

ClaimWizard

ONSITE TRAINING PROPOSAL

Pre-Training Discovery & Audit

IMPORTANT DATES:

Prerequisite Information Due By:	TBD
Phone Meeting:	TBD
Training Dates:	TBD

OBJECTIVE:

Phone meeting to set processes, training, and expectations for on-site training.

TASKS:

1. Compile any existing documented claim procedure your company has in order to complete this packet
2. Any existing documentation / letters your company uses in order to complete this packet
3. Audit & Workflow Packet (*that is THIS packet*) to be completed and returned no later than five business days from date of meeting

CALL TOPICS:

1. **System & Process Overview** : Brief review of your current claim system and processes to determine level of staff knowledge and usage
2. **Document Templates** : Review current templates you use for letters, POL, LOR, pre-authorizations, etc.
3. **Default File Folders** : Usage of default claim file folders and storage
4. **Security Roles & Employee Access** : Verify employee security access, job roles, and escalation paths

Required Information for Planning Call

ClaimWizard has developed an effective and proven approach to training. To ensure your success, there are a couple of important prerequisites.

COMPANY ORGANIZATION CHART:

Please provide a complete list of all employees along with their functional role.

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CURRENT CLAIM PROCESS:

You will need to document your existing process to process claims.

If you have a documented SOP (standard operating procedure) it just becomes a matter of using that document.

If you do not currently have a documented procedure for your team to work claims, our suggestion is to take your ten most recent claims and 'follow' them through their life cycle.

Need help getting started? Using a piece of paper or a spreadsheet - one for each claim - document EVERY SINGLE THING you or anyone else on your team does with a claim.

Send an email? Document it. Take a phone call? Document it.

On your sheet, you don't need to document WHAT the email says (you should be storing that with the claim anyhow), but the overview of the task that was done. Be sure to initial items so that you know who performed the task. Example:

1. 09/21/2020 - (DC) PA sent email to carrier adjuster with request to set a meeting time for inspection at property
2. 09/25/2020 - (LY) PA received email from carrier with confirmation of inspection date/time
3. 09/26/2020 - (JT) Estimator started inventory report
4. 09/20/2020 - (JT) Estimator completed inventory report and sent to Office Staff

Once this is complete for all ten claims, you will have a pretty solid idea of the process you use to work claims. Within the ten, you may run into a claim that isn't worked as the rest are. Keep this in your back pocket, you may need to create a separate Action Item workflow to accommodate those outlier claims.

These completed sheets will help you determine:

- The tasks you need to perform on each claim
- The person responsible for each task
- How long the task should take (or the max amount of time allowed for task if there is a legal deadline)
- What needs to happen next
- Who needs to do the next task

A sample "workflow of your workflow" might look something like this...

- [Simple Workflow for Public Adjusting Company \(1-3 Adjusters\)](#)
- [Sample Workflow for Public Adjusting Company \(3+ Adjusters\)](#)

Don't worry about making your process 'perfect' - that is what we will be working on together. Once I can analyze your existing claim workflow, I can make efficiently and auditing suggestions as well as design and code an updated workflow into your ClaimWizard account.

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CLAIM TASKS TO CONSIDER:

We've compiled a few examples of milestones and tasks that you may need to consider:

1. What we do when a new claim process is started (signed, contract 'in hand')
 1. Send New Client Welcome Packet that describes your company's process and what is required of client; including any documents they need to sign/complete & a copy of the executed contract
 2. Do you regularly need to communicate and/or issue correspondence to clients in multiple languages?
2. How do you notify the carrier that you are handling the claim?
 1. Send Letter of Representation and/or Notification within xxx days/hours of client contract
3. How to choose an Adjuster on a claim
 1. adjuster is same person that signed claim
 2. sales rep determines which adjuster is assigned to work a claim
 3. owner or principal in company determines which adjuster(s) will work a claim based on:
 1. size of claim
 2. current workload of adjuster
 3. type of structure
 4. type of peril
 5. other
4. How to determine who/when an inspection/scope/estimate is done on a claim
 1. adjusters estimate their own claims
 2. inside estimator is assigned to claims (based on similar criteria as assigning an adjuster above)
 3. outside estimator is assigned to claims (based on similar criteria as assigning an adjuster above)
 4. inside contents/inventory specialist is assigned to claims (based on similar criteria as assigning an adjuster above)
 5. outside contents/inventory specialist is assigned to claims (based on similar criteria as assigning an adjuster above)
 6. experts or outside vendors are brought in for specific types of work (dry-out, weather forensics, remediation, etc.)
5. How the claim is adjusted/negotiated/settled with the carrier
 1. are different loss types within the claim (ALE/BI, contents, structure, etc.) adjusted separately and expected to settle separately or all at once?

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2. Do you track recoverable depreciation?
3. Do you issue the carrier a demand / estimate or POL?
4. Do you meet with the carrier adjuster on property to negotiate loss & amounts and THEN write up your demand?
6. Do you need to deal with mortgage companies?
 1. If yes, what is your process?
 2. If no, how do you deal with partially signed checks?
7. How do you issue invoices and collect company fee payment from your clients?
 1. Are you doing a check exchange?
 2. Do you issue an invoice?
8. How do you calculate your company fee, adjuster commissions, and vendor invoices?
 1. spreadsheet?
9. How do you handle when claims go into 'exception' (appraisal, coverage denial, re-inspection, pre-/litigation, etc.)?
 1. Do you deal with any of these exception phases on a regular basis?
10. What default documents does your company use?
 1. Client Contract
 2. Letter of Representation
 3. Letter of Notification
 4. Client Welcome Packet
 5. Mortgage Pre-Authorization Letter
 6. Proof of Loss
 7. Demand Letter to accompany estimate
 8. Client Invoice
 9. Generic Letterhead with Client/Property/Claim information

Training Environment Setup

NEEDED:

- ★ WiFi & projector or large screen television with computer hookup
- ★ Conference room or training area to hold department / staff
- ★ Snacks & lunch to feed your staff

Pre-Training Session & Audit

PREREQUISITES:

1. Any existing documented claim procedure your company uses
2. Any existing documentation / letters your company uses
3. Audit & Workflow packet will be sent to your company's principals to be completed and returned no later than five business days from date of meeting
4. All team members are expected to have completed the "Getting Started with ClaimWizard" eCourse (progress is tracked)

AUDIENCE:

Executives & Managers

OBJECTIVE:

REMOTE : Zoom/phone meeting (no later than Thursday, December 2, 2021)

OBJECTIVE: To set processes, training, and expectations including:

- ★ **System & Process Overview** : Brief overview of your company's current claim process and systems (pre-sales to post-sales)
- ★ **Document Templates** : Review current templates
- ★ **Team Security Roles** : Review employee security, job roles, and escalation paths

DELIVERABLES / OUTCOME:

- ★ Preliminary Action Item Workflows
- ★ Clear roles for staff and executives

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Training Day 1 (9:00am - 12:00pm)

PREREQUISITES:

1. Pre-Training session, including completion of executive / manager tasks and team eCourse completion

NOTES :

Training becomes highly customized from information gained and developed during the Pre-Training session. Outlined below is a general overview of how training will transpire.

AUDIENCE:

- Office Staff
- Management (optional)

OBJECTIVE:

ClaimWizard system training, claim best practices, and educate on claim management procedure:

- ★ **Originate a Claim** : How to use Fast Entry to originate a claim, how to manually enter a claim via client/property/claim, how to add a new property to an existing client, how to add a new claim to an existing client/property
- ★ **Assigning Claims** : How to assign personnel to claims, how to utilize various roles to ensure tasks are assigned correctly
- ★ **Updating Claims** : Process for updating claims including
 - activity log (diary) entries
 - ad-hoc Action Item additions & phase changes
 - uploading files
- ★ **Reports** : How to access, search, and run reports

TRAINING DAY 1 (1:00PM - 5:00PM)

PREREQUISITES:

1. Attendance in AM training session and/or Pre-Training session

AUDIENCE:

- Office Staff
- Management

OBJECTIVE:

Train on ClaimWizard system and best practices, educate on claim management procedure

CONTENT OVERVIEW:

- ★ **Searching & Shortcuts** : ClaimWizard searching tips and tricks
- ★ **Claim Phases** : Overview of Claim Phases and how they can be automatically or manually updated
- ★ **Template Generation** : How to access, generate, modify, and save document templates

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- ★ **Miscellaneous Data Points** : Notes, Mortgages & Liens, Invoicing, Calendar & Scheduling, Settlements & Offers
- ★ **Team Management** : Overview on to to track, escalate, and load-balance office team responsibilities
- ★ **Claim Walkthrough** : Have a real and current claim at the ready so that your team and ClaimWizard can observe the process end-to-end and make recommendations

TRAINING DAY 2 - (9:00AM - 12:00PM)

PREREQUISITES:

1. Materials & attendance from Training Day 1

AUDIENCE:

- Office Staff
- Management (optional)

OBJECTIVE:

Work with specialty office staff & business owners

CONTENT OVERVIEW:

- ★ **Finances** : Settlements & Offers overview, Claim Ledger including company fees, expense tracking, invoicing, disbursement worksheets (Executive or Finance clearance needed)
- ★ **Closing & Deleting Claims** : How to close a claim including necessary information (Office Staff or Executive clearance needed), how to delete a claim (Executive or Office Manager clearance needed)
- ★ **One-to-One** : Work with any individual staff member on specific job tasks such as Action Items, Templates, Alerts & Conditions, and Financial / Disbursements

EXECUTIVE WRAP-UP - END OF DAY 2

PREREQUISITES:

1. Materials & notes from training

AUDIENCE:

Executives & Managers

OBJECTIVE:

Debriefing, recommendations & next-steps

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Price Quote

- ★ **Fee is \$3,500**
- ★ Training is ONE AND A HALF DAYS at your location of choice
- ★ Unlimited attendees permitted from your company
- ★ Training includes business and process consulting
- ★ More details on the [On-Site Training](#) page

Payment can be made via business check to:

ClaimWizard
19210 Huebner Road #200
San Antonio, TX 78258

Training Agreement

In signing this document and initialing each page, I acknowledge that:

- I have received and reviewed the ClaimWizard Onsite Training Proposal
- I will return all required documentation on or before deadline and failure to do so may result in training not being able to be conducted as outlined
- Travel arrangements will not be made by ClaimWizard until payment is received in full (invoice attached)
- If training needs to be postponed for any reason after payment has been made, you are entitled to schedule a future training (minus whatever out of pocket expenses ClaimWizard has already incurred) to be applied to training so long as it is held within 12 months of original training date

Signature

Date