

CLAIMS UPLOAD & REPORTING

USER GUIDE



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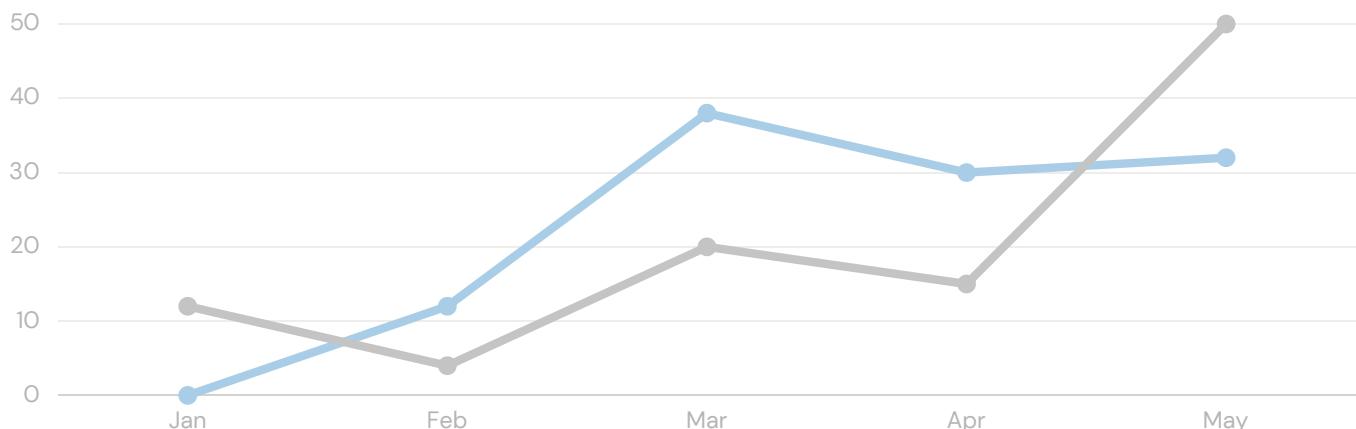
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1 INTRODUCTION

AN INTRODUCTION TO THE ENCOMPASS CLAIMS UPLOAD & REPORTING SOFTWARE

1.1 WHAT THE SOFTWARE DOES

Encompass Home Service Corp. offers a warranty program covering emergency home repairs such as plumbing, electrical, heating, and air-conditioning. Insurance claims are validated or denied (with a reason), and imported into the Claims Database. The Claims database consists of data from two outside sources: Aviva and Echelon. The software's architecture is shown in *Figure 1*.

The software's main purposes are to:

- Replace old records and add new records to the Encompass Claims database.
- Provide customizable search capability, and exportable reports.

1.2 PURPOSE OF THIS DOCUMENT

This User Guide provides new and current users with instructions to **set up users**, **troubleshoot**, and use these **features**:

- Upload spreadsheets to the database
- Check for duplicate records before uploading
- Check for errors in spreadsheets
- Remove a group of records from the database (to be replaced with updated data)
- Search the database – simple and advanced searches
- Sort search results
- Exclude inaccurate records from a search
- Export custom reports

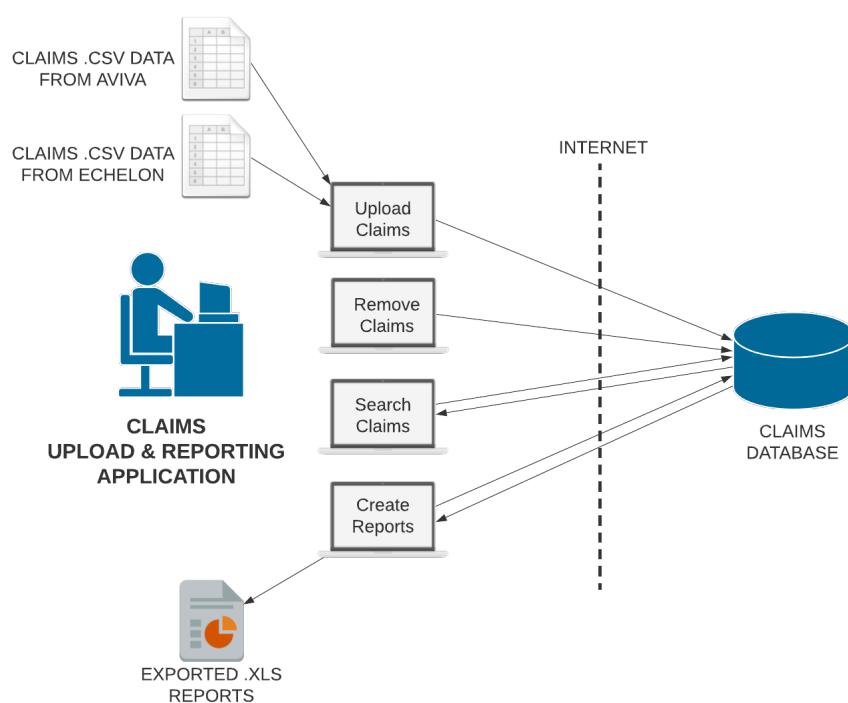


Figure 1

2 GETTING STARTED

SETTING UP A NEW USERS AND KEEPING TRACK OF UPLOADED AND DELETED FILES

2.1 ADDING A NEW USER

Currently, the application has no screen for creating a new user: a database administrator must add (or remove) a user. The user record includes a user name and password.

2.2 KEEPING TRACK OF UPLOADED AND DELETED FILES

At the top right corner of the Claims page there is a 'Data Entry' link:



Click on the link to access the Data Entry screen shown in *Figure 2*. When you upload a file, a record is automatically generated in this table. Removal of a file's records from the database updates the status of the record to 'Deleted'.

| Encompass Claims - Data Entry Records | | | | | | |
|---------------------------------------|--|------------|------------|--------|----------|-------------------------|
| Entry ID | File Name | Start Date | End Date | Source | Status | Timestamp |
| 1 | 2011_2015_all.xlsx | 2011-01-01 | 2015-12-31 | ECH | Uploaded | 2018-11-08 16:37:39.000 |
| 2 | Encompass Claims - acct period 2016.xlsx | 2016-01-01 | 2016-12-31 | ECH | Uploaded | 2018-11-08 16:40:20.000 |
| 3 | Encompass Claims - acct period 2017.xlsx | 2017-01-01 | 2017-12-31 | ECH | Uploaded | 2018-11-08 16:41:27.000 |
| 4 | AvivaClaimsFeb2017Sept2018.xlsx | 2017-03-01 | 2018-09-30 | AV | Deleted | 2018-11-08 18:09:09.000 |
| 5 | ECHEncompassClaimsJan2018June2018.xlsx | 2018-01-01 | 2018-06-30 | ECH | Deleted | 2018-11-08 21:42:42.000 |
| 6 | Encompass Claims 2018 Q3.xlsx | 2018-01-01 | 2018-09-30 | ECH | Deleted | 2019-01-29 17:18:14.000 |
| 7 | AvivaClaimsOct2018.xlsx | 2018-10-01 | 2018-10-31 | AV | Deleted | 2019-01-11 15:11:08.000 |
| 8 | AvivaClaimsNov2018.xlsx | 2018-11-01 | 2018-11-30 | AV | Deleted | 2019-01-04 16:33:47.000 |
| 9 | EHSA - Monthly reports - 2018-12_PW.xlsx | 2018-12-01 | 2018-12-31 | AV | Deleted | 2019-01-11 14:40:15.000 |
| 10 | AvivaClaimsJan2019.xlsx | 2019-01-01 | 2019-01-31 | AV | Deleted | 2019-02-09 16:36:44.000 |

Figure 2

3 REQUIREMENTS FOR FILES

REQUIREMENTS FOR SPREADSHEET FILES FROM ECHELON AND AVIVA SOURCES

3.1 CONVERTING EXCEL FILES (.XLSX) TO COMMA DELIMITED (.CSV) FILES

The Excel (.xlsx) claim files from Echelon and Aviva sources must be saved as .csv files before upload.

To do this, open each file within Excel and select 'Save As'. Then, within the dropdown for selecting file type, select 'CSV (Comma delimited) (*.csv)'.

NOTE: Do not use the other types of .csv files available in the dropdown. They will make French characters display incorrectly within the software.

3.2 FORMAT OF ECHELON AND AVIVA FILES

Upon upload, the software scans through the .cvs spreadsheet for the expected column headings, based on the source of the file (Aviva or Echelon). The order of the columns does not matter. The expected column headings for each source are detailed in *3.3 MAPPING OF DATABASE COLUMNS TO SPREADSHEET COLUMNS*.

Once a row is detected without a claim number and postal code, the software stops searching for further data.

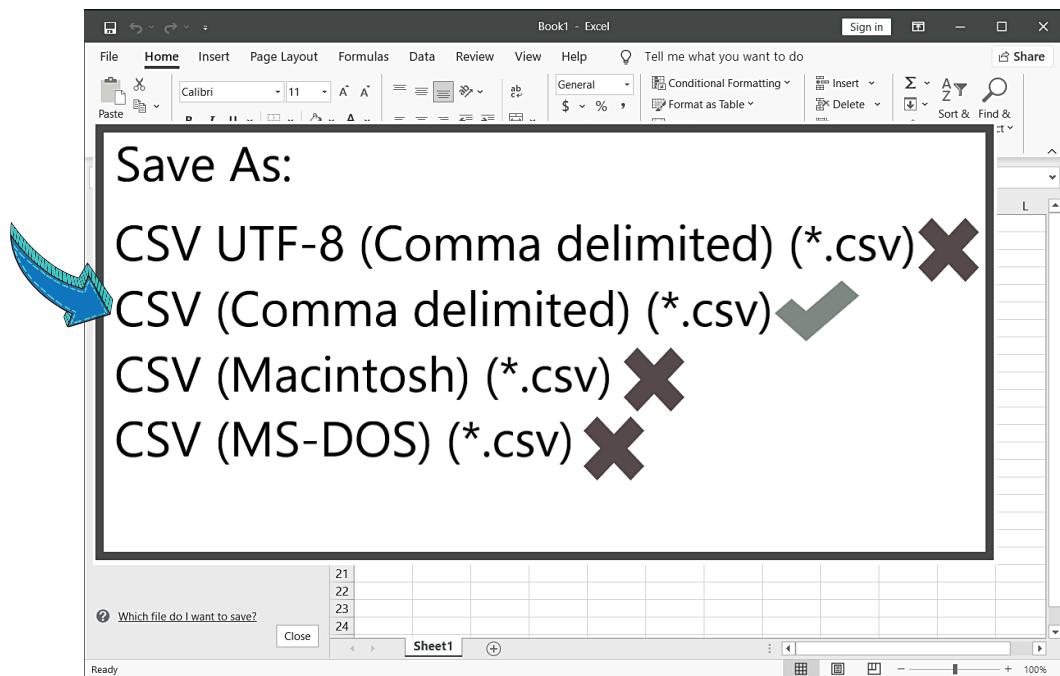


Figure 3

3 REQUIREMENTS FOR FILES

CONTINUED...

REQUIREMENTS FOR SPREADSHEET FILES FROM ECHELON AND AVIVA SOURCES

3.3 MAPPING OF DATABASE COLUMNS TO SPREADSHEET COLUMNS

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4 FEATURES

FEATURES OF THE SOFTWARE

The screenshot shows a software interface with a search bar at the top labeled 'Search...'. Below it is a search criteria panel with dropdowns for 'Pro.' (set to 'all') and 'Start Date' (set to 'equal'). The search panel also includes a date range selector for 'Aug 2021' and a calendar view for the month of August. The calendar highlights the 11th as the current date. Below the search panel is a claims grid. The grid has columns for 'Wk', 'Su', 'Mo', 'Tu', 'We', 'Th', 'Fr', 'Sa', and 'AB'. Rows represent dates from 30 to 10, then 11 to 14, 15 to 21, 22 to 28, and 29 to 31. Some rows have labels like 'EW' or 'EI' next to them. The bottom of the grid has icons for search, refresh, and other functions.

Figure 4

The screenshot shows a search pop-up window titled 'Search...'. It contains three search criteria: 'Good Record' set to 'equal' and 'yes', 'Incident Date' set to 'greater or equal' and '8/3/2021', and 'Incident Date' set to 'less or equal' and '8/31/2021'. There are 'Reset' and 'Find' buttons at the bottom.

Figure 5

4.1 SEARCHING – ADVANCED AND BASIC

To access advanced and basic search features choose from the icons in the bottom left corner of the search screen.

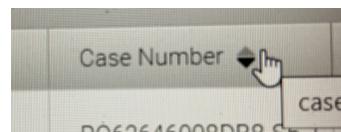


Advanced Search. You can add several fields to your search by clicking on the '+' button at the top of pop-up search box. You can also specify comparison conditions such as 'less or equal' and create ranges by using 'greater than' and 'less than'. See *Figure 4*.

Basic Search. A row of textboxes will appear at the top of the Claims grid. As you enter your search criteria in one or more of these textboxes, the grid will refresh with the matching records.

4.2 SORTING AND EXCLUDING INACCURATE RECORDS FROM SEARCH

Sorting. Click on the column headings to alternate displaying the list by ascending and descending order.



Excluding Inaccurate Records. To exclude inaccurate claim records (those that are not denied but have no claim amount: Paid Loss = 0 and Denied = 0), select 'Good Record' for your search criteria, and 'equal' and 'yes' for the other dropdowns. See *Figure 5*.

4 FEATURES CONTINUED....

FEATURES OF THE SOFTWARE

DELETE

Select the entry you would like to delete:

Delete

- OR -

UPLOAD

What is the source? AV

Start Date: 2021 Jan 01 End Date: 2021 Jan 01

Choose File No file chosen Files must have .csv extension.

Import Check for duplicates Clear duplicates from screen

Figure 6

4.3 UPLOADING SPREADSHEETS

To upload spreadsheets, click on the 'Remove or Upload Records from Database' button below the Claims grid. This will load the 'DELETE/UPLOAD' dialogue box shown in *Figure 6*.

NOTE: The spreadsheet data is usually cumulative, replacing previous records and adding new ones. In that case, you must delete the existing records first. See the 4.6 REMOVING GROUPS OF RECORDS section. You can check for duplicate records before you import the data: see the 4.4 CHECKING FOR DUPLICATES section.

STEP 1 – Ensure the spreadsheet is a .cvs file: see the *3.1 CONVERTING EXCEL FILES (.XLSX) TO COMMA DELIMITED (.CSV) FILES* section.

STEP 2 – Select the source ('AV' for Aviva or 'ECH' for Echelon) and the date range of the data.

STEP 3 – Choose the .cvs file to upload and click the 'Import' button.

4.4 CHECKING FOR DUPLICATES

To avoid uploading duplicate records, check for them in the file first by:

STEP 1 – Select the source ('AV' for Aviva or 'ECH' for Echelon) within the 'UPLOAD' section of the 'DELETE/UPLOAD' dialogue box. You do not need to enter a date range. See *Figure 6*.

STEP 2 – Click the 'Check for duplicates' button.

Any duplicate records will display at the bottom of the dialogue box, below the buttons.

The list of duplicate records remains at the bottom of the dialogue box until you click the 'Clear duplicates from screen' button.

4 FEATURES CONTINUED....

FEATURES OF THE SOFTWARE

4.5 ERROR CHECKING BEFORE UPLOAD

When you upload, the software will verify that the spreadsheet:

- has the .csv extension
- has the expected column titles based on the source (AV or ECH)

Any errors will display below the Claims grid. See *Figure 7*.

4.6 REMOVING GROUPS OF RECORDS

The spreadsheet data is usually cumulative, replacing and then adding to existing records. In that case, the existing records must be removed prior to upload.

To delete a group of records, select from the list of uploaded files in the dropdown box. See *Figure 8*. All records in the database from that file source will be removed.

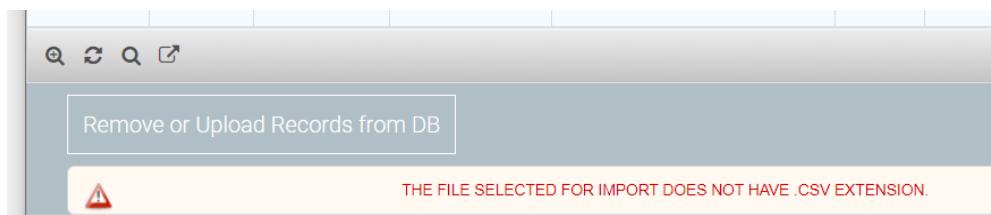


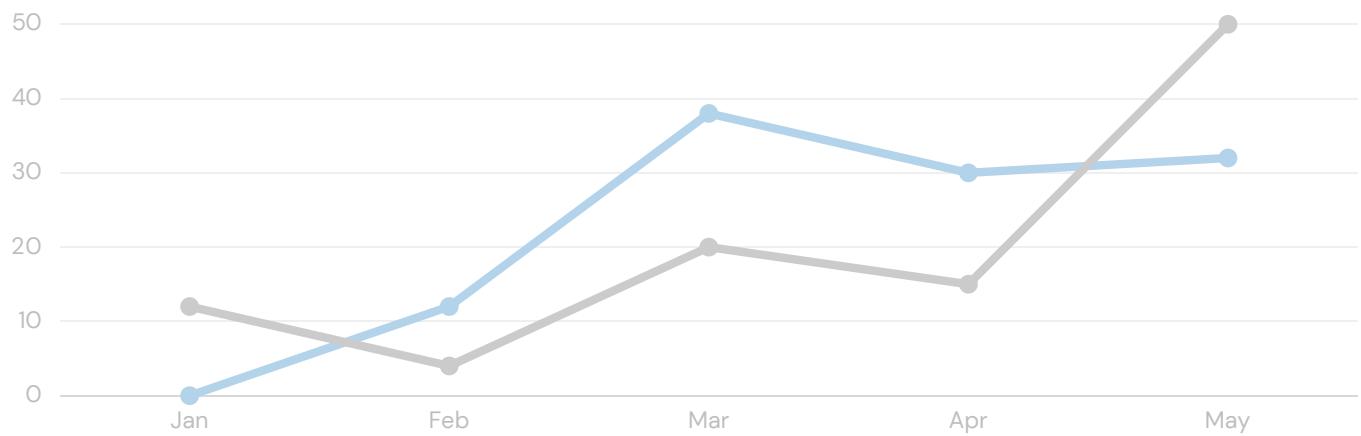
Figure 7

A screenshot of a "DELETE" feature interface. It shows a dropdown menu listing 51 uploaded files, starting with "1. File: '2011_2015_all.xlsx' 2011/01/01 to 2015/12/31 Source: ECH Uploaded: 2018-11-08 16:37:39.000". Below the dropdown is a "UPLOAD" button. Further down, there are fields for "What is the source?", date ranges ("Start Date: 2021 Jan 01 End Date: 2021 Jan 01"), and file selection ("Choose File No file chosen"). Buttons at the bottom include "Import", "Check for duplicates", and "Clear duplicates from screen".

Figure 8

4 FEATURES CONTINUED....

FEATURES OF THE SOFTWARE



4.7 EXPORTING REPORTS

Any results displayed in the Claims grid can be exported as an Excel file:

STEP 1 – Do a basic or advanced search (See *4.1 SEARCHING – ADVANCED AND BASIC*).

STEP 2 – Click the box and arrow icon at the bottom left corner of the grid.



This creates an Excel (.xlsx) file with the contents of the Claims grid.

5 TROUBLE SHOOTING



1

FRENCH CHARACTERS APPEAR INCORRECTLY

If French text has random characters where accented letters should be, the wrong type of .cvs file was uploaded; French characters will be encoded twice and display incorrectly.

To resolve this issue:

STEP 1 – Remove the affected group of records. See *4.1 REMOVING GROUPS OF RECORDS* section.

STEP 2 – Go to the original Excel spreadsheet and save the file as a CSV (Comma Delimited)(*.csv) file.

STEP 3 – Upload the spreadsheet again.

2

THE SOFTWARE IS LOOKING FOR A FIELD THAT DOESN'T EXIST FOR THAT SOURCE

Based on the source of the spreadsheet, the software searches for specific column headings before you upload. For example, for Aviva files, the software expects a 'Lender' column.

To resolve this issue, ensure that you have selected the correct source of the spreadsheet data in the DELETE/UPLOAD dialogue box ('AV' for Aviva or 'ECH' for Echelon).

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