following the Spec Expiration Date. There are two new fields within the Specific and Aggregate policy details screen. This is an informational field and can be added to the policy records for sorting, filtering and downloading.
 1. You will enter the number of days that you have to file all final claims for this policy after the expiration date.
 2. Once the days are entered, it will calculate the Spec or Agg Max Date to File (this is not a data entry field).

Specific	
Coverage(s) *	Medical, Prescription
Spec Incurred Months *	12
Spec Paid Months *	12
Spec Expiration Date	12/31/2024
Spec Final Filing Period	6
Spec Max Date to File	1/6/2025
Spec Deductible *	\$50,000.00
Agg Spec Deductible	\$15,000.00
Max Annual Print	

3. Same policy, but the Spec Final Filing Period was changed to 90 days, and therefore changed the Spec Max Date to File to 3/31/2025.

Specific	
Coverage(s) *	Medical, Prescription
Spec Incurred Months *	12
Spec Paid Months *	12
Spec Expiration Date	12/31/2024
Spec Final Filing Period	90
Spec Max Date to File	3/31/2025
Spec Deductible *	\$50,000.00

4. The field in the Aggregate policy details operates in the same manner.

III. Ability to Update Policy Notice setting to “Auto Send”

- A. This new feature will allow you to select “Auto Send Notices” by activating the toggle, and based on the defined Notice Parameters, the Notice will automatically be released to the trading partner within the applicable portal.
 - 1. Please note that if the trading partner is NOT accessing the Smart-LinQ portal, you will still have to download and send the notices via secure email or the traditional manner that you have in place today.

Notices

Notice Endpoint

FNOL Threshold (%) 50

Large Claim Threshold \$4,000.00

Auto Send Notices

- B. As a result of this new feature, we have also enabled visibility within the portal.
 - 1. A new column will be available within the Notice Records. “Sent By” allows you to view information regarding the distribution/submission of that notice. This is not a default column, but can be enabled for view and/or download.
 - a) If manually sent, this will represent the User’s Name that initiated the last send, and will be reflective of the user profile information.
 - b) If auto sent then it will display “Auto Sent”
 - 2. An additional new column will be enabled for this feature. The “Auto Send” column will be available for display, and will be populated with the following values:
 - a) If auto sent then display “Yes”
 - b) If manually sent then display “No”
 - 3. These additional columns will be default displays within the Member Workspace/ Notices.
 - 4. Carrier portal will have access to the same information in their Notice Records.

Created Date	Sent Date	Sent By	Auto Sent	Download Date
9/21/2023, 10:18 PM	3/2/2023, 7:00 PM			