

## IPD Ultera 9 Release Announcement

Image Process Design, LLC (IPD), a leading provider of process automation solutions, announce the release of Ultera 9, available on-cloud or on premise. Ultera 9 builds upon IPD's 26 years of experience serving leading insurance and financial service organizations with solutions that transform how work is accomplished through process automation, content and data aggregation and an enhanced end user experience. Ultera 9 accelerates time to value by utilizing proven industry practices, domain expertise and the intelligent application of proven software and automation available through IPD and IBM.

- **Save Searches** – Ultera 9 enables business analysts to easily search content, tasks, cases and associated history for each role. More detailed searches may be configured and saved for repeat use necessary to support daily work patterns and information needs. Save Searches may be highly configured to serve specific individual needs or shared among user communities and can be easily executed from the Ultera home screen.
- **Case Ownership** – Often, business needs require the participation of a variety of team members serving in a variety of roles with differing responsibilities with each “owning” a portion of the process or case. Ultera 9 helps facilitate increased collaboration and accountability among stakeholders resulting in greater communication, better decisions and improved efficiency.
- **Case Reassignment** – Changing business needs and priorities often require the reassignment of resources. Ultera 9 allows end users to quickly identify all cases assigned to a specific owner and to easily reassign those cases to a new owner. As part of the reassignment process, Ultera 9 also supports the reassignment of all associated tasks. All reassignments are tracked in history and readily available for audit purposes.
- **Ultera 9 Queues** – The application of structured workflow helps to increase process consistency and control. However, for some processes, structured workflow may constrain and in some cases, prohibit end users from taking action or making the best decision. Ultera 9 queues structures empower knowledge workers to make routing decisions based on their experience, rather than being constrained by an underlying structured workflow. By enabling both methods – structured workflow and ad-hoc routing, Ultera 9 provides businesses with the most flexibility based on their business requirements. Ultera 9 work queues are controlled by a permission model that only lets an authorized user make routing decisions.
- **Mass Routing** – Fluctuating workloads and workforce availability may create work backlogs necessitating the reassignment of work to new work queues. Ultera 9 enables authorized end users the means to select and route work to new work queues based on a variety of selection criteria. Access to the Mass Routing feature can be restricted by User Role.
- **History Searches** – Complex work processes involve many participants, decisions and the exchange of volumes of data. Over time, even the simplest of processes involve many events. Ultera 9 offers an extensive search capability that enables end users an efficient means to mine relevant, historical data. End users responsible for long-running cases can use Ultera 9 to search historical data to answer critical questions like, “When did the Attending Physician Statements arrive?” or “How many times did the Rehabilitation Specialists access a case?”

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- **Case Notes & Journal** – Shared access to stakeholder notes, decisions and recommendations are essential to coordinated, efficient case management. Ultera 9 offers a comprehensive notes capability that allows all decisions to be captured and retained. Access to case notes are secure, limiting access to those possessing permission to add and/or view existing case notes.

Core notes features:

- Committed notes become a permanent artifact of the case
  - Draft notes can be saved with the case but are not committed until directed by an end user
  - Search capabilities that can span across all notes for a case
  - Configurable Note Categories and Note Types can be mapped to various business areas
- **Telephone Task Worksheet** – Phone conversations and interactions commonly contain the exchange of essential case information, including additional detail and action items. The Telephone Task Worksheet accelerates the collection of meaningful information during the call, tracks the interaction and then assigns any required action items. Because the interaction is recorded in a structured format, data is readily available for reporting and business rules.
  - **Request Response Worksheet** – The exchange of information among process stakeholders is often central to completing a task or progressing a work process or case. Ultera 9 contains a request response worksheet to inform another party, raise questions, capture requested information and reply with additional information, as needs dictate. Outstanding requests are tracked helping to ensure timely follow up. The resulting history of exchanged information is maintained for reference.
  - **Archive Agent** - For both legal and historical purposes, it is essential that case information, including worksheets, are stored and archived with the case. The Ultera 9 Archive Agent can be configured to archive both case and task worksheets, including Telephone Task or Request-Response, once the case is complete or if the contents of a case need to be printed. The Archive Agent captures the current state of the worksheet, transforms it into a printable format, stores it as a permanent artifact of the case and then automatically indexes the new document with data from the associated case or task.

## Ultera 9 Optional Module

- **Ultera Dashboard Module**– IPD Ultera 9 may be extended through the use of an optional Dashboard Module. The Ultera Dashboard Module supports the graphical presentation of essential information to inform and initiate action. End users may personalize a dashboard to support specific role, process and personal preferences. A series of powerful tools, including gauges, pie and bar charts, and data grids are available to present a variety of information, including assigned work and daily performance. Additional information describing the Ultera 9 Dashboard module is available at: <https://www.ipdsolution.com>.