What's New, What's Next in Insurable Risk



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What's New | Key Enhancements & Improvements

01 AI: AL Claim Predict & New Agents

02 Renewal Values Collection v. 2 for RK RMIS

03 Health & Safety Updates



04 ClearSight Advanced Rules Engine GA

05 ClearSight – Claims Processing Improvements

06 Document Image Annotations in Claims Enterprise

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What's New

AI: Standard Insurable Risk Agents in RK RMIS

Platform

- Knowledge Agent
- Criteria Analysis and Alert
- File Translator
- File Summarization*
- Related Record Search
- Content Assessment
- Form to Record Mapping

7 GRC Agents

Insurable Risk

- Intake Agent
- Claims Risk Signal Agent
- Job Hazard Analysis Form Processer
- Claim Audit Agent
- Claim Assessment Agent
- Email to Claim Intake

Healthcare

- Patient Event Assessment Agent

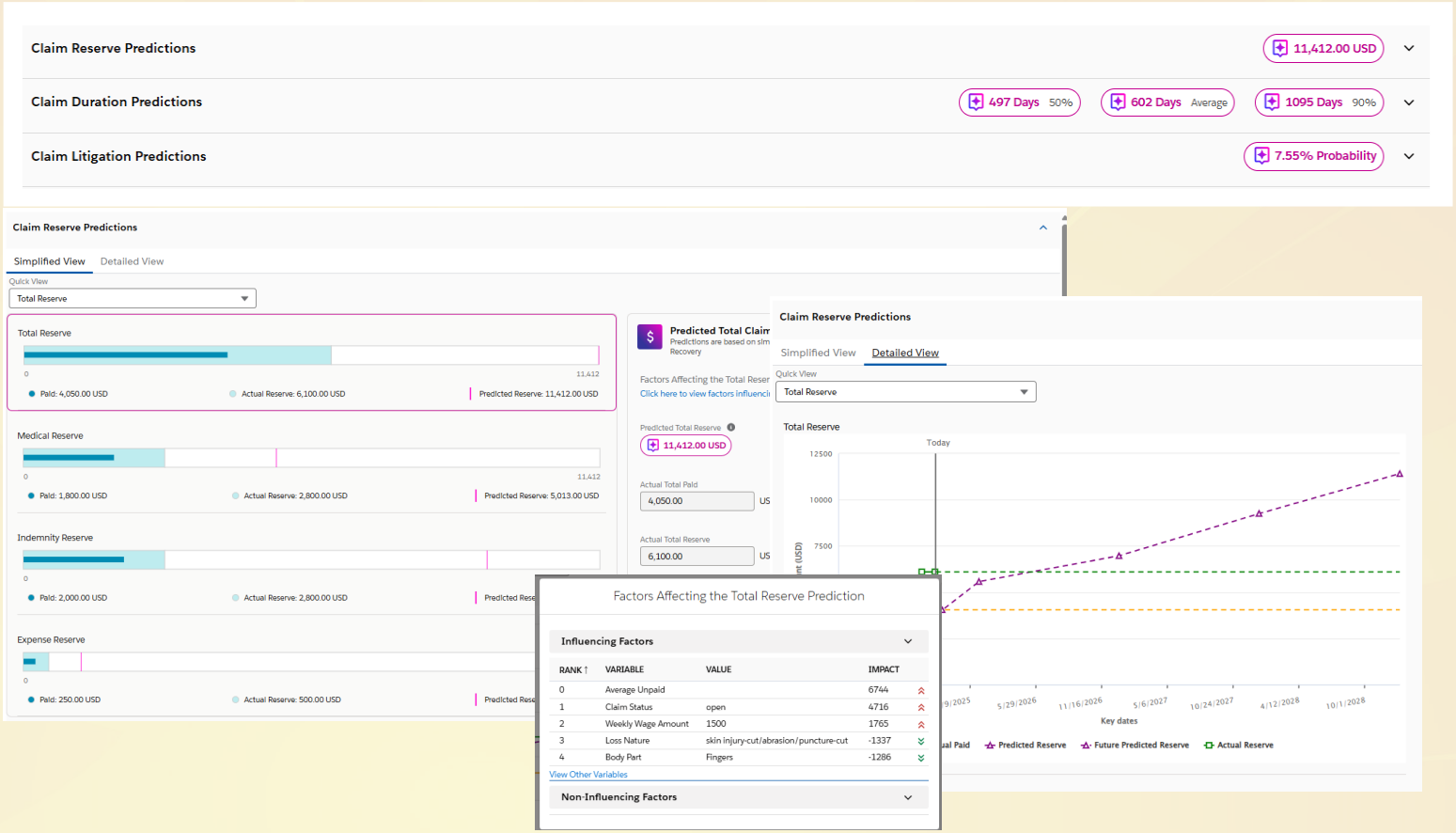
* Also available in ClearSight

AI Agents Built Into the Platform – Working Together for Efficiency and Automation

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What's New

AI: Claim Predict – AL Now Available in ClearSight



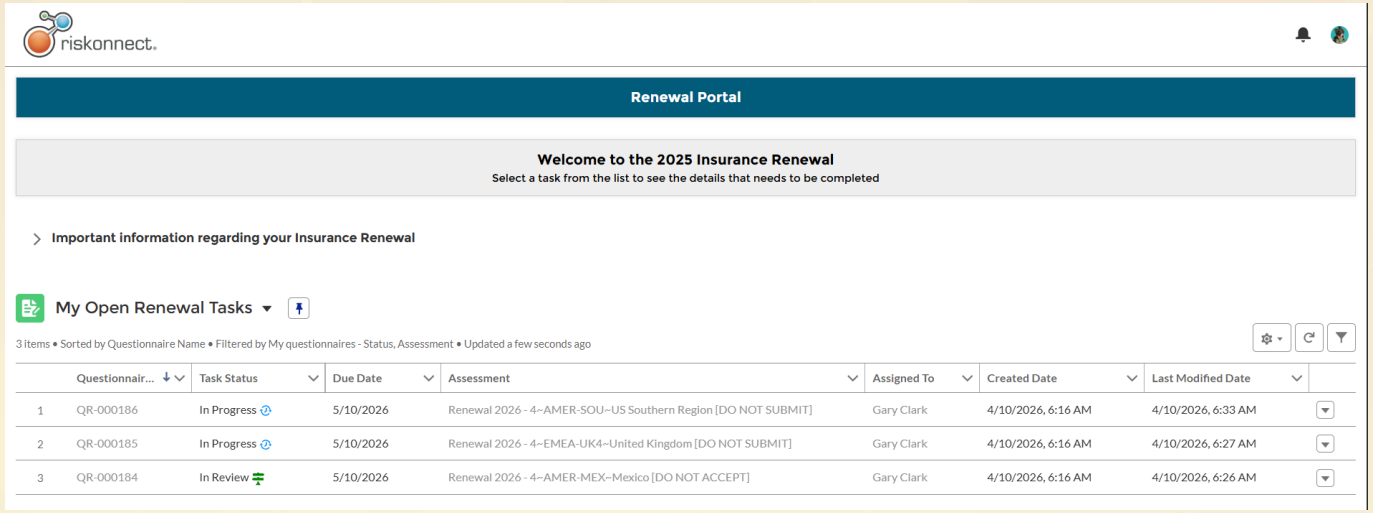
Prediction Indicators Leading to Early Identification, Proper Intervention and Improving Outcomes

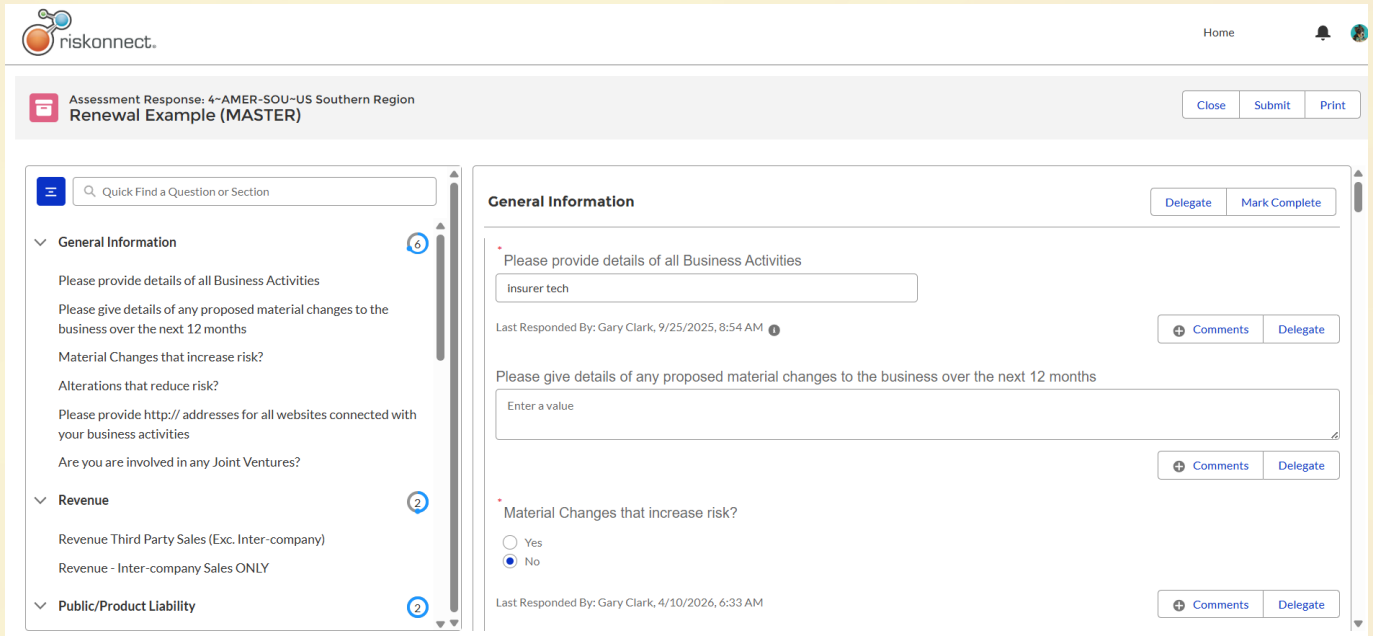
Reminder: WC Claim Predict now available for ClearSight, RK RMIS and Claims Enterprise
AL Coming Soon for RK RMIS and Claims Enterprise

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What's New

Renewal Values Collection v.2 for RK RMIS





Configure Simply Once, Collect Accurately Everywhere — Driving Data Quality at Scale

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What's New

Health & Safety Update for RK RMIS

Health & Safety

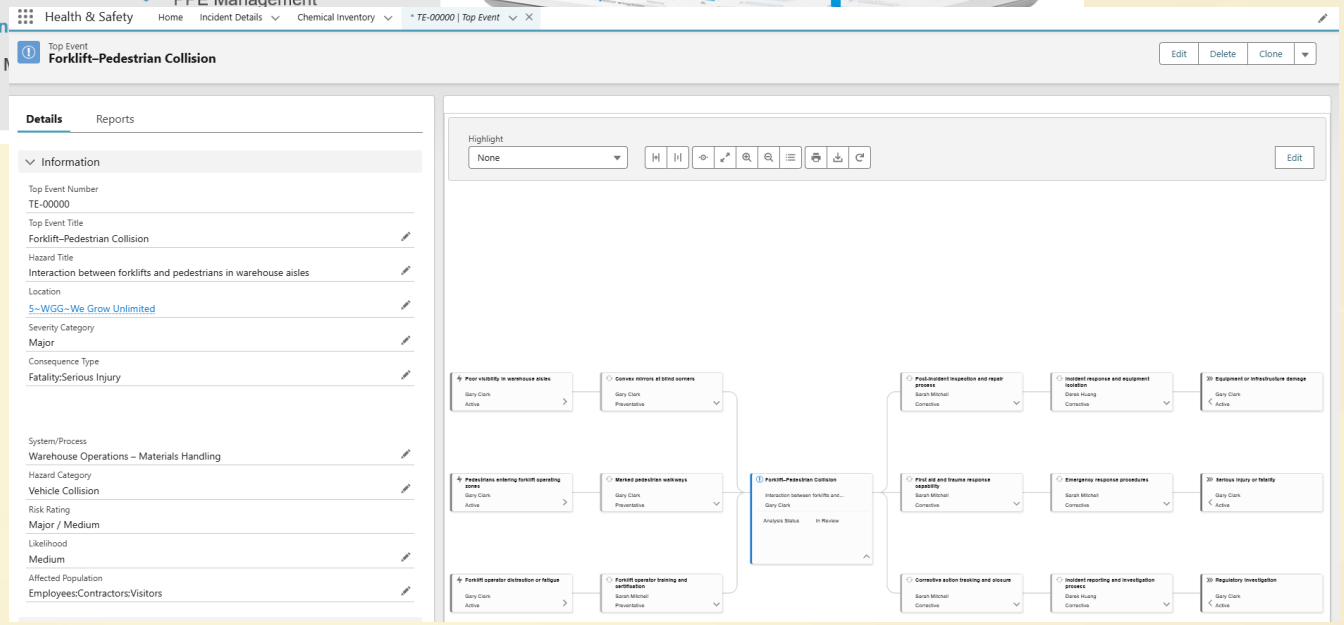
Spot early warning signs, monitor trends, and manage incidents that turn into claims, all from one place.

Proactively manage safety programs, track outstanding audits, and correct risks quickly.

Tap into preloaded protocols and automatic data transfers to regulators for worry-free compliance.

- **Audit & Inspection**
- CAPA Management
- Chemical Management
- Contractor Management
- Equipment Safety
- **Hazard Risk Man**
- Intake & Incident M
- Investigation
- **Job Safety Analysis**
- Near-Miss & Safety Observations
- OSHA Compliance
- Permit To Work
- PPE Management



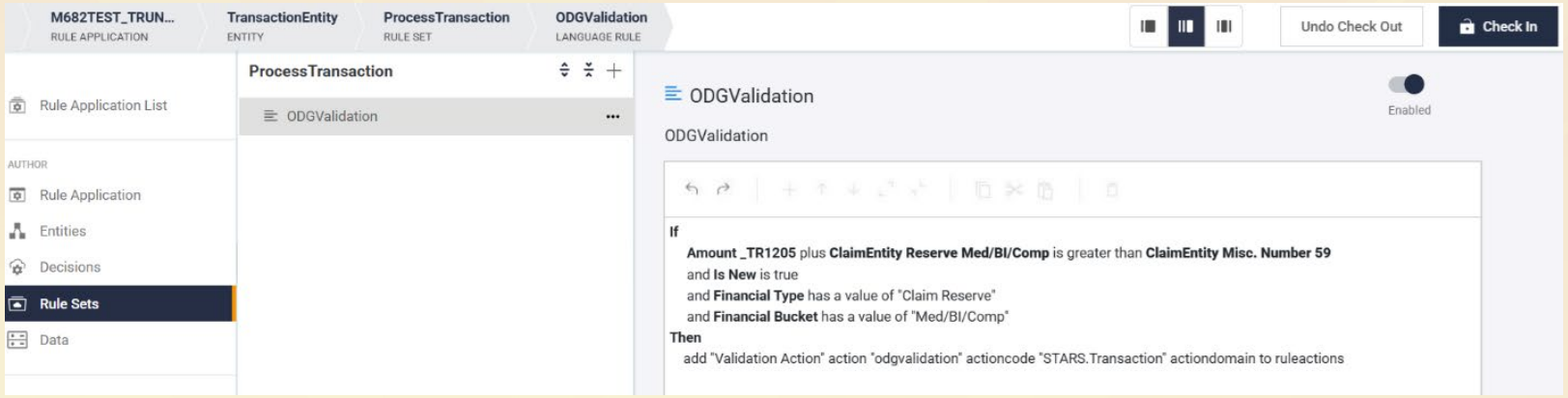


Standardized Content and Features for a Robust H&S System Integrated with RMIS Capabilities

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What's New

Advanced Rules Engine for ClearSight - GA



Element	Value
Trigger	New transaction only (`Is New = true`)
Financial Type	`Claim Reserve`
Financial Bucket	`Med/BI/Comp`
Amount Field	`Amount _TR1205` — New reserve amount being entered
Existing Reserve	`ClaimEntity Reserve Med/BI/Comp` — Current outstanding reserve on the claim
ODG Limit	`ClaimEntity Misc. Number 59` — ODG-recommended maximum reserve
Validation Condition	Amount + Existing Reserve > ODG Limit
Action Type	`Validation Action` — Hard stop, blocks the save

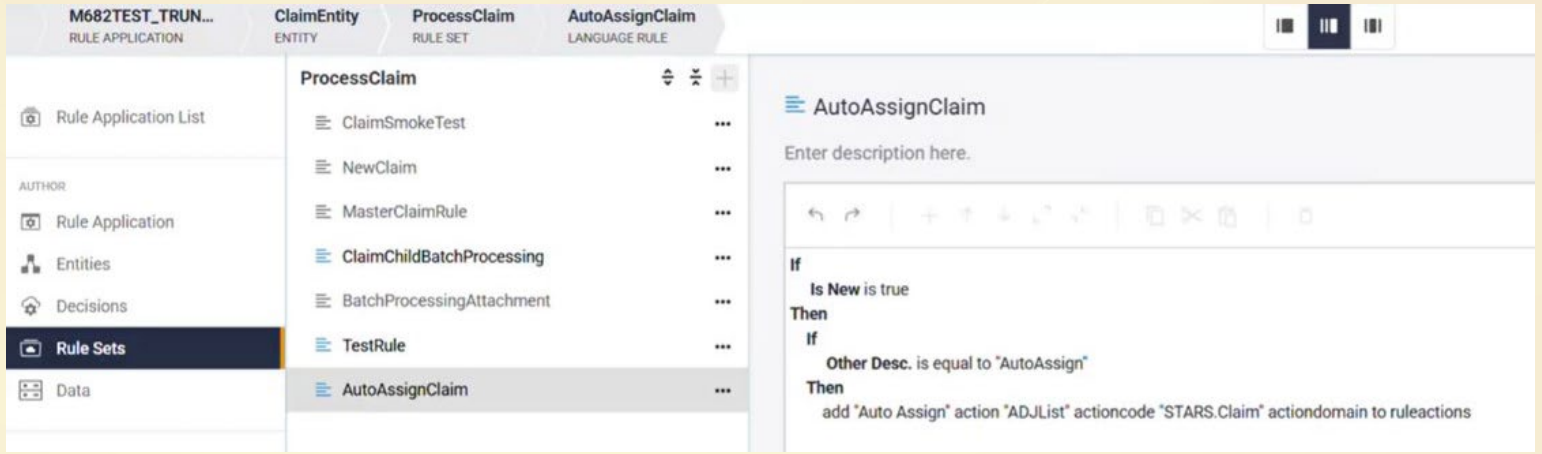
Automate Complex Decisions with Powerful, Flexible Rules — No Coding Required

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What's New

ClearSight – Claims Processing Improvements

Advanced Adjuster Assignment



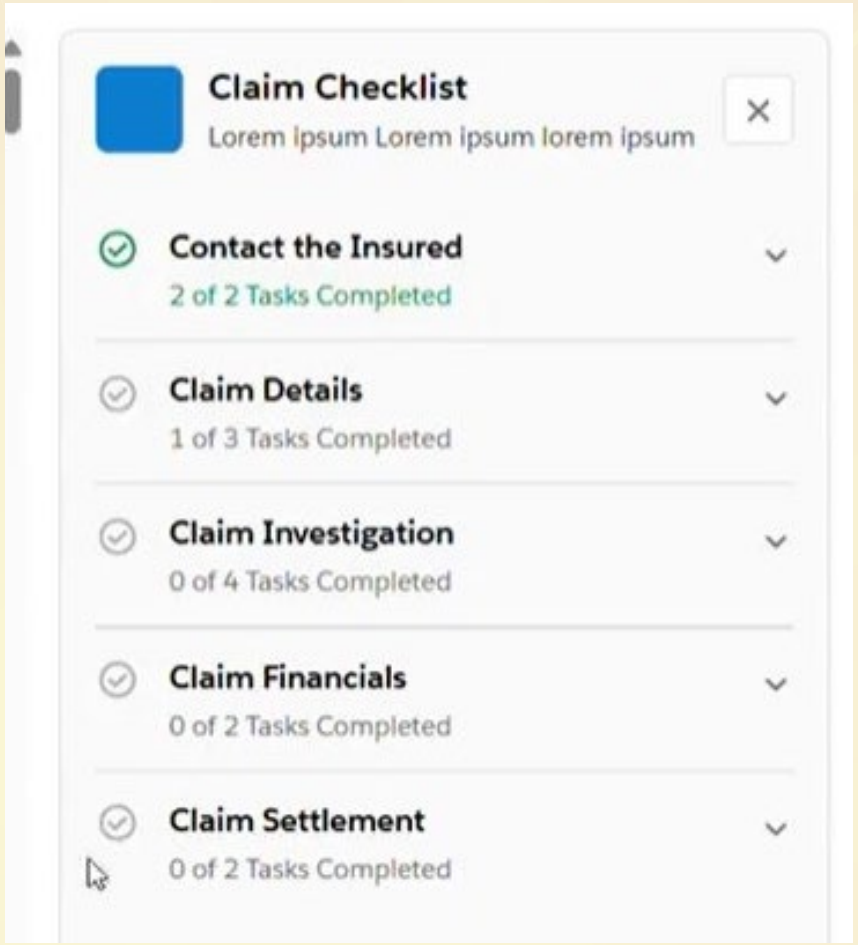
Cleaner Data, Consistent Workflows, Smarter Risk Flags, and the Right Adjuster.

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What's New

ClearSight – Claims Processing Improvements

Claim Checklist



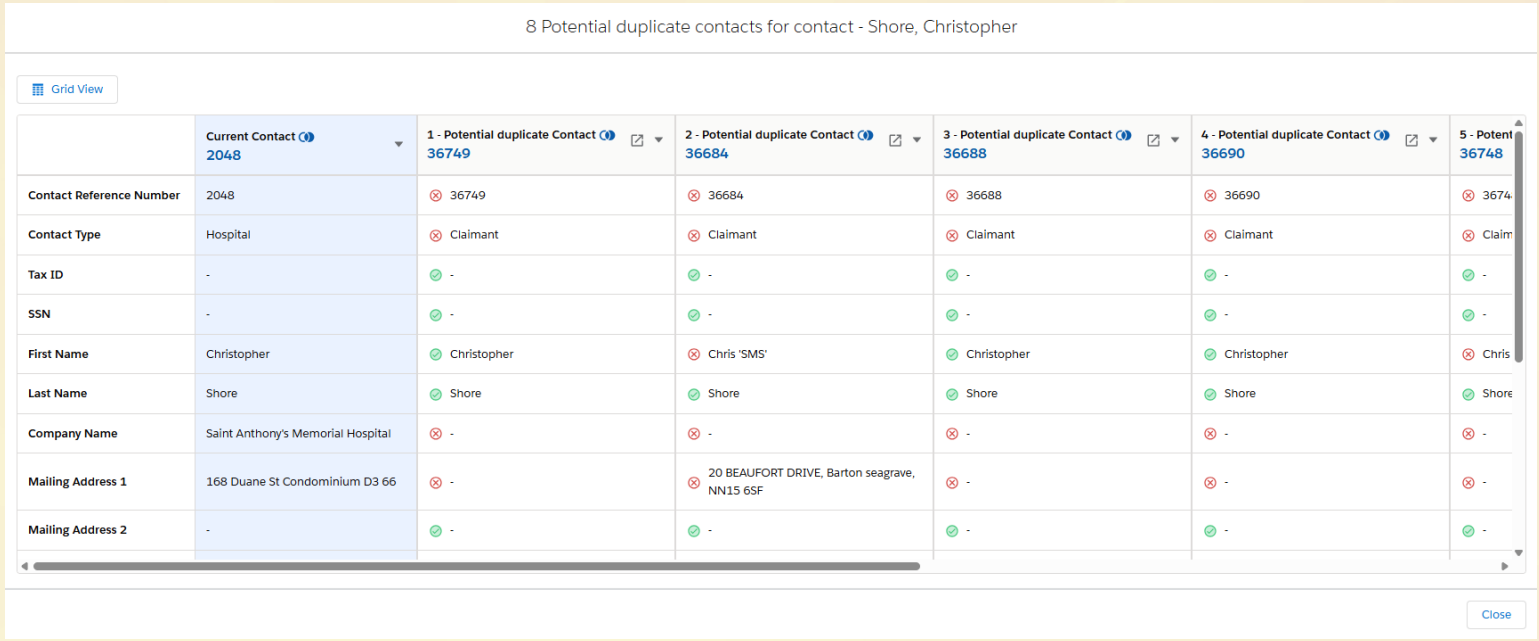
Cleaner Data, Consistent Workflows, Smarter Risk Flags, and the Right Adjuster.

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What's New

ClearSight – Claims Processing Improvements

Duplicate Contact Checking


8 Potential duplicate contacts for contact - Shore, Christopher

Grid View

	Current Contact 2048	1 - Potential duplicate Contact 36749	2 - Potential duplicate Contact 36684	3 - Potential duplicate Contact 36688	4 - Potential duplicate Contact 36690	5 - Potent 36748
Contact Reference Number	2048	36749	36684	36688	36690	3674
Contact Type	Hospital	Claimant	Claimant	Claimant	Claimant	Claim
Tax ID	-	-	-	-	-	-
SSN	-	-	-	-	-	-
First Name	Christopher	Christopher	Chris 'SMS'	Christopher	Christopher	Chris
Last Name	Shore	Shore	Shore	Shore	Shore	Shore
Company Name	Saint Anthony's Memorial Hospital	-	-	-	-	-
Mailing Address 1	168 Duane St Condominium D3 66	-	20 BEAUFORT DRIVE, Barton seagrave, NN15 6SF	-	-	-
Mailing Address 2	-	-	-	-	-	-

Close

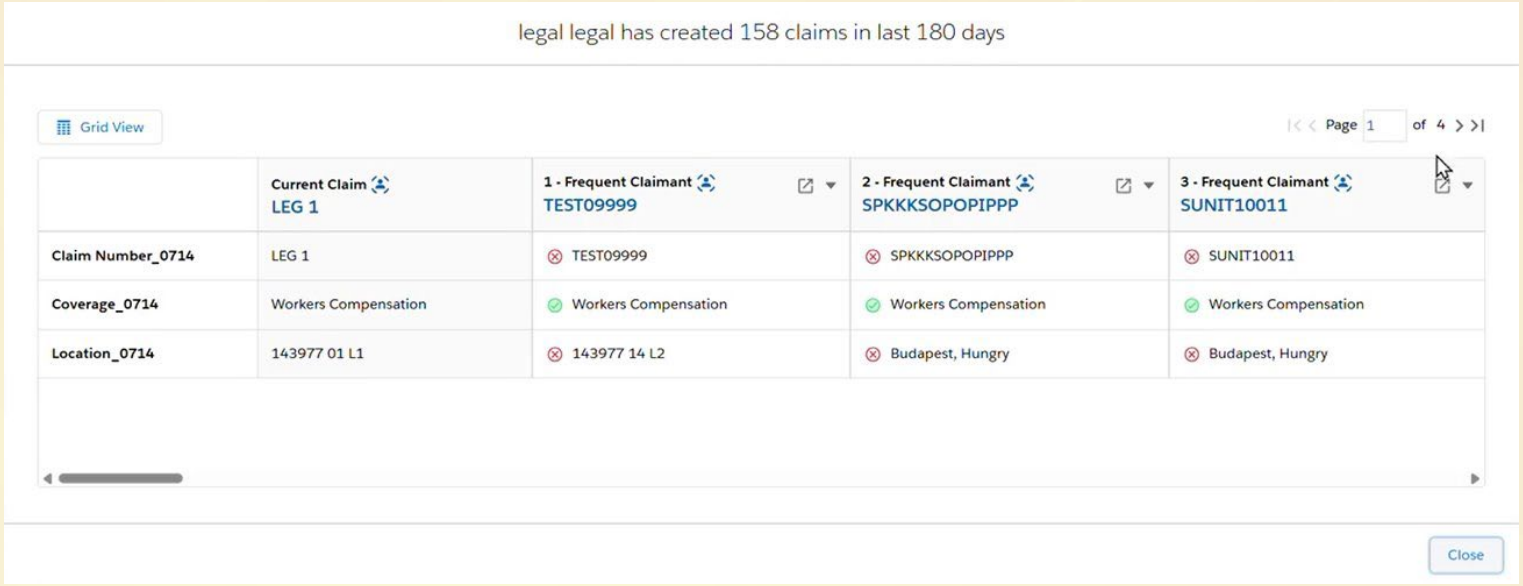
Cleaner Data, Consistent Workflows, Smarter Risk Flags, and the Right Adjuster.

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What's New

ClearSight – Claims Processing Improvements

Identification of Frequent Claimants

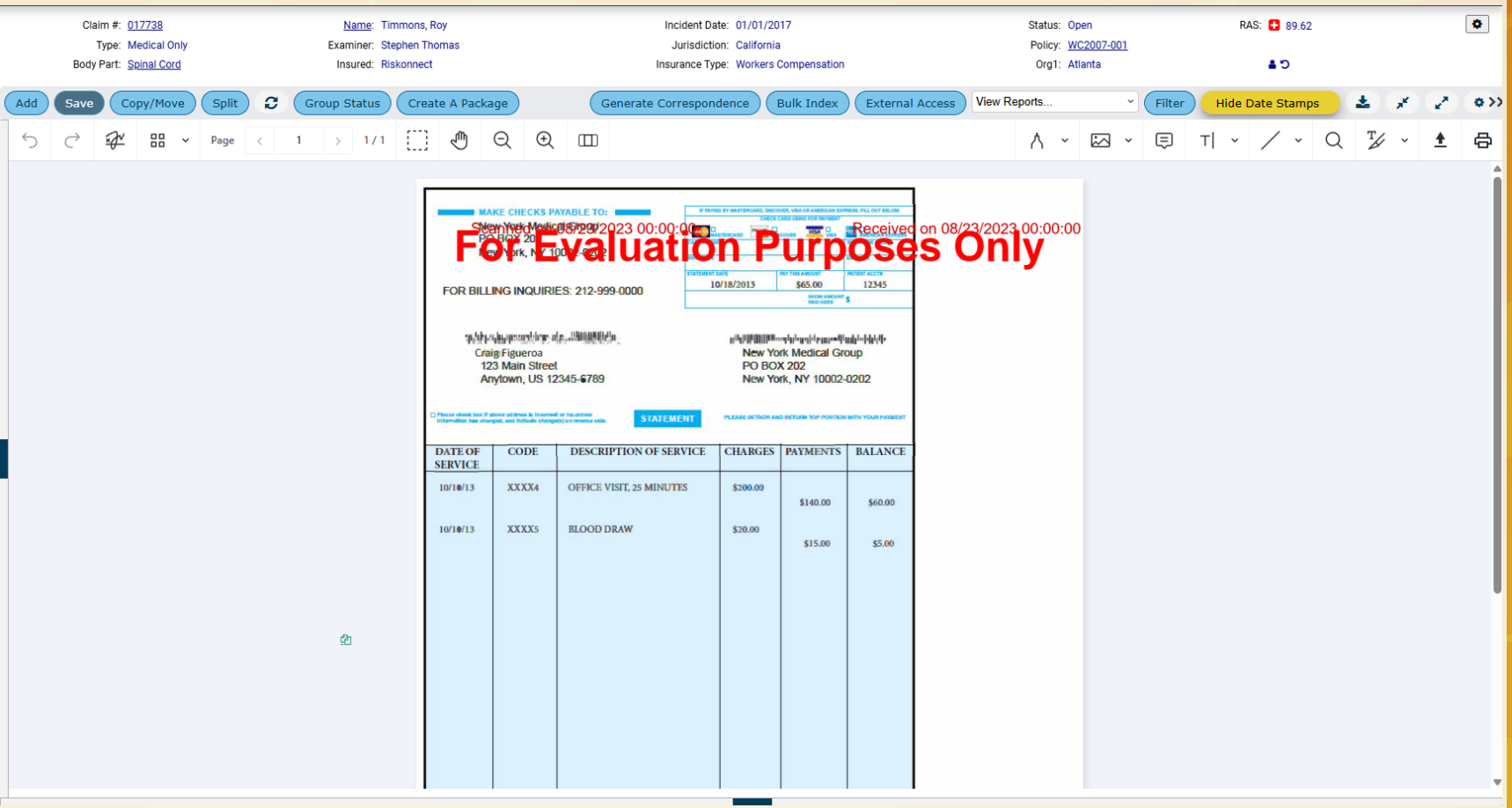


Cleaner Data, Consistent Workflows, Smarter Risk Flags, and the Right Adjuster.

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What's New

Document Image Annotations in Claims Enterprise



Annotate Documents Directly Reducing Reliance on External Systems for Markup During Claims Review

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By the Numbers . . .

225+
new ideas received

130
new functional features delivered

76
% of roadmap based on customer ideas

22
# of releases

15+
AI Capabilities / Agents Launched

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What's Next | Key Enhancements & Improvements

01 Expanded AI

02 Continued Intelligent Claims Processing

03 Premium Allocations+



04 Insights for RK RMIS and ClearSight

05 Further Building of Standard Roadmap for Claims Enterprise

06 EHS Next-Gen

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What's Next

Expanded AI: New AI Ideas Under Evaluation

Platform Items

- External AI Integration
- AI Action Center
- Report Building Agent
- Translations

RMIS Items

- Policy Data Acquisition*
- Erosion Agent
- Auto Coding
- Image Assistant
- AL Vehicle Information

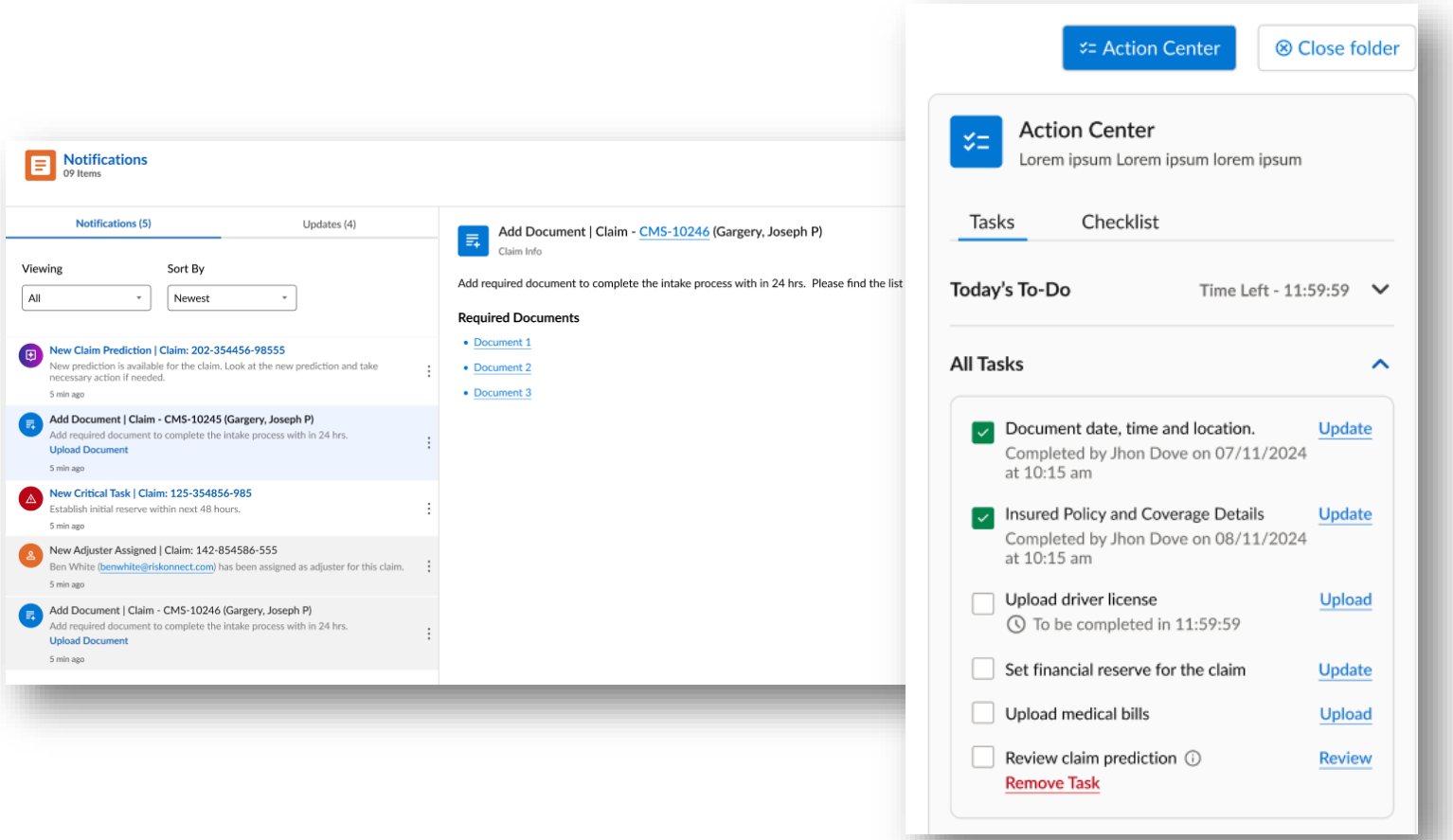
Claims Items

- AI Claims Portfolio Highlight
- AI Adjuster Chat Assistant
- Next Claim Action
  (Operation Model)
- Legal & Medical Summaries
- Fraud Enhancements
  - Guidelines into suggestions
  - Medical / Provider Fraud
  - Billing Fraud
  - Invoice Checking
  - Stock / Fake Image Detection
- RTW Agent / Predict

** Fully Available Partnership with LineSlip*

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What's Next
Continued Intelligent Claims Processing for Clearsight



Further Enhancements

- Automated Coding
- Structured Data from Unstructured Text – Intake from Email and Other Use Cases
- System User Capabilities for Automation, Rules Engine, SDIE/SDIA, Reports, APIs, etc.
- Scheduling of Advanced Rules Engine Automations

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What's Next

Premium Allocations+ for RK RMIS

CURRENT

- Allocation Against Locations and/or Properties
- Data from Locations / Properties in Allocation
- Add in Values data
- Create Formulas (pro-rata, sum, averages, etc.)
- Create Allocation Output

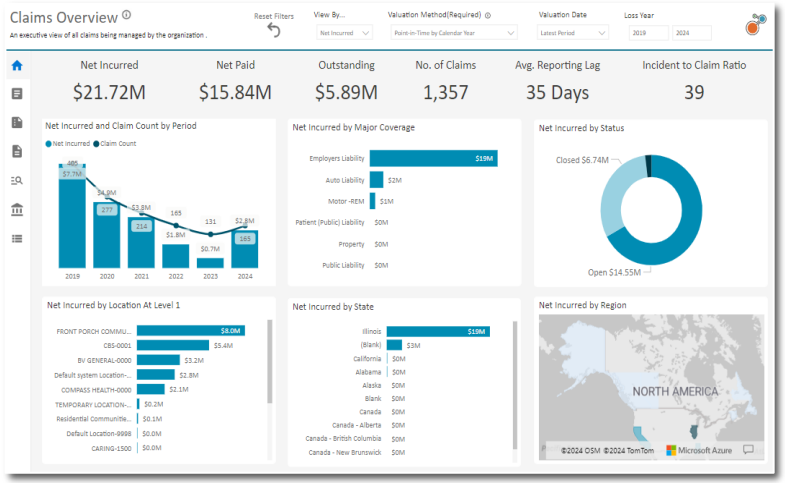
FUTURE

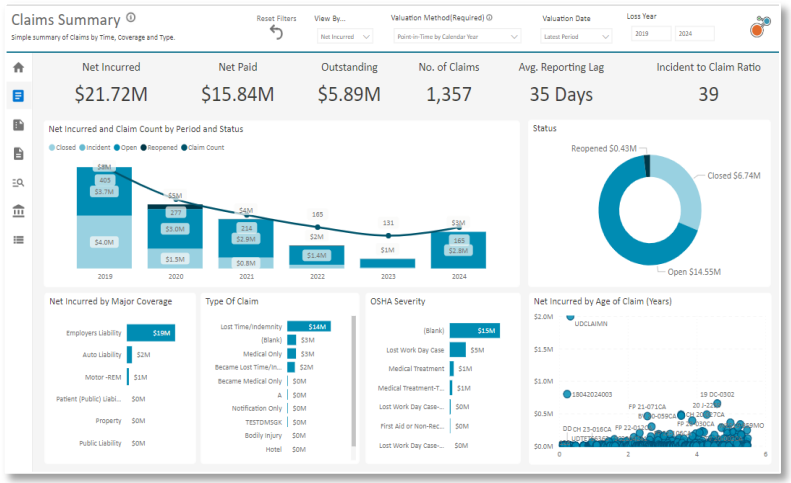
- Add in Policy data
- Premiums Created Automatically Back to Policies
- Add in Additional Outside data (tax rates, rating data)
- Constraint Thresholds for Premium Creations
- Ability to clone/copy allocation

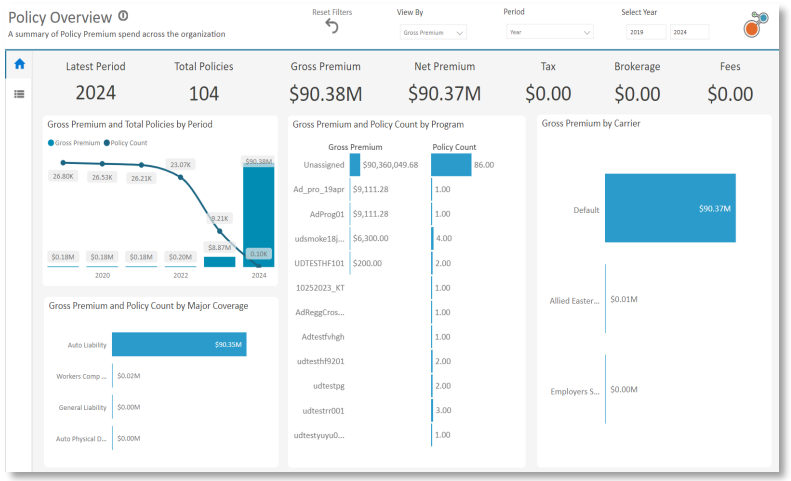
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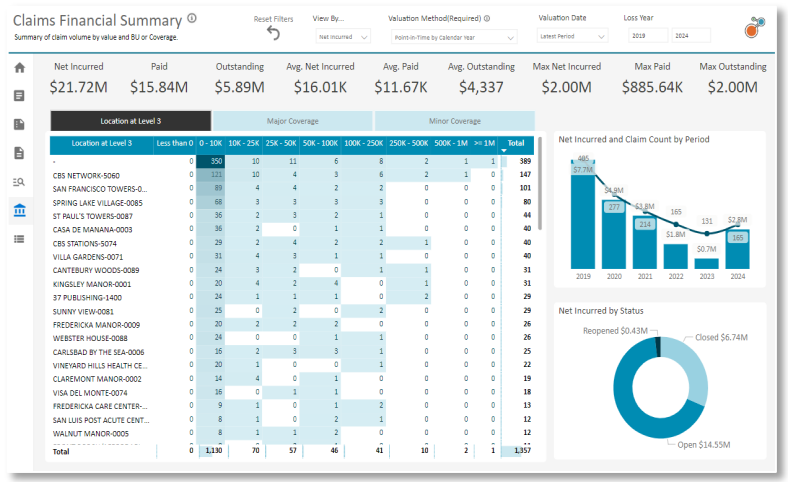
What's Next

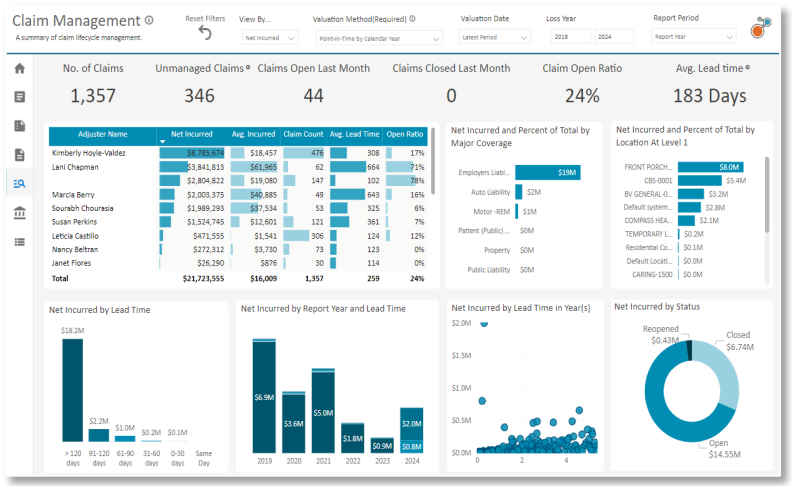
New Insights (Including PIT for RK RMIS)

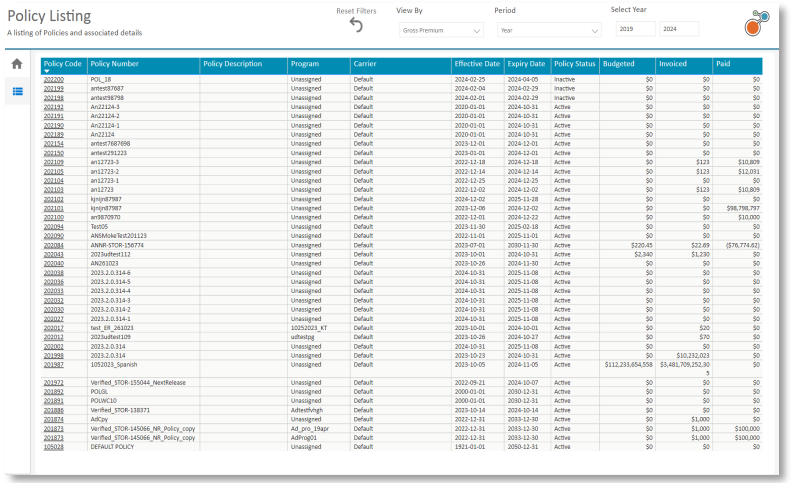








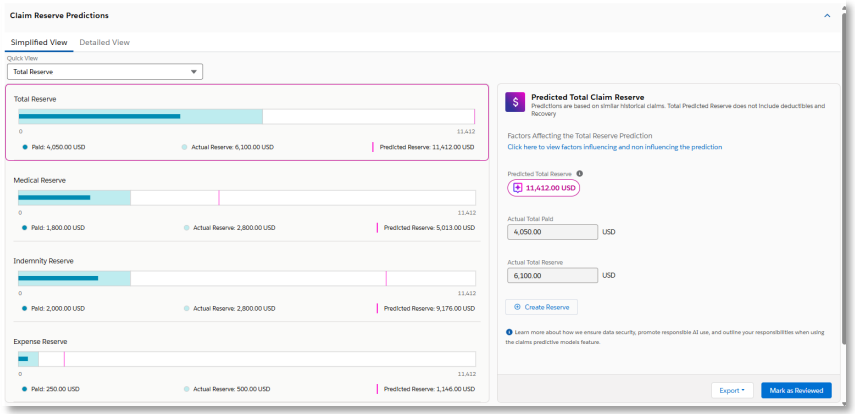




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What's Next
Further Standard Roadmap for Claims Enterprise

AL Claim Predict



Standardized, De-Coupled FROI / SROI Rule Library

Document Summarization

Attachment Summary

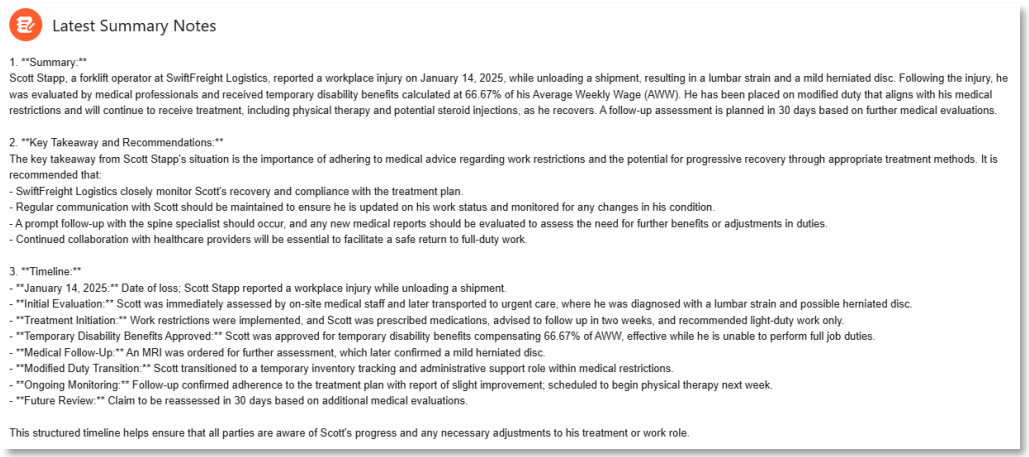
The document details a health insurance claim filed by Mrs. Anita Sharma for gallbladder surgery performed at Apollo Hospital on September 2, 2025. The hospitalization lasted three days, with total expenses of INR 1,80,000. The claimed amount is INR 1,80,000, but approval is pending further review. The submitted documents include the discharge summary, operation notes, and billing receipts. The claim is currently awaiting verification from the medical team.

Key Points:

- Claim ID is CLM100001, filed by Mrs. Anita Sharma under policy number HLT20231234.
- The claim pertains to gallbladder surgery conducted at Apollo Hospital on 02-Sep-2025.
- Hospitalization duration was three days, with total expenses of INR 1,80,000.
- The amount claimed is INR 1,80,000, pending review and approval.
- Supporting documents attached include discharge summary, operation notes, and bills.
- The claim is awaiting verification from the medical team.

Learn more about how we ensure data security, promote responsible AI use, and outline your responsibilities when using the generate attachment summary feature.

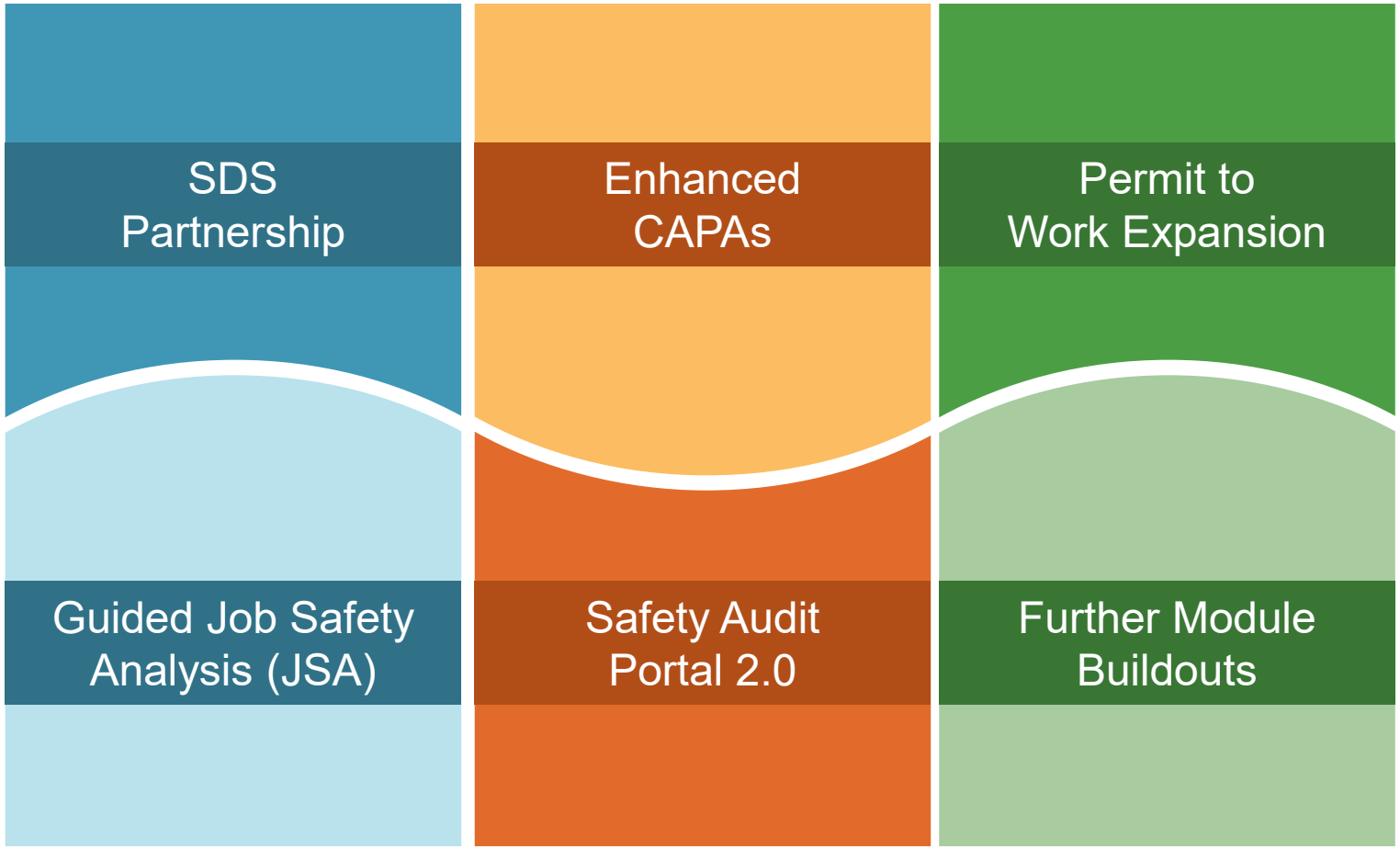
Notes Summarization



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What's Next

EHS Next-Gen



Fully Robust Workflow Enhancements to Enhance Automation and Simplification of Managing Health & Safety Programs

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Get involved!

- **Reach out** to your Customer Success Manager (CSM) to get started with new features
- **Set up** a roadmap stewardship session
- **Sign up** for the product council
- **Add ideas** to the portal

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QUESTIONS

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THANK YOU
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