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DXC Assure Claims & SubroPro Integration

User Guide

Release version 24.3 September 2024



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Initial Setup & Configuration

This section of the document talks about the initial setup and configuration steps.

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One-time settings involved for Assure Claims-SubroPro system integration includes the following steps:

- a) ThirdPartyInterfaceAPI must be hosted along with the Assure Claims application on IIS. This API can be found at: ~\Riskmaster\ThirdPartyInterfaceAPI.
- b) Corresponding to the ThirdPartyInterface API, Assure Claims ConnectionString must have a ThirdPartyDataSource node. Example:

<add name="ThirdPartyDataSource" connectionString="Driver={SQL Server};Server=databaseservername;Database=databasename;UID=uid;PWD=pwd;"providerName="S y tem.Data.SqlClient" />

Note

- This node needs to be updated in the Assure Claims ConnectionString (at all the places where the connection string is present in Assure Claims). Also, in the Client_Detail table of MTSecurity Database if Assure Claims is MT-Environment. (In short, at all the places where other nodes of connectionstring are present. This needs to be included as well.)
- Also, in the above node the ThirdPartyDatabase is a blank database with any name which needs to be created and same name is to be updated in the node. After the database creation following scripts must be manually executed: Create_thirdparty_schema_sql.sql – This script can be found at ~ Riskmaster\ThirdPartyInterfaceAPI\ThirdPartyDatabaseScripts

c) Next step would be to create Amali specific blank database and the following script must be executed: create_tables_subpro_sql.sql which can be found at:

~ Riskmaster\ThirdPartyInterfaceAPI\ThirdPartyDatabaseScripts

- d) Make sure that the SubroProRMAInterface.exe (a tools utility) is placed at ~WCFService/bin folder.
- e) Go to Utilities -> General System Parameter Screen
- f) Scroll down to third-party Interface Settings section.
- g) Select the Enable Amali Interface Checkbox highlighted below:

3rd Party Interface Settings			
Use TPA Import:		Use NMVTIS Reported Fields:	
Available TPA(s):			
Enable Amali Interface:			
Amali Add Claim URL:		Amali Token Url:	
Amali Reserve Type:		Amali User Name	
Amali Trans Type:		Amali User Password	
Amali Sub-Reserve Type:		Amali Bank Account:	Fresh DB

h) After clicking on the checkbox, the fields disabled above will get enabled and will become mandatory.

3rd Party Interface Settings			
Use TPA Import:		Use NMVTIS Reported Fields:	
Available TPA(s):			
Enable Amali Interface:			
Amali Add Claim URL: 1		Amali Token Url: 2	
Amali Reserve Type:		Amali User Name 3	
Amali Trans Type:		Amali User Password 4	
Amali Sub-Reserve Type:		Amali Bank Account:	Fresh DB

Note

- Fields 1,2,3,4 marked in red above i.e., Web API URL with username and password for authentication are required from Amali SubroPro side before any further setup is done as they are mandatory in Assure Claims.
- i) Click on save button after filling all the mandatory fields.

Note

DXC Assure Claims Authentication token and rmA Add Party and Add Payment URL need to be sent to Amali SubroPro for Amali system requests to get validated in Assure Claims system.

Example of rmA Add party URL: <u>http://servername/rmA/Amali/AddParty</u> **Example of rmA Add Payment URL:** http://servername//rmA/Amali/AddPayment

To generate Authentication Token in Assure Claims follow the steps below:

j) Go to Utilities -> Tokens under System Parameters

Utilities / Tokens						5
Token Data						
_						
+						
	User Name	Name	Life Time	Origin	Token	Active

k) Click on + icon to create a new Token.

Utilities / Tokens					5 ×
Token Data					
				×	
+ 	Note :User must be a valid sms user.				•
	User Name •	Password •	Name *		
	Life Time	Days	Hours		
	Minutes	Origin •			

 Provide all the mandatory field values in the grid above. Enter "riskmaster.com" in Origin field. Field Name should contain a unique name for every user. Click on the Save button.

Utilities / Tokens	Utilities / Tokens							
Token Data								
+								
1	User Name	Name	Life Time	Origin	Token	Active		
/ 💼 🛡	test	testtoken1	Infinite	riskmaster.com	1ec4163b94294df29957cff82	true		

Copy the value in "**Token**" field which is generated and send to Amali SubroPro.

- m) Next step would be to associate a DSN to Amali specific database. This is done from the SMS Screen.
 Go to Security -> Security Management System (SMS). Select the current DSN. On the right side a new toolbar button will be seen.
 - 1. Click on the highlighted button and add third party Amali Database information which was created in Step "**c**".

Security Management System			5
Security Management System			
Image: Construction of the second	Data Source Settings Data Source Settings System Login Name	System Password	Module Access Security Enabled
- O RMACDR_POLICY_172_EX - O RMACDR_POLICY_AV	Document Path for this Data So	urce	License Information
ORMACDR_Policy_new ORMADemo ORMAMH_QA_Email ORMAORADB ORMAUXACOFF_UW ORMDB_143_ISO_AV Ormdbmk2	Path/Data Source	er	# Workstations : -1

2. Select the Client Type

Add New Data Source		×
Connection Information	Client Type * Amali	▼
Driver_Selection		
Preparing for Validation.		
Validation Results		
Verifying_Security_Code		
Einalizing	×	>

3. Select the Driver.

Add New Data Source			×				
Connection Information	Select the Driver for the Databas	Select the Driver for the Database you want to connect to					
	Name.	Version	Company				
Driver Selection	SQL Server	10.0.15063.0 (WinBuild.160101.0800)	Microsoft Corporation				
Preparing for Validation.	OSQL Server Native Client 11.0	2011.0110.7462.06 ((SQL11_PCU_Main).180105-2156)	Microsoft Corporation				
	OSQL Server Native Client RDA 11.0	2011.0110.5069.066 ((SQL11_OLEDB_AAD).160321-0812)	Microsoft Corporation				
Validation Vesaties	OODBC Driver 13 for SQL	2017.0140.1000.169 ((SQLServer).170822-2340)	Microsoft Corporation				
Verifying Security Code							
Finalizing			« »				

4. Provide Third Party Database specific to the client selected.

Add New Data Source	*
Connection Information	Please enter necessary data to connect to database:
Driver Selection	DXCINDAI690359 Database Name. *
Preparing for Validation.	AmaliDB Login User Name *
<u>Validation Results</u>	sa Login Password: *
Verifying_Security_Code	
Einalizing	« »

5. Provide the authentication key.

Add New Data Source	*
Connection Information	Please Enter Necessary Data to Connect to Database:
Driver Selection	Please enter unique name for this database connection: * test2
Preparing for Validation.	Enter the code provided by the product support to activate licenses: *
<u>Validation Results</u>	
Verifying Security_Code	
Einalizing	

n) Next step would be to do the Third-party Mapping of codes. This step is mandatory otherwise data will not be pushed to SubroPro system because of missing code mappings. Go to Utilities > Third Party Setup under Manager section. If the Third-Party Setup Node is not visible, then, make sure "Use TPA import" checkbox is checked in Utilities > General System Parameter under third-party Interface settings.

Utilities / Third Party Setup	5
Add Third Party Interface RMA-Third Party Code Mapping	
Available Third Party Interface(s)	
Third Party Interface Name	
Third Party Interface Name	

o) Enter Third party name in the textbox "**Third Party Interface Name**" above. Click on "+" icon and it will show a row created in the grid below. Reload the screen.

Add Third Party	Add Third Party Interface RMA-Third Party Code Mapping							
Available Third	Available Third Party Interface(s)							
Third Party Interfa	ce Name							
	Third Party Interface Name							
	Amali Subropro	Ð						

- p) Click on '+' button present in the grid above. The following screen will open. Map the Third-party code table with rmA code tables. Following are the pre-defined code tables for Amali SubroPro in rmA system for which the code mapping is required:
 - > SUBPRO_RESERVE
 - > SUBPRO_STATES
 - SUBPRO_PHONECODE
 - SUBPRO_CLAIM_TYPE
 - SUBPRO_LOSSCODE

- > SUBPRO_LOB
- SUBPRO_SUFFIX
- ➢ UBPRO PREFIX
- SUBPRO_PARTY

Note

> These above code tables would be automatically created in Assure Claims system when Amali setting is turned ON in General System Parameter screen.

In addition to above tables, there are two more SubroPro tables which are SUBPRO_VEH_MAKE and SUBPRO_VEH_MODEL and there are no corresponding rmA code tables for the same. Hence no third-party mapping is required for them. The only requirement is to have unique IDS generated for each value in Assure Claims for them and stored via table maintenance as description.

Third Party Interface Table Mapping						
Amali Subropro Table Name	AB Overtim 🔻					
Riskmaster Table Name	AB Overtim 🔻					
Third Party Table Name	RMA Table Name					
SUBPRO_CLAIM_TYPE	Claim Type					
SUBPRO_LOB	Line Of Business					
SUBPRO_PARTY	Person Inv Type					
SUBPRO_PHONECODE	PHONES_CODES					
SUBPRO_PREFIX	Entity Prefix					
SUBPRO_RESERVE	Reserve Type					
SUBPRO_STATES	STATES					
SUBPRO_SUFFIX	Entity Suffix					
SUBPRO_LOSSCODE	Cause					

q) Now click on second tab **RMA-Third Party Code Mapping** and following screen will open.

Utilities / Third Party Setup		٥						
Add Third Party Interface RMA-Third Party Code Mapping								
Third Party Interface Code Mapping								
Third Party Interface Name	Amali Subropro 🔻							
Third Party Interface Code Mapping								
Select Third Party Code Table	AB Overtime Hours Per]						
Third Party Codes	aaa - aaa 🔹 🔻]						
Riskmaster Codes	- •]						
Note: If any Third Party Code is not mapped with Riskmaster Code then Default value of Risk	Note: If any Third Party Code is not mapped with Riskmaster Code then Default value of Riskmaster Code will be used.							
Third Party Codes		Riskmaster Codes						

Make sure to select the correct name from Third Party Interface Name dropdown. In the code mapping section first select the "Third Party code table" from dropdown.

 r) Select each Third-party code table one by one and its corresponding Third-Party Code and RISKMASTER Codes. Click on '+' to save mapping. Mapping will be listed in the grid as follows:

Third Party Inter	face Code Mapping		
Select Third Party	Code Table	SUBPRO_STATES •	
Third Party Codes		29 - ND 🔻	
Riskmaster Codes		Vabama - AL 🔻	
Note: If any Third I	Party Code is not mapped with Riskmaster Code then Default value of Riskmaste	r Code will be used.	
	Third Party Codes	F	Riskmaster Codes
	FL Florida		FL 10
	IA Iowa		IA 13
	ID Idaho		ID 14
	IL Illinois		IL 15
	IN Indiana		IN 16
	ME Maine		ME 22
	MN Minnesota		MN 24
	MS Mississippi		MS 26
	MT Montana		MT 27

Note

- There can be multiple RISKMASTER Codes for which the user might not find the appropriate pre-generated Amali SubroPro codes or vice versa. All these code tables are user defined in Assure Claims
- In this scenario, for each RISKMASTER code a corresponding code must be generated first in Amali SubroPro system and then same must be added in rmA through 'Table Maintenance' under Maintenance section for the defined Third-Party Code table.

Make sure to add the Amali SubroPro generated system code for corresponding RISKMASTER code as description value (highlighted in red below) and not code value (highlighted in red below) since their code exceeds length 25 which is the maximum limit for code in rmA. The code value to be given can be the corresponding code of rmA table.

Table Maintenance			ঠ
	Enter Code Details	×	3 4 User Code Tables
STD Disability Type	₿₿		
Stop Check Reason Code	Code S	Description A	V Start Date
SUBPRO_CLAIM_TYPE	Parent Code	Industry Standard	
SUBPRO_LOB /	Line Of Business	Effective Date Trigger Please Select	
SUBPRO_PARTY	Effective Start Date	Effective End Date	
SUBPRO_PHONECODE	Effective For	Language	

For SubroPro tables SUBPRO_VEH_MAKE and SUBPRO_VEH_MODEL, there are no corresponding rmA code tables for the same. Hence, no third-party mapping is required for them. The only requirement is to have unique IDS generated for each value in Assure Claims for them and stored via table maintenance as description.



Pushing Data to Amali SubroPro System

This section of the document discussed how to push data to Amali SubroPro system.

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Once the initial setup is completed fully, there are two ways to push the data to SubroPro System. The two methods are discussed as follows:

1. Online Mode via Reserves screen of Assure Claims UX

In this mode claims can be sent one by one. That is, only claim will be sent at a time.

Note

- In the scenario, if more than one Reserves have Subro Potential on a particular claim, then, make sure to send the claim only through OFFLINE mode, i.e., using task manager exe. Do not push the reserve one by one through online mode. This is because Amali API validates the claim number and error will occur if it gets repeated.
- a) Claim for which the Subrogation is required, go to Claims > Financial and Reserves screen.
- b) Subrogation can only be done for Reserves with parent **Indemnity** and on which at least one transaction has been made.
- c) A checkbox will be displayed in a grid under Amali Export column corresponding do the reserves satisfying point "**b**". For all the reserves not satisfying the point (**b**) in the reserve listing grid will not have Amali checkbox visible. To indicate Subrogation potential on the Reserve, select the checkbox as highlighted below.

Γ	Reserves (General Claim [GC_123 * test 2 * test])									
	+₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽									
	~	LSS Export	Amali Export	Reserve Sub Type	Reserve Type	Balance	Paid	Collection	Incurred	Benefit Review Date
	×				Indemnity	\$700.00	\$800.00	\$0.00	\$1,500.00	
1	~				C Compensation	\$50.00	\$0.00	\$0.00	\$50.00	

d) Now select the row and click on "**A**" (highlighted below) to push the reserve to Amali SubroPro system

[
	~	LSS Export	Amali Export	Reserve Sub Type ~	Reserve Type	Balance	Paid ~	Collection ~	Incurred ~	Benefit Review Date
	~				IIndemnity	\$700.00	\$800.00	\$0.00	\$1,500.00	^
	× .				C Compensation	\$50.00	\$0.00	\$0.00	\$50.00	

e) If there are no validation errors while sending the data to SubroPro system, then, the following display message will be logged.

[Res +	V Successful	ly exported data to	Amali Subro System.						
	~	LSS Export	Amali Export 🎽	Reserve Sub Type	Reserve Type	Balance	Paid	Collection	Incurred	Benefit Review Date
	~				Indemnity	\$734.00	\$500.00	\$0.00	\$1,234.00	

In addition to the above message Amali History table will be updated with the information in the database and log files will be created under Assure Claims API > uxlogs with name Amali.log.

Also, the checkbox will be disabled once the record is successfully pushed to Amali SubroPro system and if user tries to re-send the row, then, an error will be displayed.

[Res Image: Strange of the selected record has already been sent to Amali Subropro. Image: Strange of the selected record has already been sent to Amali Subropro.									
	~	LSS Export	Amali Export	Reserve Sub Type	Reserve Type	Balance ~	Paid ~	Collection ~	Incurred ~	Benefit Review Date
	~				IIndemnity	\$700.00	\$800.00	\$0.00	\$1,500.00	

Few validations have been implemented before the data is sent to SubroPro. For e.g., any Third
 Party Code mapping is missing for the corresponding claims data sent then error will be displayed.



Also, for all the persons involved in the claim with subrogation potential the **Date of Birth** is mandatory. If any DOB is missing, then error will be displayed.

Re +	Res U Birth Date is not provided for the person Involved having last name(s) .: Emp_001 qa123									
~	LSS Ex	port ~	Amali Export	Reserve Sub Type	Reserve Type	Balance	Paid	Collection	Incurred	Benefit Review Date
~										

2. Offline Mode via Task Manager

In this mode, multiple claims with subrogation potential can be sent in batch to Amali SubroPro system.

- a. To indicate Subrogation Potential, the steps remain same as described in above section, i.e., to select the Amali export checkbox in reserve listing grid under Claims > Financial and Reserves Screen.
- b. To execute Batch job, go to Utilities > View Scheduled Tasks > Select Amali SubroPro task.



Note

View Schedule Tasks drop down will not have Amali SubroPro value unless Amali setting is enabled in General System Parameter Settings in Utilities. c. On the next screen provide Data and Time for running the job.

Utilities / View Scheduled Tasks	
Schedule a Task	
88	
Task Type:	Amali Subropro
Task Name:	Amali Subropro
BubTask Name:	None
Schedule Type:	OneTime
Send Email Notification F	Parameter:
Send Email Notification	
Enter the Date and Time	you would like to Run the Task on:
	-
Date:*	—
Time: * (Coordinated Universal Time)	

d. Click on Save button. The scheduled job will be visible in View scheduled tasks screen.

Utilities / View Scheduled Tasks									
Task List	Task List								
¢+									
	Task Name	Schedule Type	Next Run Date/Time						
\bigcirc	Amali Subropro	OneTime	10/18/2018 10:22 PM						

- e. When the job executes, it will complete with either of the below three Job states:
 - Completed If the data is successfully sent to Amali SubroPro system, then this status will appear.
 - Completed with Validation Errors If any validations are thrown from Amali System, then, this status will appear.
 - Completed with Errors If any error occurs in Assure Claims before sending the data to SubroPro, then, this status will appear.
- f. Complete description of errors and process will be logged in job files that can be found in zip folder attached on TM Jobs View Screen.

Utilities / TM Jobs View							
Running Jobs							
$\bigcirc \diamondsuit$							
Job Name	Descripti	on Job S	State	Start Date/Tim	e	End Date/	Time
	•						
Г	TM Jaha View						
L	TIVI JODS VIEW						
Archived Jobs							
1 - 25 of 35 record	ds			I	Page 1 of	2 First Previous I	Vext Last
Amali Subropro	Amali Subropro	Completed	ΔM	ΔM		10g	
A mark Codemanne	A mark Colonaana	Completed With	10/17/2018 11:0	310/17/2018 11:08	3	(Pro-	
Amaii Subropro	Amaii Subropro	Error	AM	AM		ug	
Amali Subropro	Amali Subropro	Completed	10/17/2018 10:4	1 10/17/2018 10:41	-	lia	
			AM	AM			
Amali Subropro	Amali Subropro	Completed With	10/17/2018 10:3	3 10/17/2018 10:38	3	69	
		Validation Errors	AM	AM		-tar	

In the zip folder highlighted above a complete log file will be present indicating the description of process executed.

g. User can view the complete process by clicking on the Job State as well. A screen will open.



All the validations that can occur at Assure Claims level which are described in online section will be captured in these logs.



Verifying the Subrogation Recovered & Party from SubroPro

This section of the document discusses steps to verify the subrogation recovered and party from SubroPro.

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When the Subrogation is completed at Amali SubroPro, then, subrogation data along with party information is sent back to rmA system. In order to view the Subrogation data in Assure Claims, follow the steps:

 Go to Assure Claims > Claims > Financial and Reserves Screen for the claim on which Subrogation is expected. A Subrogation Recovery Reserve will be created, and corresponding collection made for the Subrogation Amount sent. List of transactions done on the reserve can be viewed by clicking on highlighted icon in red below.

Rese +	Reserves (General Claim [GCBItest8000004 * test 2 * at123]) + & [] [] [] [] [] [] [] [] [] [] [] [] []							
~	LSS Export	Amali Export	Reserve Sub Type	Reserve Type ~	Balance	Paid ~	Collection ~	Incurred
~				Subrogation EC60DEA7-C···	\$0.00	\$0.00	<mark>81,750.00</mark>	\$1,750.00
~				C Compensation	\$600.00	\$600.00	\$0.00	\$1,200.00

Transaction history of the Recovery Reserve can be viewed by clicking on highlighted icon in above screen.

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Trans	Transaction History (General Claims [GCBItest8000004*test 2*at123])									
0										
~	Control # ~	Split Amount ~	Check # ~	Trans Date	Type ~	Cleared?	Void?			
~	0000072	(\$120.00)	123	10/22/2018	Collection	No	No			
~	0000063	(\$1,000.00)	0	10/17/2018	Collection	No	No			

Transaction	Transactions of the selected reserve row X									×	
Payee Name	Check Number	Date of Check	Туре	Transaction type	Amount	Status	Void	Stop Pay	Stop Pay Status	Cleared	Control Number
		10/17/2018	Collection	WC Record Copy Services	(\$100.00)		No	No		No	0000062
test emp 1,		10/17/2018	Collection	WC Record Copy Services	(\$1,000.00)		No	No		No	0000063

Reserve history of recovery reserve can be viewed by clicking on highlighted icon in above screen.

Rese	Reserves for General Claim [GCBItest8000004 * test 2 * at123]								
~	Reserve Date	Reserve Amount	Status	User	Change Amount 👻 💻				
1	10/17/2018	\$1,800.00	Open	test test	\$50.00				
~	10/17/2018	\$1,750.00	Open	test test	\$50.00				
~	10/17/2018	\$1,700.00	Open	test test	\$600.00				
1	10/17/2018	\$1,100.00	Open	test test	\$1,000.00				
1	10/17/2018	\$100.00	Open	test test	\$100.00				

For the party sent by SubroPro Amali, the record will be attached as a person involved of Other type and can be viewed from Claims screen.

Oth	Other Person Involved [A_testing_001 * yareni romero]								
E									
	Last Name Middle Name								
	romero	yareni	e						
	Initials	Also Known as	Address 1	Address 2					
	r		9999						
	Address 3	Address 4	City	State					
5			Maybrook						
	County	EMail Type	EMail	Expiration Da					
				MM/dd/yyyy					
	Prefix	Suffix (Legal)	NAICS Code						



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