

## Training Environment Setup

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### NEEDED:

- ★ Wifi & projector or large screen television with computer hookup
- ★ Conference room or training area to hold entire staff
- ★ Snacks & lunch to feed your staff!

## Pre-Training Session & Audit

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### 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

### AUDIENCE:

Executives & Mangers

### OBJECTIVE:

Phone meeting (no later than five business days from date of on-site training session) to set processes, training, and expectations including:

- ★ **System & Process Overview** : Brief overview of system to determine level of staff knowledge and usage, overview of current and proposed claim process
- ★ **Action Items** : Review current claim process (leads to repeat client lifecycle), feature functionality overview, and design preliminary processes including trigger events, completed actions, overdue actions, and phase changes
- ★ **Document Templates** : Review current templates and identify any ways to consolidate forms using scripted logic
- ★ **Claim Phases** : Overview of Claim Phases and how they can be automatically or manually updated
- ★ **Message Archiving** : Overview on how email/message archiving works including reports, holding queue, and security
- ★ **Claim Activity Events** : Review stock ClaimWizard activity events and standardize and streamline verbiage for needs
- ★ **Default File Folders** : Configuration and usage of default claim file folders

# ClaimWizard

## ONE DAY ON-SITE TRAINING PREREQUISITES & AGENDA

- ★ **Claim Alerts & Conditions** : Review Alerts & Conditions and standardize for needs
- ★ **Security Roles & Employee Access** : Verify and/or modify employee system security, job roles, and escalation paths

## Training Day 1 - AM

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### PREREQUISITES:

1. Pre-Training session, including completion of workflow and audit questionnaire

### AUDIENCE:

Office Staff & Management

### OBJECTIVE:

ClaimWizard system training, Action Item Workflow, 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
- ★ **Action Item Workflow** : How to locate your current Action Items per claim and across all assigned/opened claims, how to modify an existing claim Action Item, how to run reports
- ★ **Reports** : How to access, search, and run reports

## Training Day 1 - PM

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### PREREQUISITES:

1. Bring any document / unique job functions and procedures

# ClaimWizard

## ONE DAY ON-SITE TRAINING PREREQUISITES & AGENDA

### AUDIENCE:

Office Staff & Assignables (Adjusters, Apprentices, Loss Consultants, Estimators, etc.)

### OBJECTIVE:

ClaimWizard System Training & Action Item Workflow using your company's specific workflow and business process

★ **Updating Claims** : Process for updating claims via web browser and mobile application including:

- activity log (diary) entries
- ad-hoc Action Item additions & phase changes
- uploading files

★ **Action Item Workflow** : How to locate your current Action Items per claim and across all assigned/opened claims, how to modify an existing claim Action Item, how to run reports

★ **Reports** : How to access, search, and run reports

## Executive Wrap-Up

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### PREREQUISITES:

1. Materials & notes from training

### AUDIENCE:

Executives & Managers

### OBJECTIVE:

Debriefing, recommendations & next-steps