ClaimWizard

TWO DAY ON-SITE TRAINING PREREQUISITES & AGENDA

Training Environment Setup

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

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

★ **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

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

PREREQUISITES:

1. Attendance in AM training session

AUDIENCE:

Office Staff

OBJECTIVE:

Train on ClaimWizard system and best practices, educate on claim management procedure (these topics are not included in the single day training session)

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

★ **Miscellaneous Data Points** : Notes, Mortgages & Liens, Invoicing, Calendar & Scheduling, Settlements & Offers

Training Day 2 - AM

PREREQUISITES:

1. Materials & attendance from Training Day 1

AUDIENCE:

Office Staff & Executives

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

Training Day 2 - PM

PREREQUISITES:

1. Bring any document / unique job functions and procedures

AUDIENCE:

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

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

★ **Misc. Topics** : Any topic or procedure your company needs to teach your adjusters about your business process

Executive Wrap-Up

PREREQUISITES:

1. Materials & notes from training

AUDIENCE:

Executives & Managers

OBJECTIVE:

Debriefing, recommendations & next-steps