

ClariNet 1.10 Release Notes

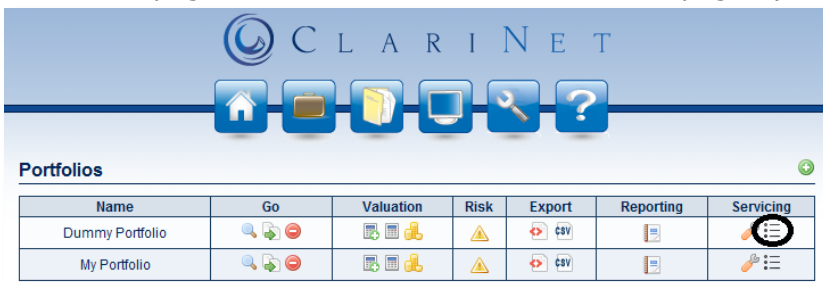


1 Overview

- To Do list for servicing tasks.
- Allow users to reactivate cancelled cases.
- Portfolio summary information.
- Workflow changes (price allocation).
- Case closing on cases sent to external participants.
- Contract package default page simplified.
- Enable A.M. Best rating feed.
- Mouse over hints for case summary tabs.
- Improved report style.
- User configurable paging of lists.

2 To Do List for Servicing Tasks

A new page has been added that allows a user to view all the servicing activities on a portfolio of cases. This page is accessed from the Portfolio list page by clicking on the list icon:





The following page then appears, from which a user can carry out servicing tasks using the play button:



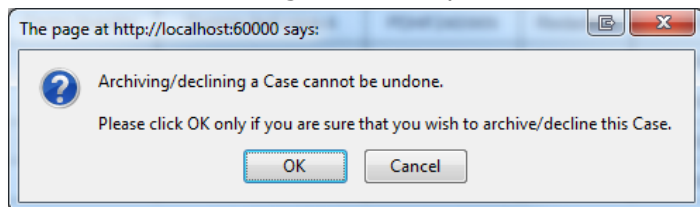
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3 Allow Users to Reactivate Cancelled Cases



On the case lists, pressing the stop button will Cancel a case:

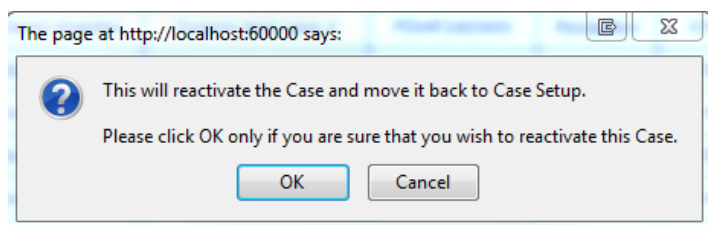
Status	Status Change Date ▾	Go	View
Redaction	01/10/2010		



You will see a warning that this operation cannot be undone:



The case will enter **Archived** status. From here, the play button will return the case to the **Case Setup** status:

Status	Status Change Date ▾	Go	View
Archived	01/10/2010		



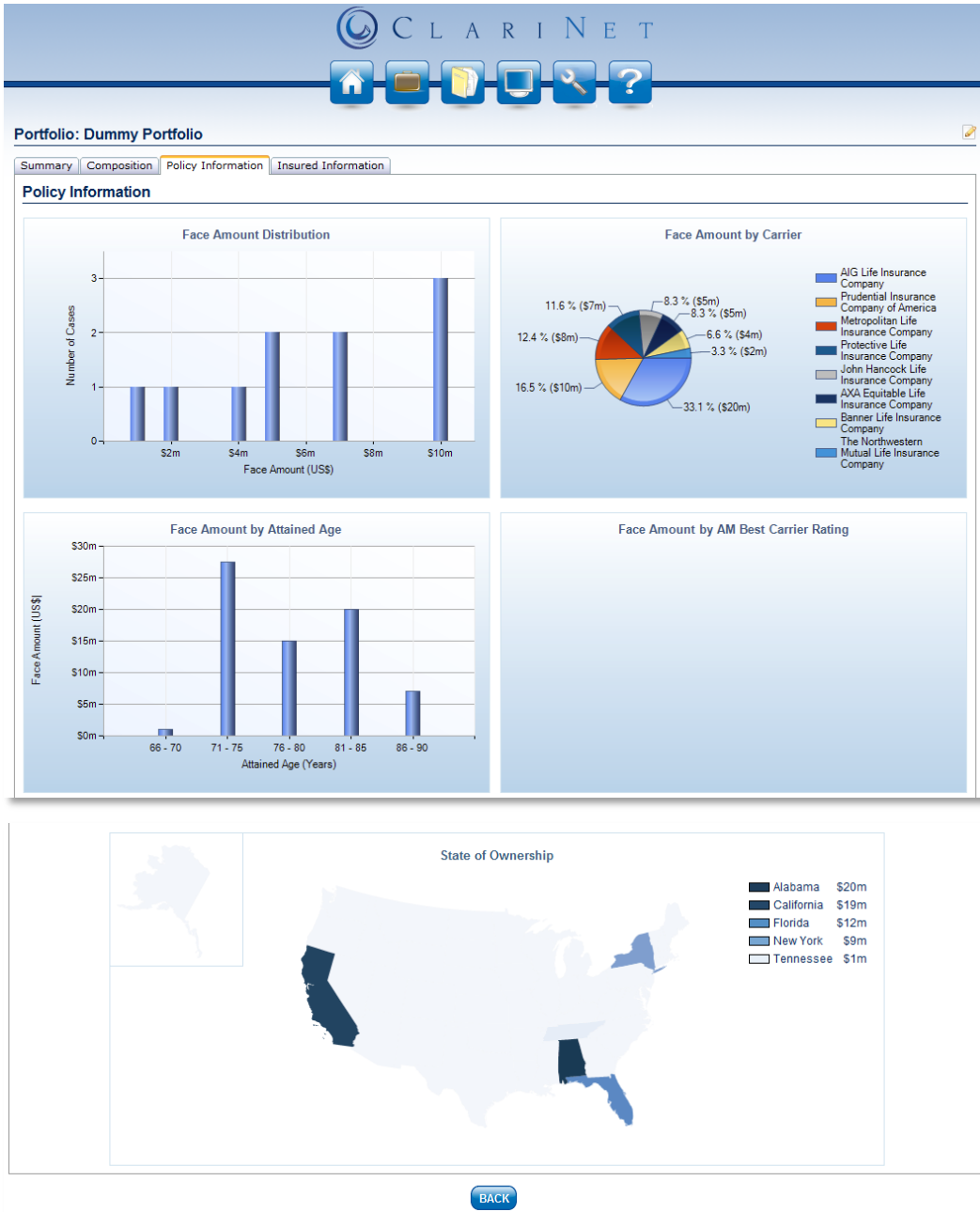
Status	Status Change Date ▾	Go	View
Case Setup	01/10/2010		

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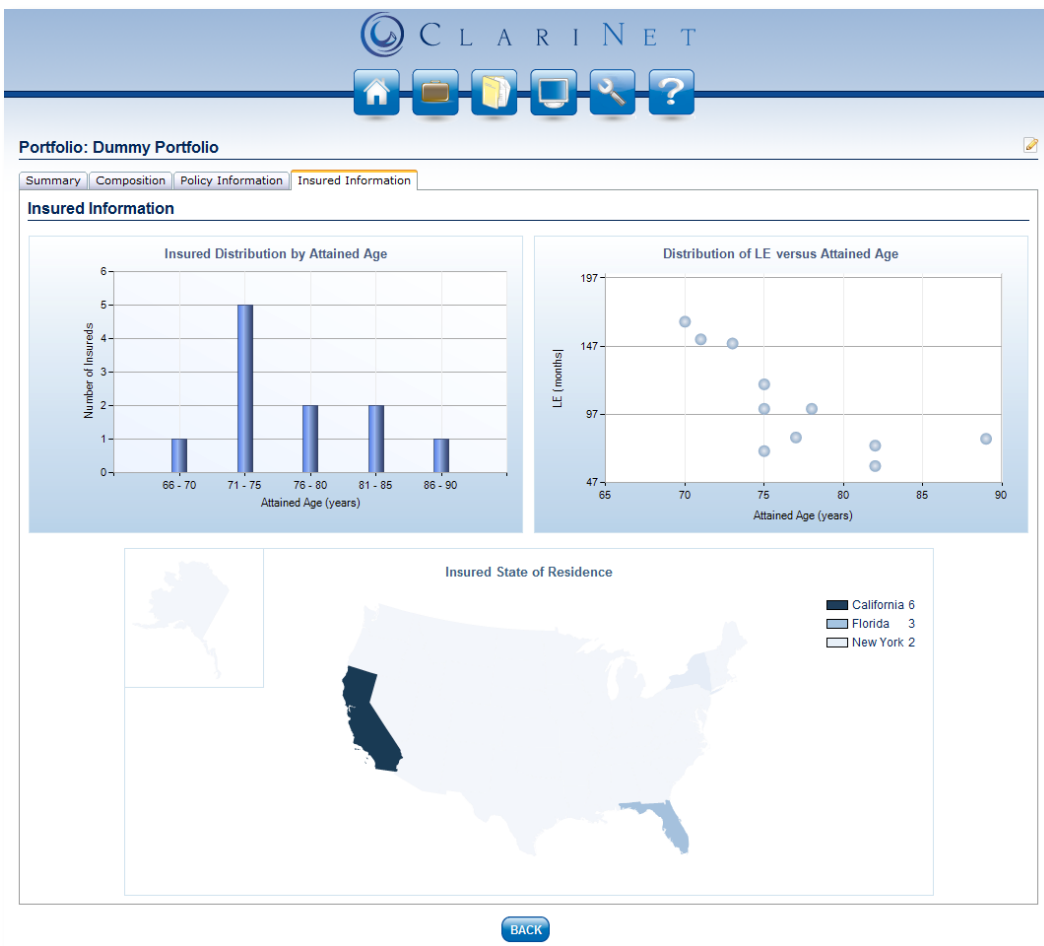
4 Portfolio Summary Information

The portfolio page has been reorganized to make it easier to use. In addition, a page has been added to show a series of graphics which represent the portfolio composition visually¹:



¹ N.b. the "Face Amount by AM Best Carrier Rating" area is blank since we are using test data.

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5 Workflow changes (price allocation)

The Acquisition Price Disbursement (or Price Allocation) page has been added as the first step in the post bidding workflow. After a bid has been accepted, a bidder will see this page:

Acquisition Price Disbursement

Bid Amount: \$1,500,000

Type	Organization/Individual	Payment Method	Amount \$	% Gross Price	% Face Amount	Paid	Paid On	Go
Seller	A Seller	Check payment	1,200,000	80	60	<input type="checkbox"/>		
Agent	An Agent	Check	50,000	3.33	2.5	<input type="checkbox"/>		
Loan Repayment	AXA Life and Annuity Company	Check payment	250,000	16.67	12.5	<input type="checkbox"/>		
Total			1,500,000	100	75			

BACK **DONE**

6 Case closing on cases sent to external participants

Allow users to carry out case closing process on cases sent to external participants. For these cases, the closing process only includes the Price Allocation and Case Closing steps.

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7 Contract package default page simplified

Page that specifies default contents of contract package for each U.S. state has been improved. Each state is listed along with an edit icon:

Contract Package Defaults		
Alabama		
Alaska		
Alberta		
American Samoa		
Arizona		
Arkansas		
British Columbia		
California		
Colorado		
Connecticut		
Delaware		
District of Columbia		
Florida		
Georgia		
Guam		
Hawaii		
Idaho		
Illinois		
Indiana		
Iowa		
Kansas		
Kentucky		
Louisiana		
Maine		
Manitoba		
Maryland		
Massachusetts		
Michigan		
Minnesota		
Mississippi		
Missouri		
Montana		
Nebraska		
Nevada		
New Brunswick		
New Hampshire		
New Jersey		
New Mexico		
New York		
Newfoundland		
North Carolina		
North Dakota		
Northwest Territory		
Nova Scotia		
Ohio		
Oklahoma		
Ontario		
Oregon		
Pennsylvania		
Prince Edward Island		
Puerto Rico		
Quebec		
Rhode Island		
Saskatchewan		
South Carolina		
South Dakota		
Tennessee		
Texas		
U.S. Minor Outlying Islands		
U.S. Virgin Islands		
Utah		
Vermont		
Virginia		
Washington		
West Virginia		
Wisconsin		
Wyoming		
Yukon		

When edit is clicked, a page appears which allows the contents of the package to be set:

Contract Package Defaults

Selected state: Alabama

<input type="checkbox"/> Acknowledgement Form for Life Settlements	<input type="checkbox"/> Divorce Agreement	<input type="checkbox"/> Medical Record
<input type="checkbox"/> Agent Certificate	<input type="checkbox"/> Divorce Decree	<input type="checkbox"/> Medical Record (Linked)
<input type="checkbox"/> Annual Report	<input type="checkbox"/> Escrow Agreement	<input type="checkbox"/> Medical Records Summary
<input type="checkbox"/> Articles of Incorporation	<input type="checkbox"/> Funding Method Request	<input type="checkbox"/> Other
<input type="checkbox"/> Assignment Agreement	<input type="checkbox"/> Grace Notice	<input type="checkbox"/> Partnership Agreement
<input type="checkbox"/> Authorization to Release Policy Information	<input type="checkbox"/> HIPAA Release	<input type="checkbox"/> Personal Identification Document
<input type="checkbox"/> Authorized Signatory List	<input type="checkbox"/> Illustration	<input type="checkbox"/> Physician Statement (Insured)
<input type="checkbox"/> Bankruptcy Discharge	<input type="checkbox"/> Insured Death Certificate	<input type="checkbox"/> Physician Statement (Owner)
<input type="checkbox"/> Beneficiary Consent	<input type="checkbox"/> Insured Tax Return	<input type="checkbox"/> Policy Certificate
<input type="checkbox"/> Beneficiary Identification	<input type="checkbox"/> Lapse Notice	<input type="checkbox"/> Policy Form
<input type="checkbox"/> Bid Acceptance Letter	<input type="checkbox"/> Life Expectancy Report	<input type="checkbox"/> Policy Form (Post Conversion)
<input type="checkbox"/> Broker Certificate	<input type="checkbox"/> Life Insurance Policy Application	<input type="checkbox"/> Power of Attorney
<input type="checkbox"/> Broker of Record Form	<input type="checkbox"/> Life Settlement Agreement	<input type="checkbox"/> Premium Notice
<input type="checkbox"/> Certificate of Good Standing	<input type="checkbox"/> Life Settlement Application	<input type="checkbox"/> Proof of Premium Payment
<input type="checkbox"/> Certificate of Incorporation	<input type="checkbox"/> Life Settlement Application (Broker)	<input type="checkbox"/> Reinsurance Contract
<input type="checkbox"/> Commission Disclosure	<input type="checkbox"/> Limited Power of Attorney (for Death Certificate/HIPAA)	<input type="checkbox"/> Seller Identification
<input type="checkbox"/> Corporate By-Laws	<input type="checkbox"/> List of Designated Contacts	<input type="checkbox"/> Spousal Release and Consent
<input type="checkbox"/> Corporate Resolution	<input type="checkbox"/> List of Partners	<input type="checkbox"/> Tax ID Verification
<input type="checkbox"/> Deceased Beneficiary Documentation	<input type="checkbox"/> Loan Agreement	<input type="checkbox"/> Trust Agreement
<input type="checkbox"/> Deceased Insured Documentation	<input type="checkbox"/> Lost Policy Certificate	<input type="checkbox"/> Verification of Coverage
<input type="checkbox"/> Disclosures		

8 Enable A.M. Best rating feed

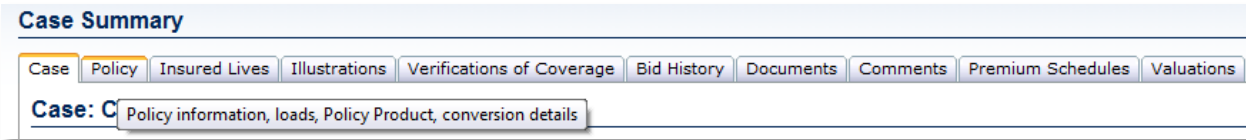
A.M. Best credit rating information regarding carriers will be downloaded quarterly.

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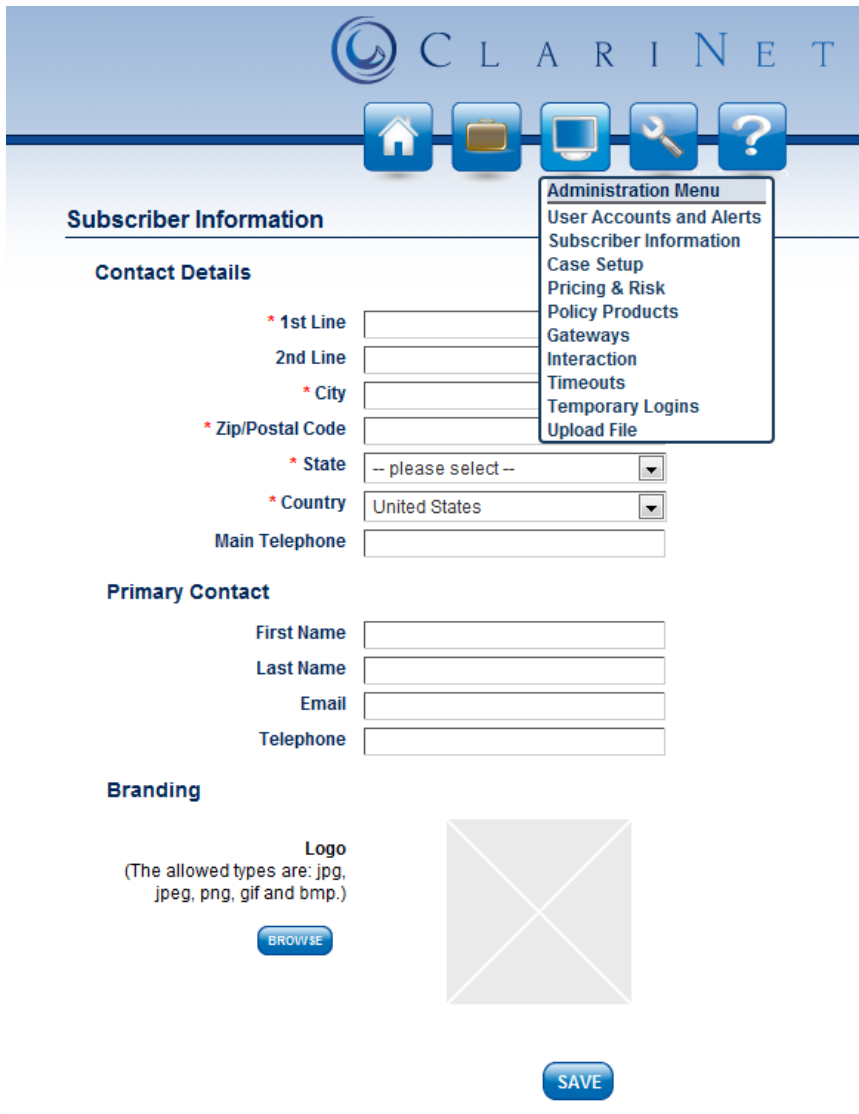
9 Mouse over hints for case summary tabs

To provide helpful hints to users, tooltips have been added to the tabs on the case summary page, for example:



10 Improved report style

Subscribers can upload their own logo to be displayed on their reports. The logo is uploaded from the Subscriber Settings page, accessed from the Administration menu:



An example report is the Case Status Report:

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Generated by TailPDF.NET Evaluation



User specified logo appears on first page.

Case Status Report

Case Identifier	Application Date	Agent	Status	Status Change Date	State of Ownership	Business Unit	Face Amount	Policy Type	Ins 1 Age	Ins 2 Age	21st LE50	AVS LE	EMSI LE50	Fasano LE	ISC LE50	Highest Bid	Highest Bidder	Notes
Case 5588			Redaction	01/10/2010	AL		10,000,000	Universal Life	82	76				74				
ERROR generating this row: No Case ID																		

ClearLife footer appears on each page.

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 page: 1
Generated by demoinvestor on 01/10/2010

11 User configurable paging of lists

The number of items in a list before paging occurs is now user configurable. For example on the home page, in this example there are 12 cases and paging is set to 10, causing two pages of cases.

ction	01/10/2010			
ction	01/10/2010			

Page Size 1 2 > >|

By setting the paging size to 50, there will be a single list of cases:

on	01/10/2010			
on	01/10/2010			

Page Size 1