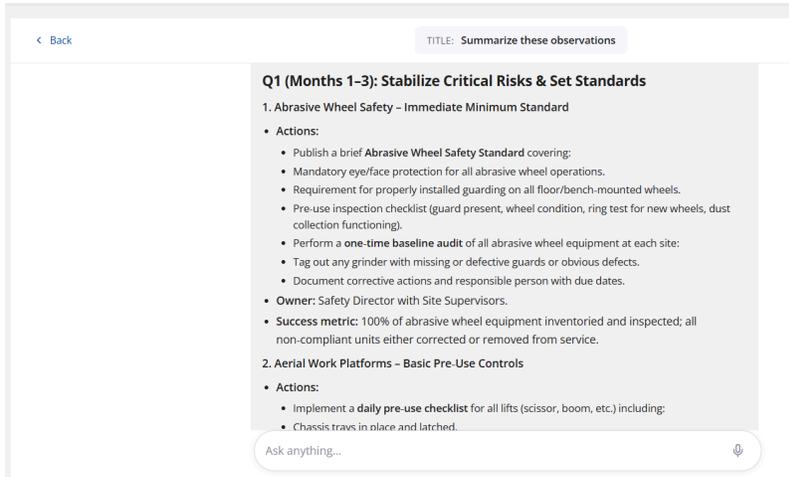We're excited to share major platform updates that will significantly enhance client analytics, reporting flexibility, and workflow efficiency across the RTRS Safety platform this month.

# Observations and Mobile Forms AI

Observations Analyze



Introducing **Observations and Mobile Forms AI**, a new AI tool that allows clients to analyze observations and mobile forms data directly from the client website.
This enables clients to:

- Identify trends across projects, divisions, or timeframes
- Summarize large batches of observations instantly
- Surface recurring exposures and leading indicators
- Generate proactive risk narratives for brokers, carriers, and executives

AI works best when:

- Observations/Forms are filtered intentionally (project, date range, category, etc.)
- Clear context is provided when prompted
- It is used alongside dashboards and table views for validation

👉 Please review RTRS AI User Guide here.
Read: 47 Ways RTRS AI can be leveraged with Observations

Read: [50 Ways RTRS AI can be leveraged with Mobile Forms](#)

# Mobile Forms Dashboard
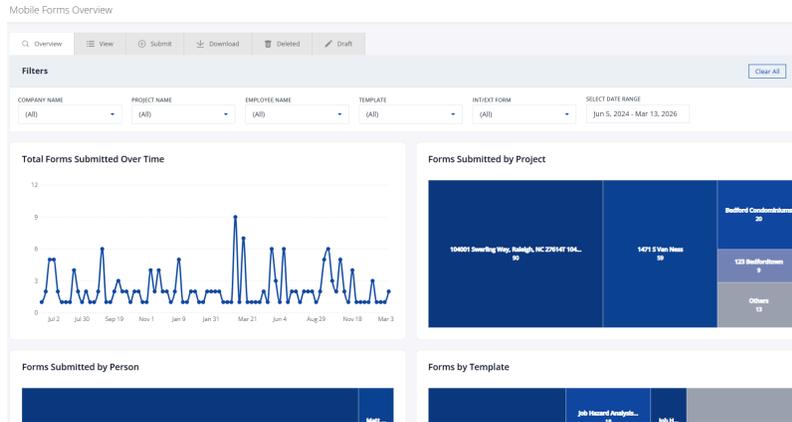


We're adding a **new Dashboard tab "Overview" inside the Mobile Forms module**.
You will now be able to view:

- Mobile forms completed over time
- Breakdowns by template
- Breakdowns by project and user

This mirrors the enhancement we launched last month in the Observations module and provides immediate usage visibility.

# Right-Pane Quick View Across the Platform
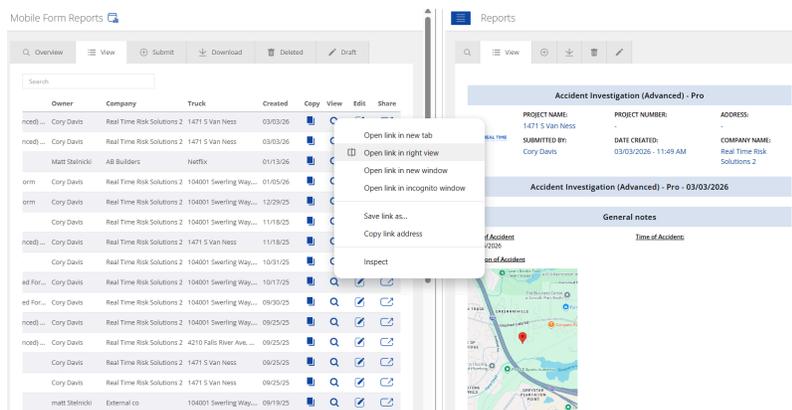


Throughout the platform (Observations, Toolbox Talks, Training, etc.), clients can now:

- Right-click to open a report in a **right-side preview pane**
- Open reports in **new tabs**
- Reduce back-and-forth navigation

This significantly improves workflow efficiency when reviewing multiple reports.
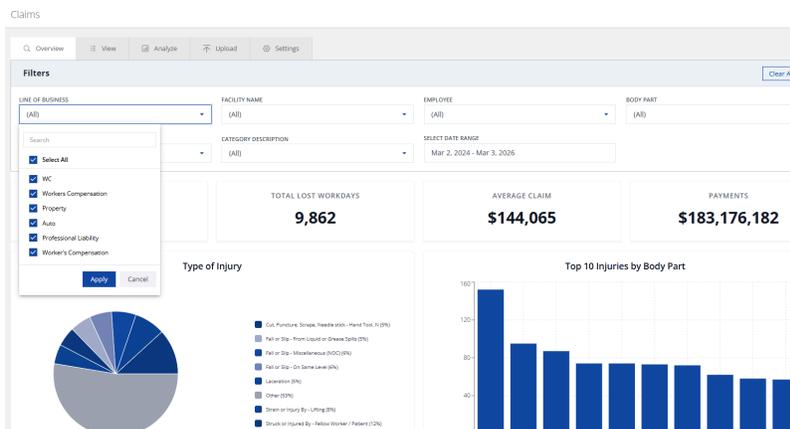
# Observations – Advanced Open Issues Filtering



Within the **Open Issues** page:

- Advanced filtering will be added
- Column selections will be remembered on a user level

This allows for faster issue tracking and better review workflows.

# Expanded Claims Module



We are significantly expanding the **Claims Module**.

Clients can now ingest and analyze **20+ lines of business**, all aggregated into a single analytics environment, enabling:

- Portfolio-level intelligence

- Cross-line loss trend analysis
- Broker renewal narratives
- Carrier early-warning indicators
- Risk manager claim frequency reduction insights

**New Enhancements will include:**

- **Carrier "As-Of Date" Tracking**
  Each loss run now captures the date the report was generated by the carrier — improving transparency and trend accuracy.
- **New 3x3 Claims Dashboard Layout**
  A redesigned dashboard will provide greater granularity and clearer visual segmentation of claims metrics.

This creates a single source of truth for multi-line claims intelligence.

# What These Changes Means for our Clients

These updates are designed to:

- Turn static data into live intelligence
- Reduce reporting friction
- Improve executive-level storytelling
- Increase analytical depth without increasing administrative burden