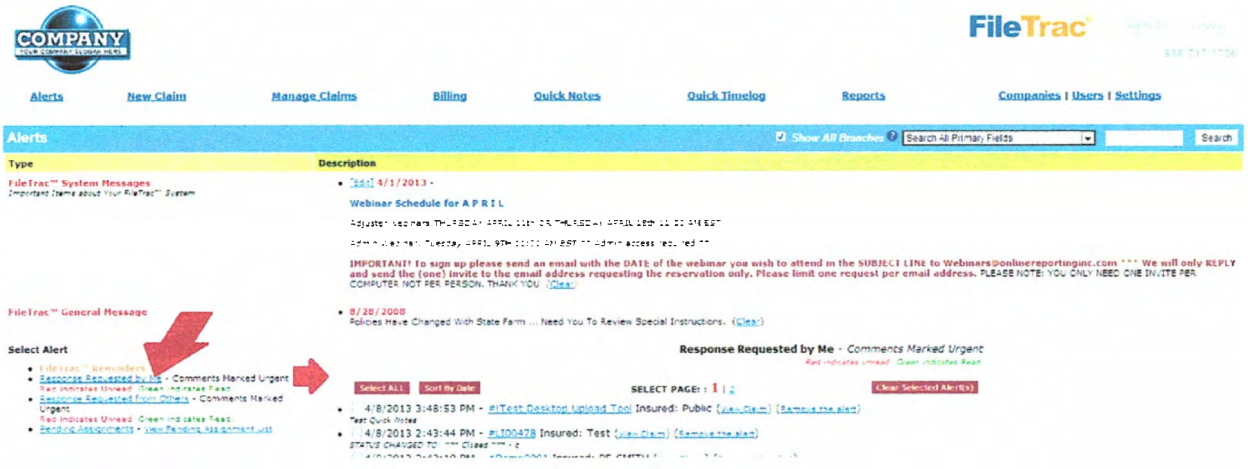
Welcome to FileTrac Claims Management System-Adjusters

Now that you have logged into the system you are ready to start using FileTrac to perform various activities in the system. The majority of the time you will use the **Alerts Page**, which you are currently viewing, and the other section of the system you will use the most is the **Manage Claims screen.** We will review a few key items in each page that you will need to know to properly navigate around the system.

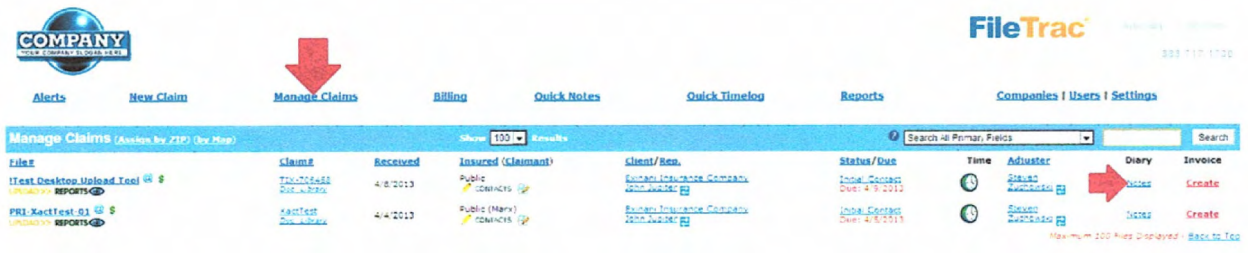
ALERTS PAGE

To populate an Alert please click on the name of the alert in blue and underlined, this will populate the alerts in the middle/right hand side box.

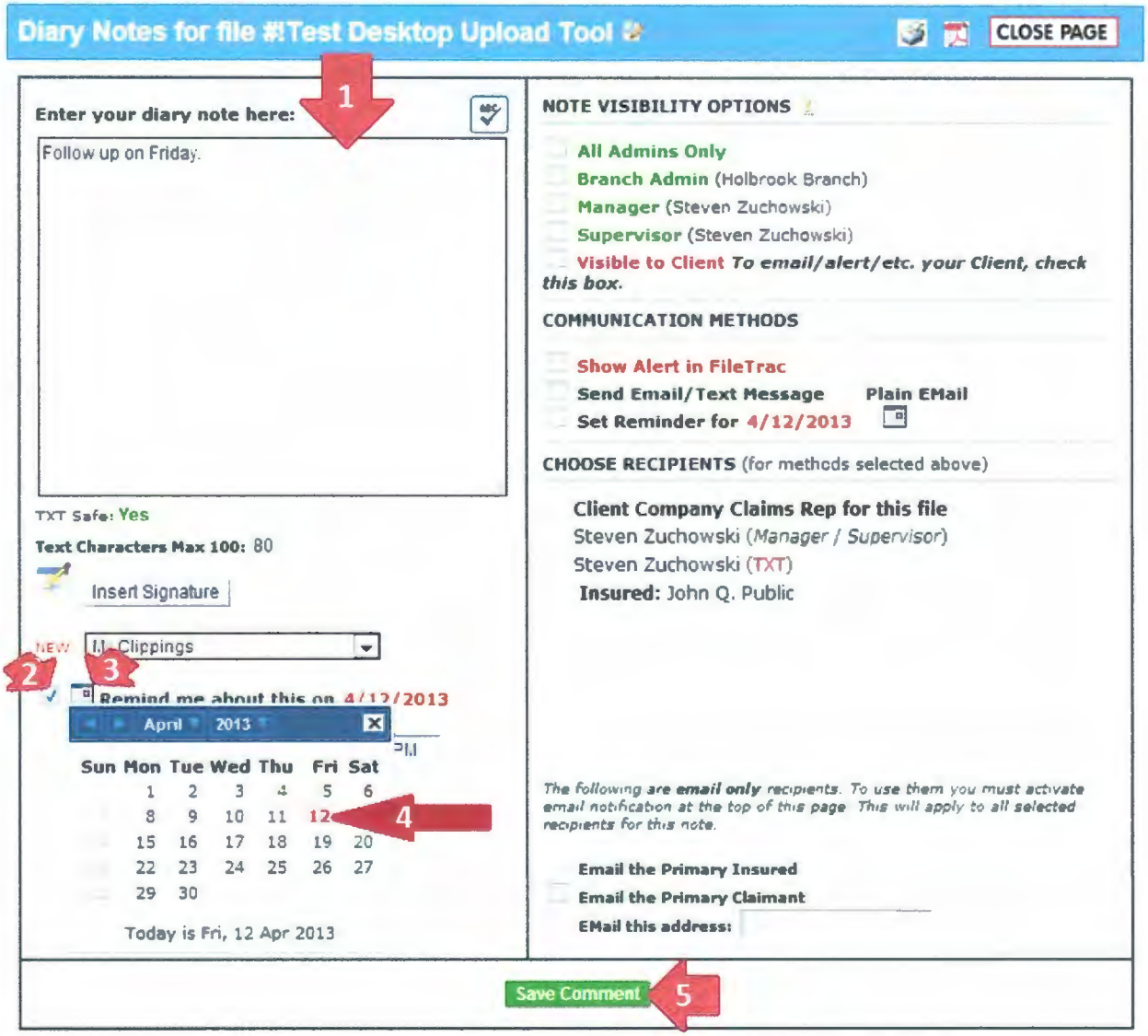


Note: With all the alerts you will want to keep them cleared out so that your system will run more efficiently. Remember to click the Clear, Mark as Read or Remove the Alert, buttons.

1) *FileTrac Reminders*: This feature is created by putting a note in a file and then selecting a date in the future that you wish to follow up on something regarding that file. To create the reminder go to the **Manage Claims** (1) screen and click on the word ***Notes*** (2) under the Diary Heading, for the file you wish to make a note on.



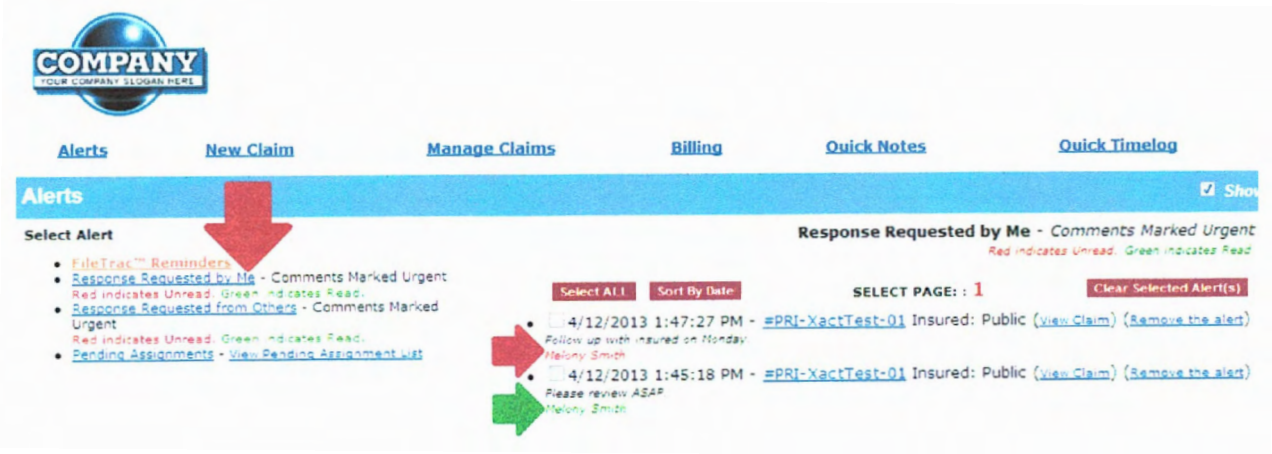
Enter your note in the big box, then go down below the box and click on the little select box next to a calendar icon, click on the calendar icon and select the date you want to be reminded of this note. Click on the green Save Comment.



The note will be placed in the file and you will be notified on the date you selected through this alert. On the date that the reminder populates, simply click on the **File# (link)** and it will take you right to that file so that you can go in and view what you need to.

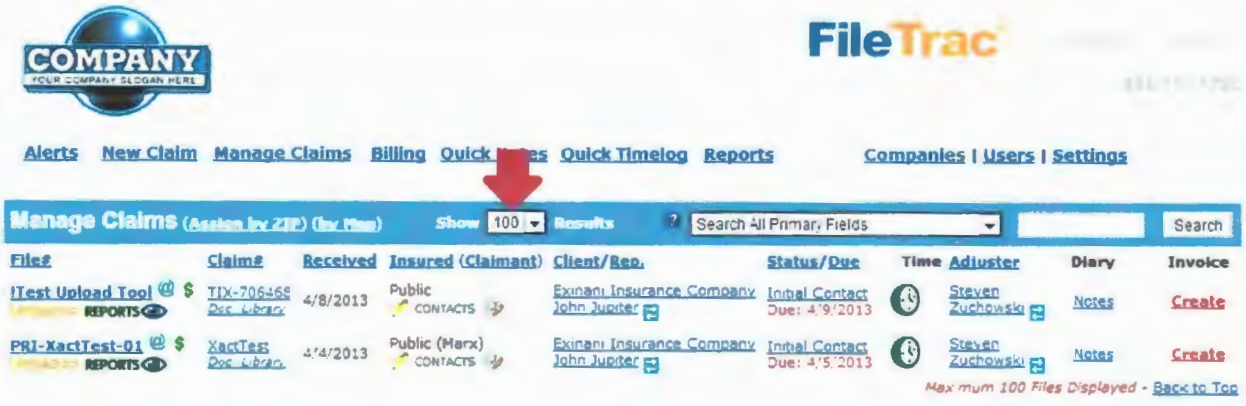
2) *Response Requested From Others*: This Alert lets you know that someone has put a note in a file and selected to send you an alert within FileTrac. Depending on the alert message you will have 3 options. If they were just notifying you of something and no activity is required, once you have read the message, simply click on (Mark as Read) this will clear the message on your screen and on the sender's ***Response Requested From Me*** it will change the color of your name from Red to Green so that they are aware you had read the note. If the sender wants you to go to the file to view a report and you need to get in that file click on (View Claim), this will take you right to the claim and show you any reports that were uploaded or have the ability to navigate around that file. If the sender was simply asking a question and you need to respond to them, click on the file number #Test-00123, this will automatically pull up the Notes screen for this file where you can click in the big notes box, enter your response and then you have the option to send them an alert in FileTrac and/or email, by clicking the appropriate boxes on the right, select their name from the recipient list and then click the Save Comment. Your response will be documented in the Notes for that file. You always need to click Mark as Read in your ***Response Requested From Others*** to let the person know you took action on that Alert.

3) *Responses Requested by Me:* These are alerts that you have sent someone by putting a note in the file and selecting to send them an alert. If you see the person's name in Green then they have read the message and you can click on the (Remove the alert) and this will remove the message from your screen. If their name is still in Red then you can assume that they did not read that message yet and you can click on the (View Claim), this will take you directly to the claim to navigate around that file to see if they have done what was asked of them. Another option you have is to click on the file number #Test-00123, which will open the Notes screen for that file and enter another note to that individual, and again send them an alert and/or email by checking the appropriate box on the right hand side and select their name in the recipient list, then click the Save Comment.

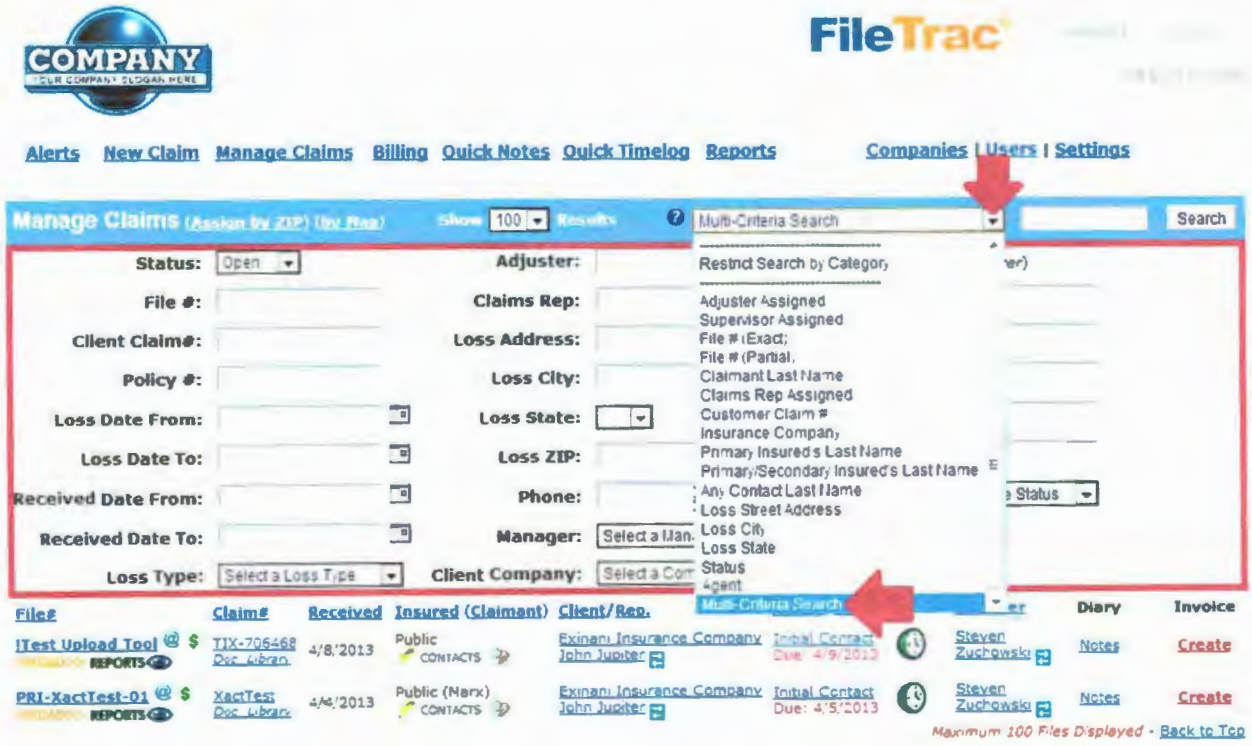


MANAGE CLAIMS SCREEN

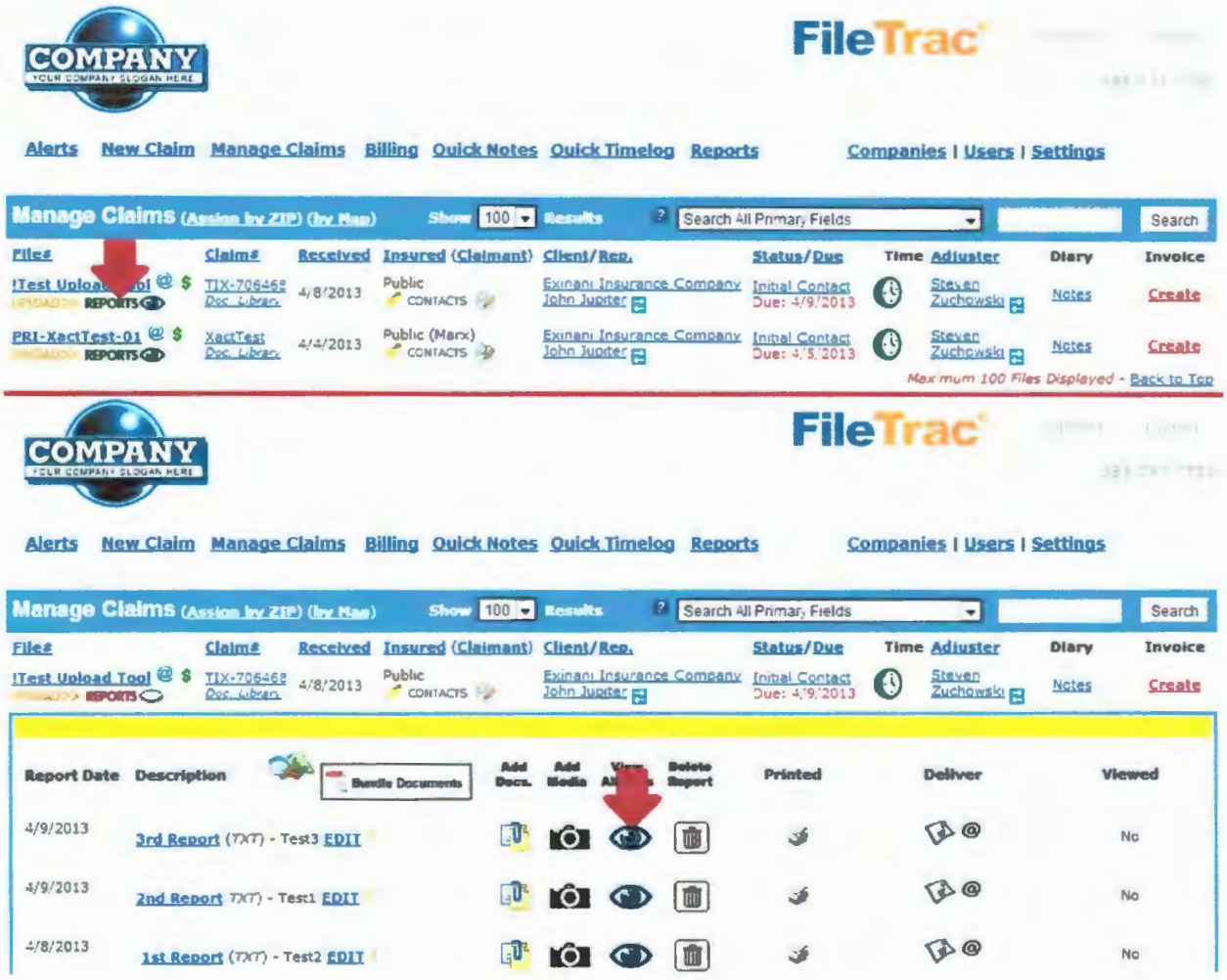
This is the section of the system that will list all of your open files. Once a file is closed it is removed from this page but can be recalled at any time by using the drop down Search option in the Blue Bar. The first thing we recommend is selecting how many files you want this screen to populate you have the options of 10, 25, 50 or 100, we recommend 25.



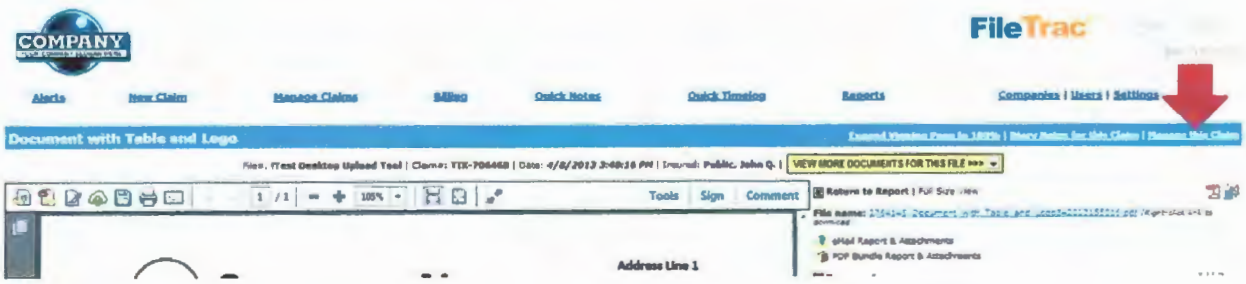
Next go to the dropdown on the right hand side in the blue bar and select Multi-Criteria Search and then click the Search button in the blue bar and this will lock this feature in. The Multi-Criteria Search is a powerful tool to search for any file that is opened, closed or both (if you are not sure the status of the file). You can also use partial searches in several of the fields.



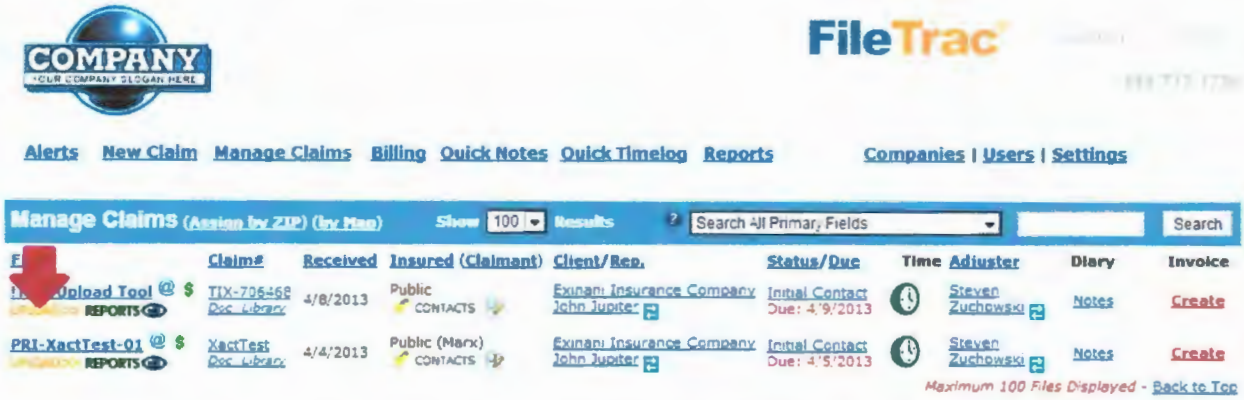
1) ***Viewing Documents:*** Once you have located the file you wish to review click on the REPORTS icon this will open the file and show you a list of all the documents that have been uploaded to this file. To view an individual document click on the eyeball icon in the same line as the document you want to view.



Note*: After viewing a document and you wish to remain in the claim, look up in the blue bar to the right and click on* ***Manage this Claim****, this will keep you within this claim instead of clicking on the Mange Claims heading and bringing you back to the list of open files.*

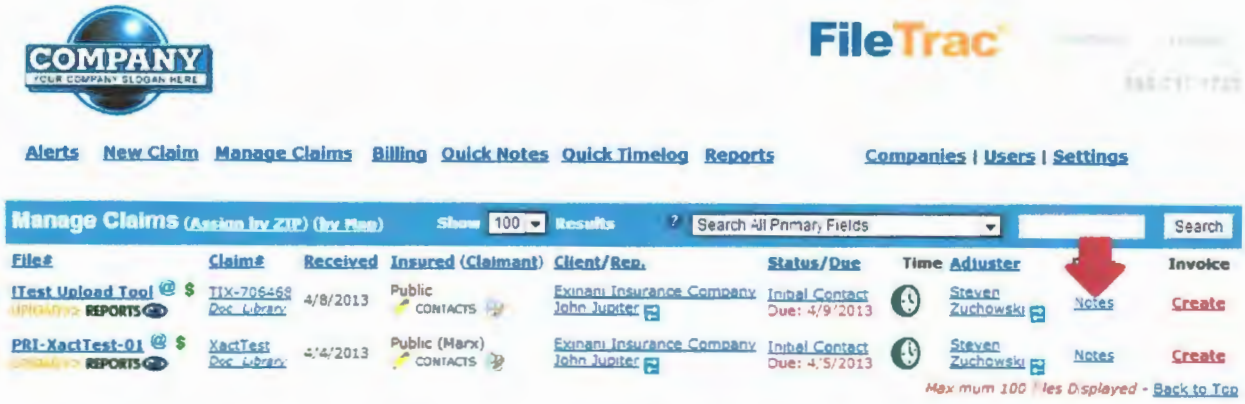


2) *Uploading Documents:* To upload a document click on the UPLOAD>> button under the file number on the Manage Claims screen for the file you wish to place the document in.

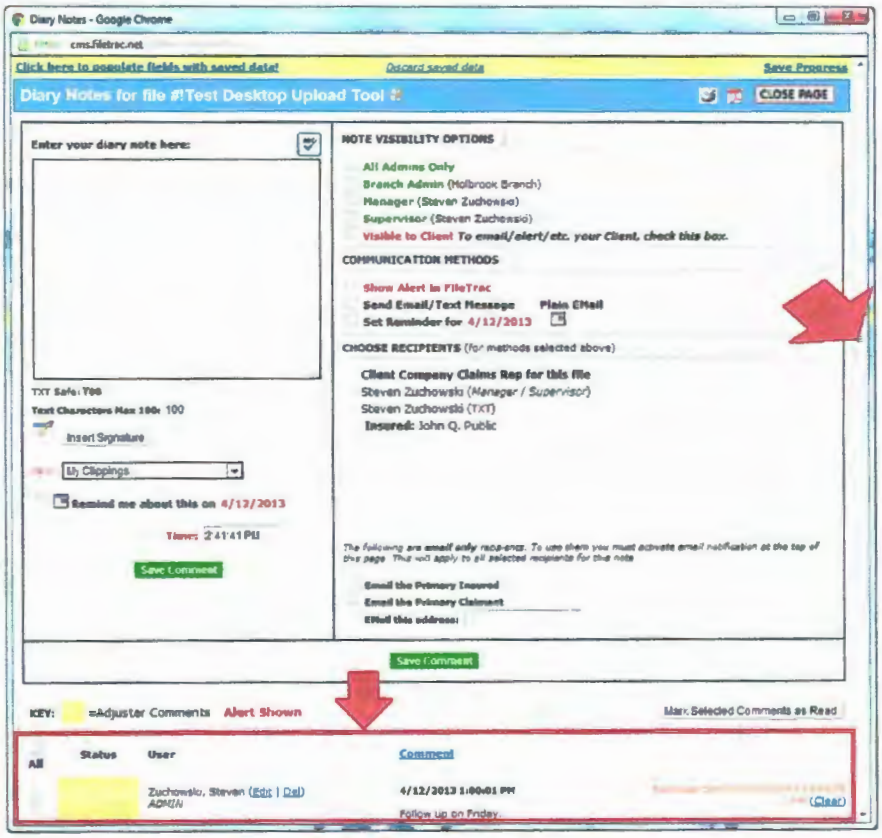


Then click on the dropdown and select what it is you are uploading or keep it selected to **Miscellaneous** (choosing Miscellaneous will use the name of the document based on how you saved it on your computer, and that will be the name of the document once it is uploaded). Browse for your document and double click on it, then click Upload Report.

3) *Notes:* To view Notes simply click on the word **Notes** under the Diary Heading.

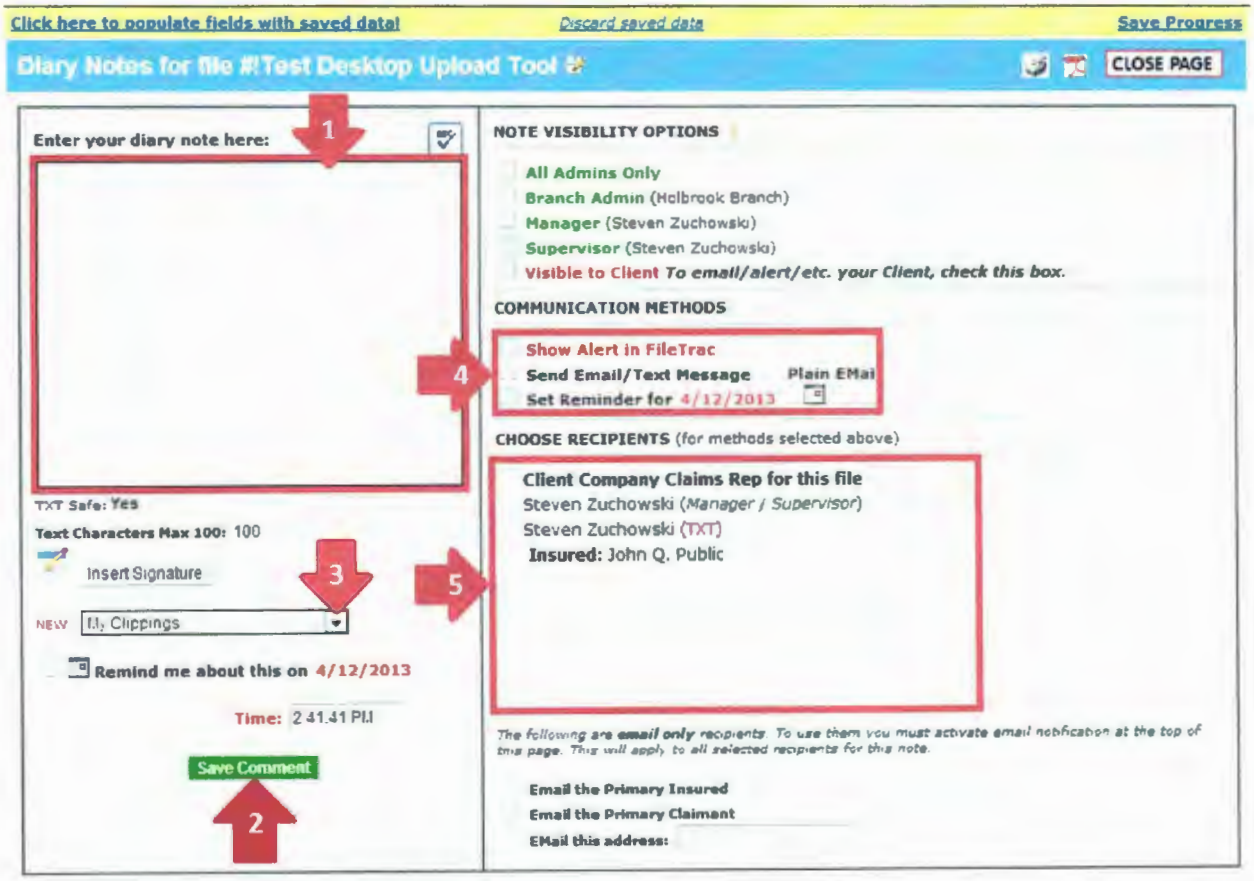


This will open a new window where you can view the notes of a file by simply using the pull down bar on the right hand side of the window, the newest note will be on top.

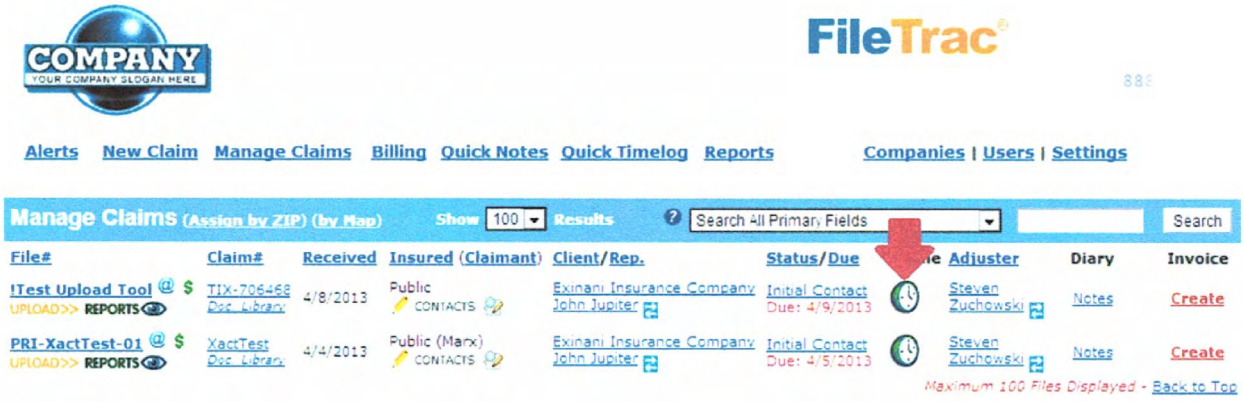


(1) To add a note simply click in the big box on the left hand side, enter your note and then click on the (2) **Save Comment** button. Also notice the (3) **CLIPPINGS** field – you can add/edit as well as use Clippings that were added by your Admin. A clipping is a commonly used statement – used to cut out your duplicate entry and so there is less miscommunication. Make sure you click your mouse in the Diary Notes box then choose the CLIPPING you want. It will auto-fill for you.

To send someone an (4) **Alert and/or Email** enter your comment in the comment box and then on the right hand side you can chose to send an Alert within FileTrac and/or Email, then select the name of the person in the (5) recipient box, then click the (2) **Save Comment** button.

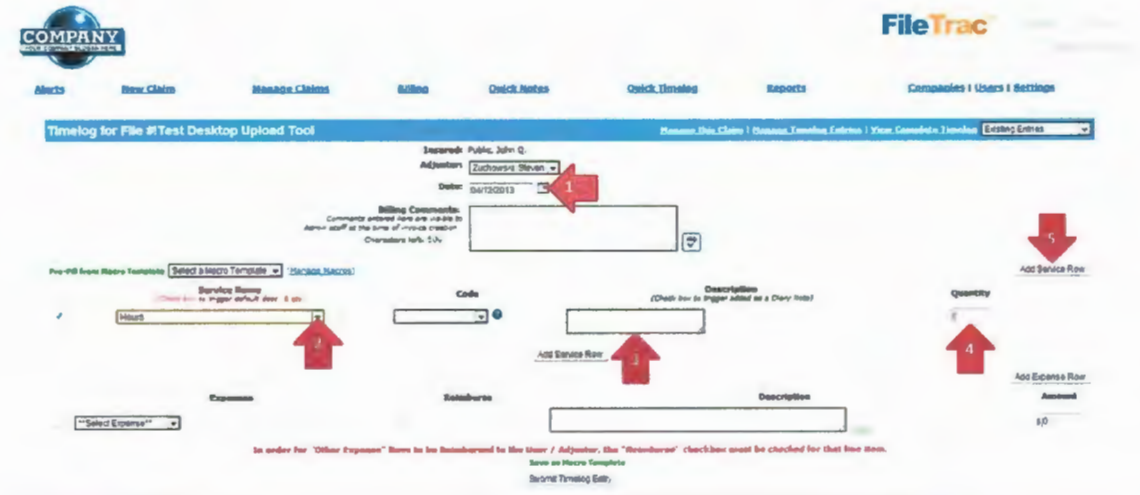


4) *Timelog:* To enter timelog information click on the green clock .



The first thing you will want to do is select the (1) date you performed the service by clicking on the calendar icon and selecting the date (***Note:*** You have the ability to back date the entry to the date you performed the service and it will appear in the timelog in chronological order). Next go to the (2) **Service Name** dropdown and select the service you wish to charge for, then go over to the (3) **Description** box and type in your activity/comment, and then go to the (4) **Quantity** box and enter the quantity you need to charge for this service. If you need to charge for another Service, simply click on the (5) **Add Service Row** and another line will be added in which you can charge for the next service. Also if an Expense Item is needed you will see where you can add **Expenses**. If you paid for the expense item make sure you check the box in the (6) **Reimburse** column or you will not get reimbursed for this item.

Note: Your system may contain (7) Timelog Codes, by selecting these codes you will not have to type in the information as it will auto populate that item and if need be you can add to that code by typing the additional information in the Description box. To see what a Code will auto fill, click on the and this will show you what that code will auto fill in the description for that timelog. Also your Company may have (8) Timelog Macros (Templates), the Timelog Macros if selected will populate Service lines for a particular Service/Activity that is commonly used. When using the Timelog Macros simply put in the Quantity for each service line, and if need add additional information in the description box. Click (9) Submit Timelog Entry when done.


COMPANY
FileTrac
Alerts
New Claim
Manage Claims
Billing
Quick Notes
Quick Timelog
Reports
Companies | Users | Settings
Timelog for File #Test Desktop Upload Tool
Insured: Public, John Q.
Adjuster: Zuchowski, Steven
Date: 04/12/2013
Billing Comments:
Service Name
Code
Description
Quantity
Hours
Add Service Row
Add Expense Row
Expenses
Reimburse
Description
Amount
Select Expense
Save as Macro Template
Submit Timelog Entry
1
2
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4
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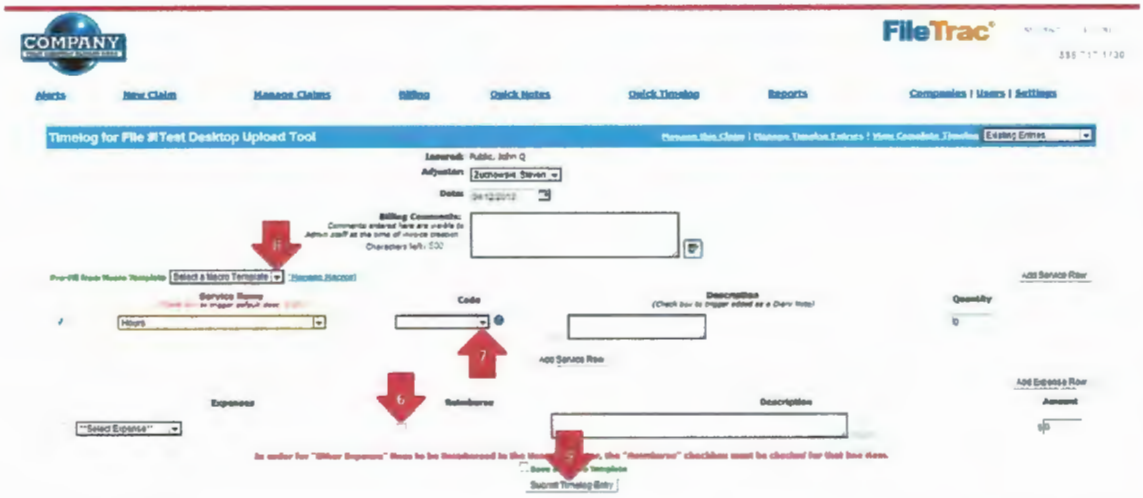
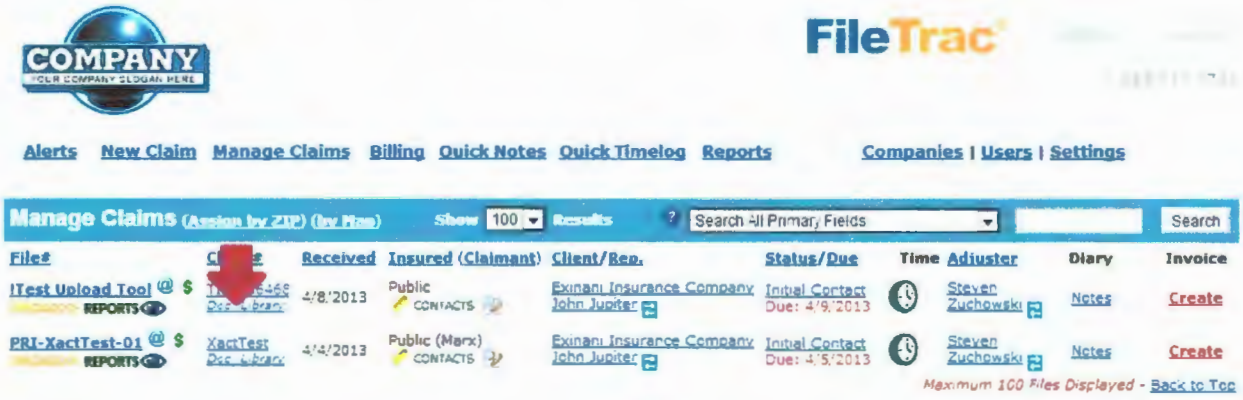
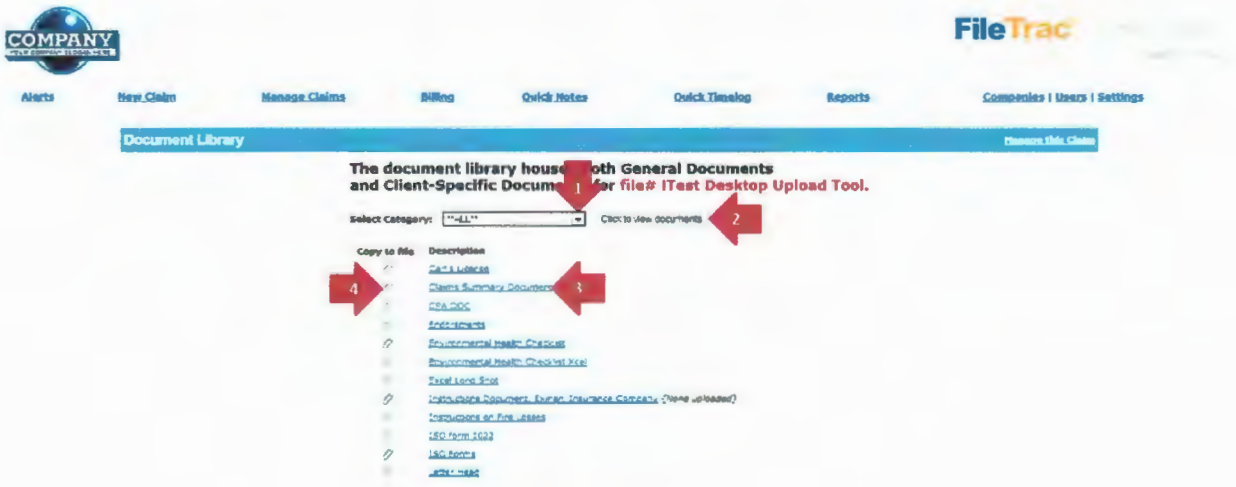

COMPANY
FileTrac
Alerts
New Claim
Manage Claims
Billing
Quick Notes
Quick Timelog
Reports
Companies | Users | Settings
Timelog for File #Test Desktop Upload Tool
Insured: Public, John Q.
Adjuster: Zuchowski, Steven
Billing Comments:
Service Name
Code
Description
Quantity
Hours
Add Service Row
Add Expense Row
Expenses
Reimburse
Description
Amount
Select Expense
Submit Timelog Entry
6
7

5) *Doc Library:* The Doc Library is an area in FileTrac that contains Client Instructions, Forms, Policies and whatever your Company has uploaded for access for their employees. The **Doc Library** link can be found under the **Claim#** while in the Manage Claims screen. To view the documents click on **Doc Library**, this will take you to a different page where it will contain both General Documents as well as Client Specific Documents.



Click on the (1) dropdown to select a category you wish to search for a particular document or simply keep it at All, then click (2) **Click to view documents**. To view any of the documents click on the (3) name of the document and it will produce it in the format that it was loaded in. You have the choice to view it, print it, type in it (if uploaded originally as a Word Doc) or attach it to the file in the Reports area. To put the document in the file you are working on click on the (4) 📎 icon. This will add this document to the Reports area for this file where you can Edit it (if the document is a Word Doc, Excel Doc or a Writeable PDF), Email it to a recipient, or simply have it be part of the file.

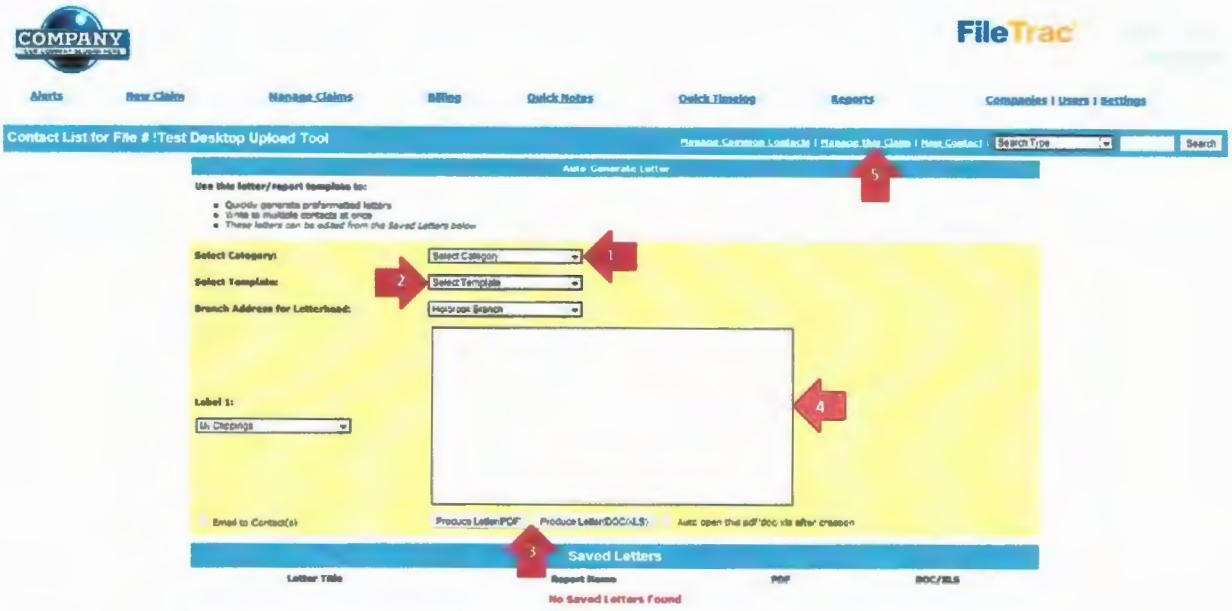


6) *Word/Excel Templates:* The Word/Excel Templates are documents that auto fill claim specific information. These documents can be letters, reports, or forms. To produce these documents click on the CONTACTS under the insured's name for a file.

This will take you to the Contacts area for the file, click on the **Word/Excel Templates** link in the blue bar.

Click on the (1) **Select Category** dropdown and select the Category for the document you wish to produce (in the majority of your systems you will be able to choose from Forms, Letters or Reports). Next click on the (2) **Select Template** dropdown and select the document you wish to produce. If no boxes appear click on the format in which you wish this document to be in, you have the option of (3) **Produce PDF or Produce Word/Excel** (*most of the time I would highly recommend to produce it as a Word or Excel document so if you need to make changes to it you will have the ability to do so*). If (4) boxes appear above the buttons to produce the document in the format you want, there will be labels to the left of each box that will label what you need to type in each box. There is no limitations to the characters that can be entered in these boxes and the text that you enter will auto fill in the document where it needs to appear. IF you need

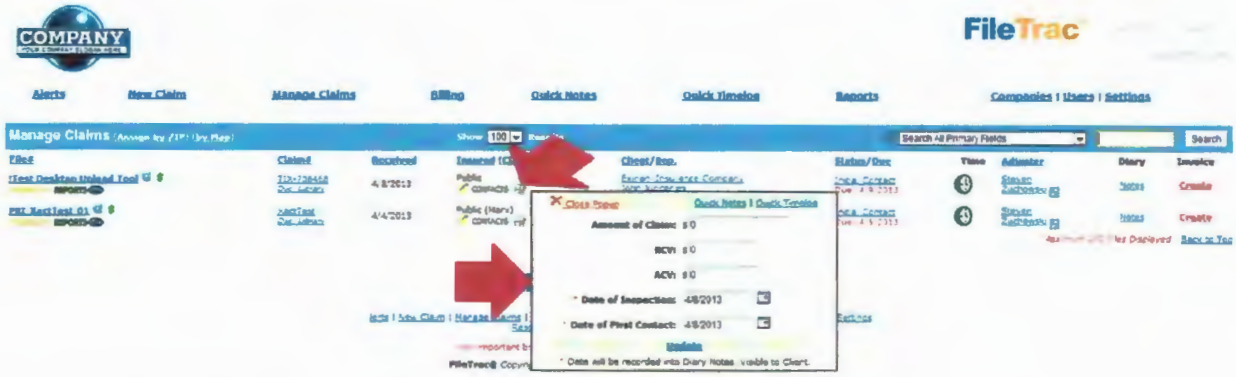
to create another paragraph in the text box simply hit your Enter key a couple of times and then you can proceed in filling in the text box. Now click on the Produce button for the format you wish this document to be in. Once you have produced the document click on the (5) **Manage this Claim** link in the blue bar and it will take you back to the Reports area where you can view this document or edit it.



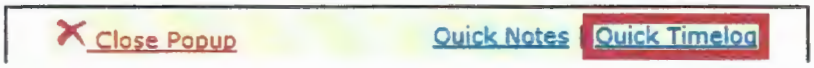
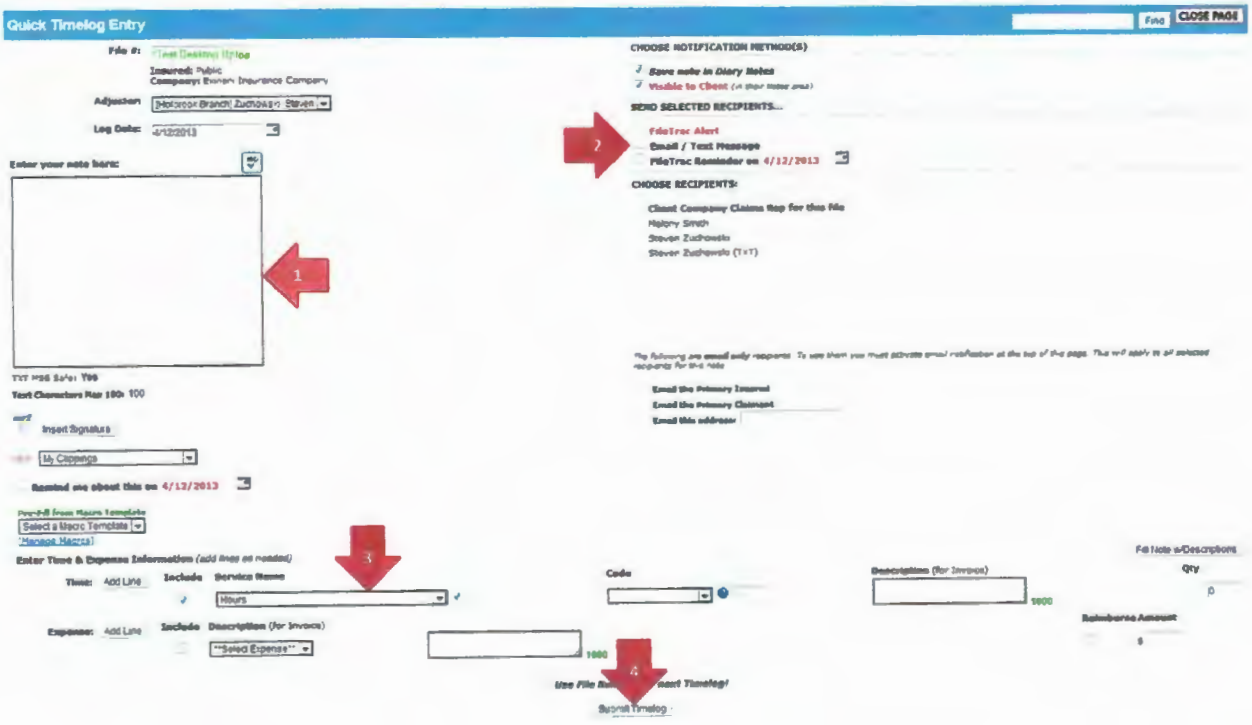
HINT – You can edit a Word Doc without having to Save it to your computer by clicking on the word **EDIT** after the NAME of the Report on the page where you see the list of all reports uploaded. Hover over the "?" for instructions.

7) *Quick Edit Claim:* This icon is located next to the word Contact under the insured's name while in the Manage Claims screen, when you put your cursor on the icon you will get the popup where you can enter several key pieces of information for a claim. You can enter the **Date of First Contact and Date of Inspection** by clicking on the calendar icon for each of them and selecting the date you performed that service, now go to the bottom of the icon and click the Update button. This will keep the dates that you performed those services in the popup and automatically make a note in the file and mark it visible to your client. This popup is to be

used for Fee Schedule claims where you can enter the **Amount of Claim** (the **RCV** estimate without deduction for the deductible or depreciation) and now the system will know what tier to charge the client for this claim.



Also in the popup you will note that there is a link for Quick Timelog.



When you click on that link it will open the Quick Timelog in a separate tab or window where you have the ability to put a (1) note in a file, (2) send an email, communicate with the office in the upper portion and then in the lower portion be able to (3) select services and charge your client for the time & expense that you have on a file, remember to click on the (4) Submit Timelog on the bottom of the page.