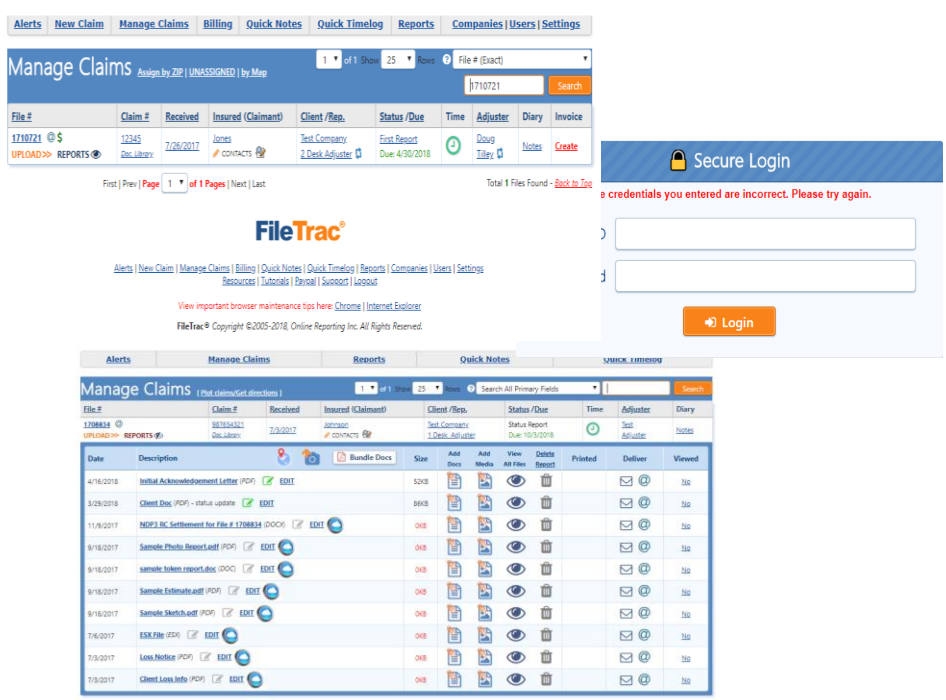
Syndicate

EVERY CLAIM, EVERY TIME

NAVIGATING FILETRAC®



PURPOSE

This resource guide serves as a navigation tool, that will provide new and skilled FileTrac users the necessary information needed in order to complete files with Syndicate Claim Services, Inc.

We hope our efforts prove to be beneficial to you.

Syndicate Claim Services, Inc.
Training Department

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FREQUENTLY ASKED QUESTIONS

**The FAQ's are indicated throughout the guide, by this star symbol ★

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Getting Familiar With FileTrac

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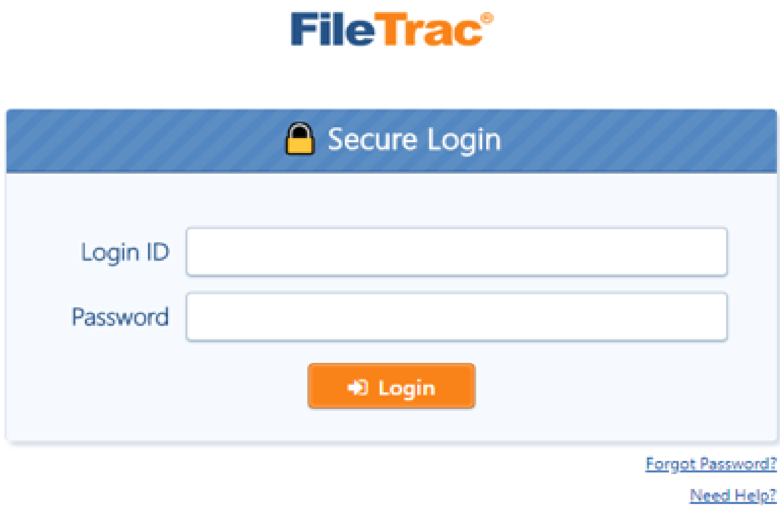
Login Screen



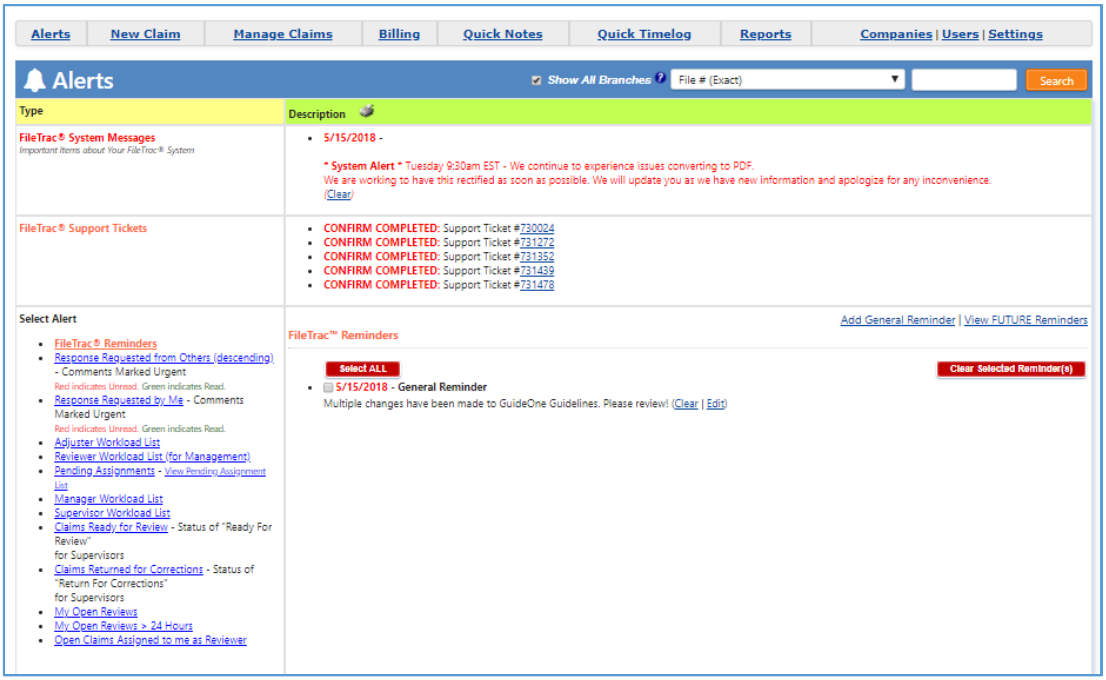
Login ID:

Password:

(Write your Login ID and Password above for safe keeping.)

After entering your login information and selecting Login, you will be taken to the Main Screen/Alert Screen

Main Screen/Alert Screen



FileTrac System Messages – View the box to the right of this section to see any system updates or issues.

FileTrac System Tickets – View the box to the right of this section to track any tickets that you may have turned into Support for system issues.

FileTrac Reminders – These reminders are used to provide you with general information from SCS. By clicking this **red and underlined** phrase, you will be provided any reminders in box to the right of this section. For example, in the screen shown above, a reminder was provided regarding changes that were recently made to a Client's guidelines.

You may remove these reminders by clicking the box(es) on the reminder(s) that you wish to remove, and then click the **Clear Selected Reminder(s)** button on the far right side.

Alerts

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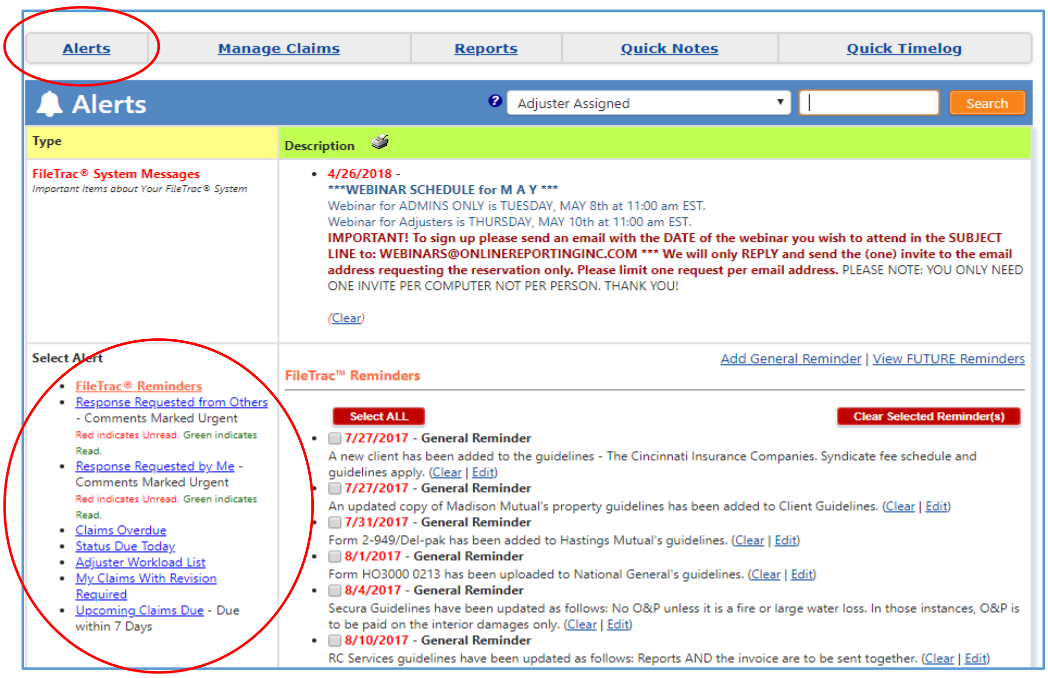
Alert Screen

While in the FileTrac program, if you click the **Alerts** button shown circled below, you will be taken the Alerts Screen. Remember that the Alerts Screen is also the Main Screen which populates after you enter your login.



Alerts – Consider your alerts as your menu to manage your files. This menu provides you with items needed on a claim, claims overdue, alert you that a status is due, and provide you with a breakdown of your workload as well as other items.

Response Requested from Others – This is where you will find alerts that were sent to you from others, ie: Manager, Supervisor, Reviewer, etc

Claims Overdue - Lists claims overdue.

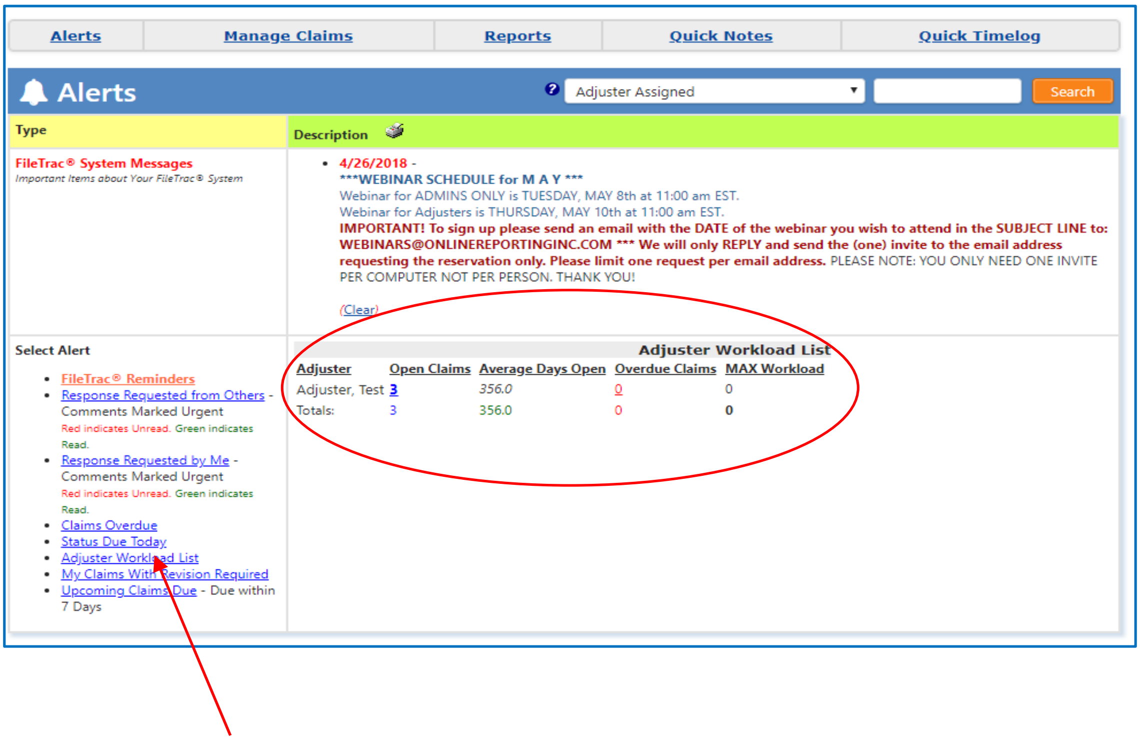
Status Due Today - Lists claims that require a status update or action on the claim.

Adjuster Workload List - Shows open claims, average days open, overdue claims and MAX Workload.

My Claims with Revision Required- If a Reviewer kicks back a claim for revision, you will find it here.

Upcoming Claims Due - Claims with items due within 7 days.

By clicking the red or blue and underlined Alert on the left side on the Alerts Screen, the corresponding Alert will open in the area to the right.



The Alert Screen above shows that the Adjuster Workload List alert was clicked, expanding the adjuster's workload in the larger box to the right as shown on the previous page.

By clicking the blue underlined number above under **Open Claims**, you will then be taken to your open claims on the Manage Claims Screen as shown below. (Note that the **Overdue Claims** are in red. You may also click the red underlined number here to be taken to your overdue claims on the Manage Claims Screen.

Manage Claims Screen

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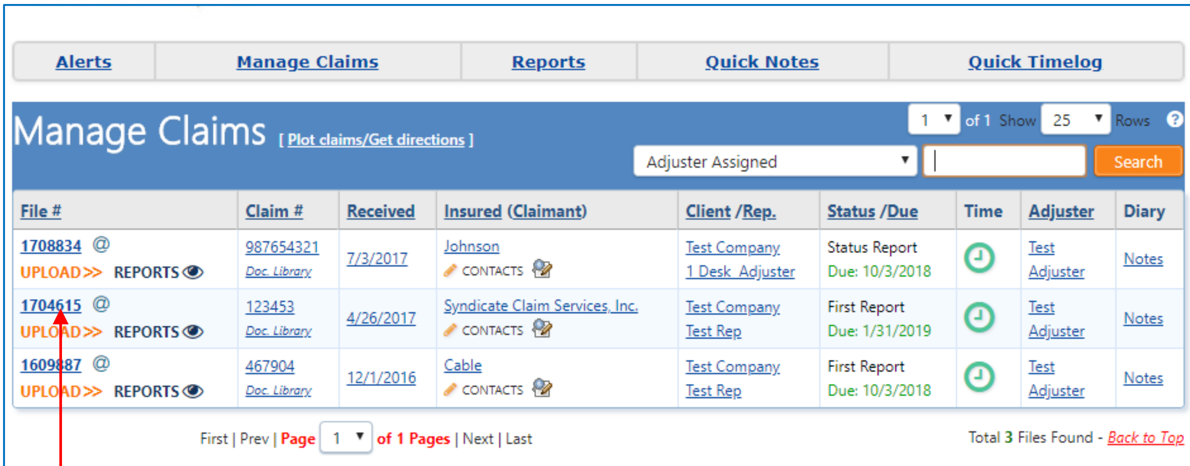
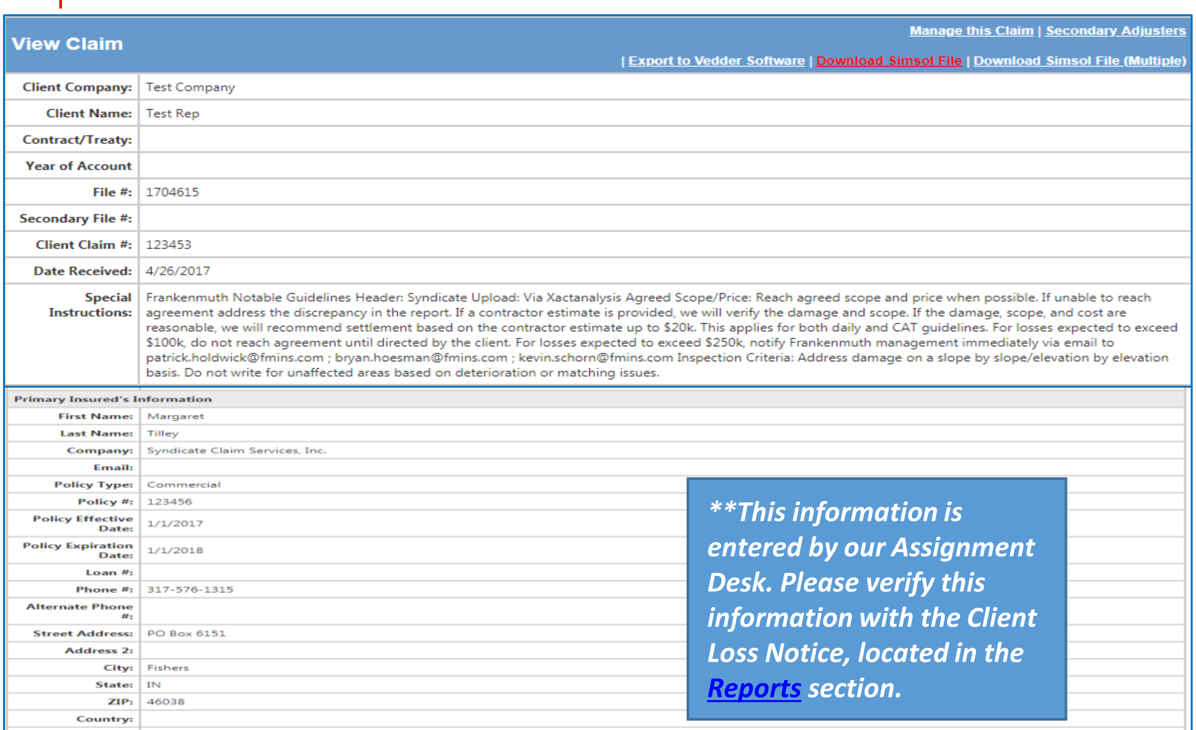
EVERY CLAIM, EVERY TIME

Manage Claims Screen

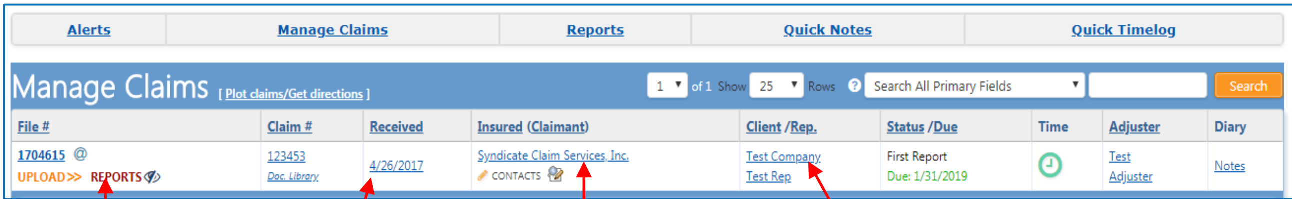


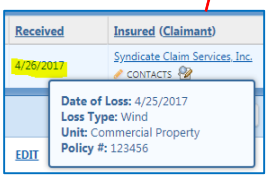
Click the blue underlined file number and you will be taken to the **View Claim** screen. This will show you the claim information, such as; Special Instructions, Insured information, and Loss Location.



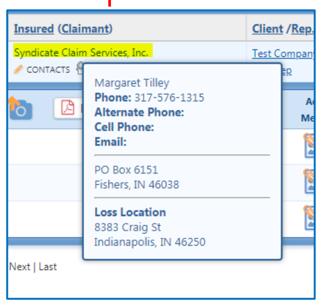
Manage Claims Screen

From the Manage Claims Screen, you can also Hover over the blue underlined to find more information

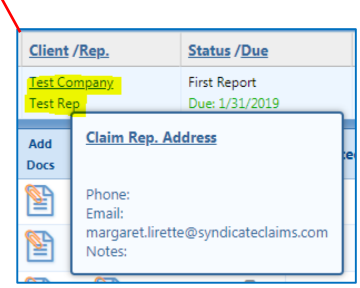




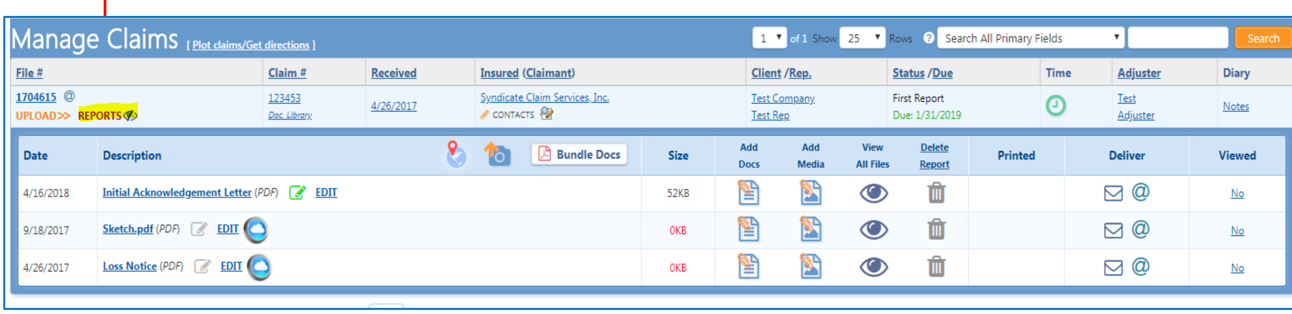
Hovering over the date received will open a box describing the loss.



Hovering over the Insured's name will open a box with the Insured's information, including the loss location.



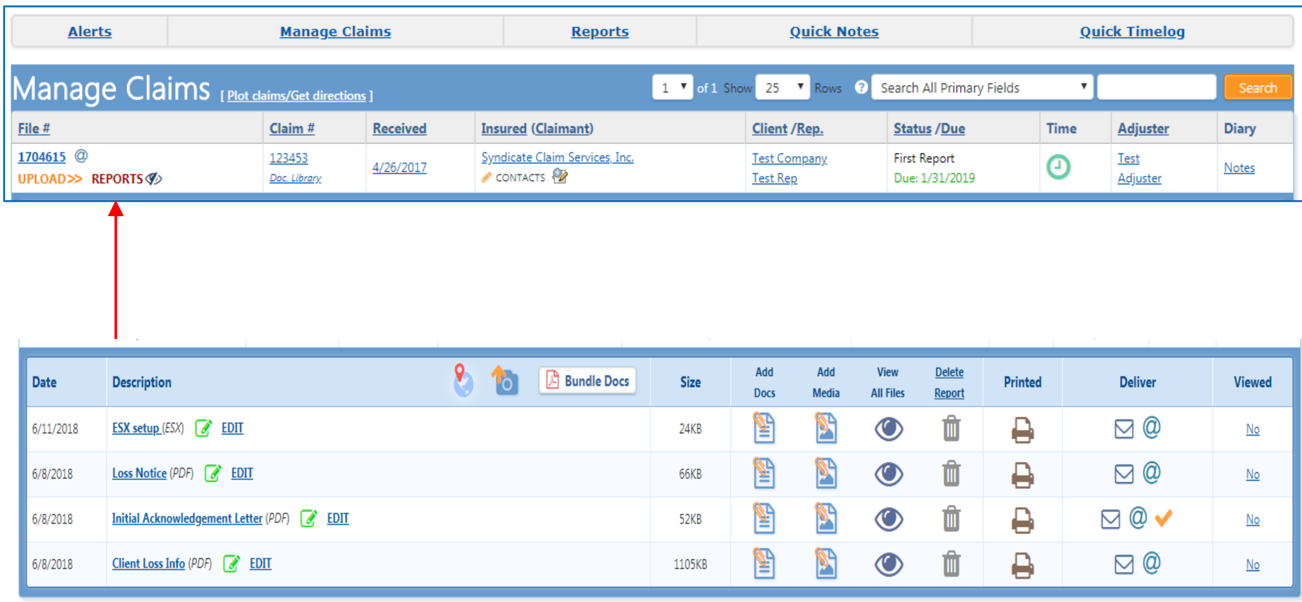
Hovering over the Client/Rep will open a box with the Desk Adjuster's information, including their phone number.



Clicking on **Reports** will show what reports are in the file. On the next page, you will learn what you should find in the Reports section of the file.

File Documents – What Should be in Your Claim

On the Manage Claims Screen, you will click on **Reports** to find documents that have been added to the file. You should always find the **Client Loss Notice, ESX Set Up, Loss Notice and an Initial Acknowledgement Letter.**



ESX Setup – One of the Admin team members set up an ESX file for you. It includes the basic Insurance information. Please see the separate ESX setup video for instructions on how to download this file.

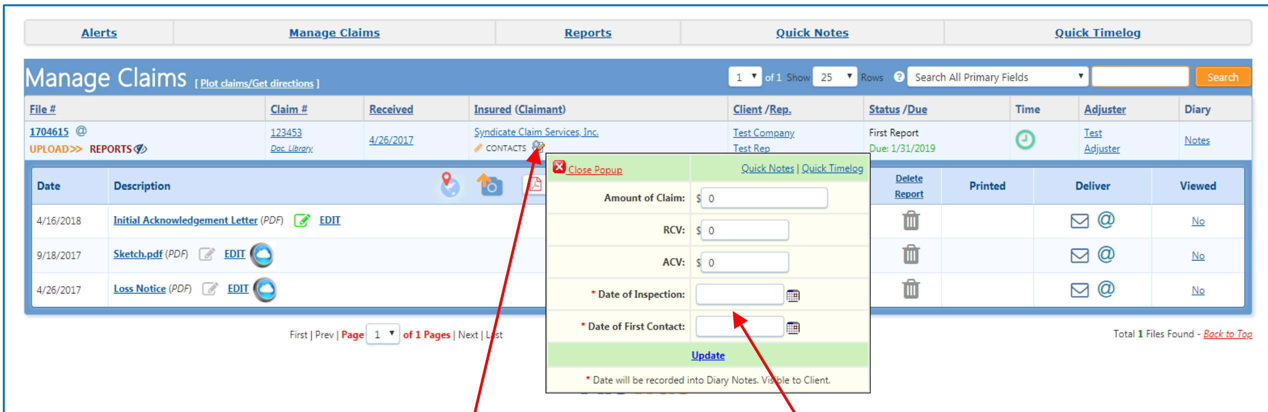
Loss Notice– This is the loss notice that is created by the admin staff in FileTrac. It is the information they enter into FileTrac based on the Client Loss Notice.

Initial Acknowledgement Letter- This is created by FileTrac when you, the adjuster, is assigned the claim. It is a letter that states you are the adjuster and is sent to the Desk Adjsuter.

Client Loss Notice- This is the information sent by the Desk Adjuster. It will include the policy information and dec pages. It has all of the claim information. **IT IS VERY IMPORTANT TO CHECK THE CLIENT LOSS NOTICE ON EVERY CLAIM!!**

Entering Contact/Inspection Dates

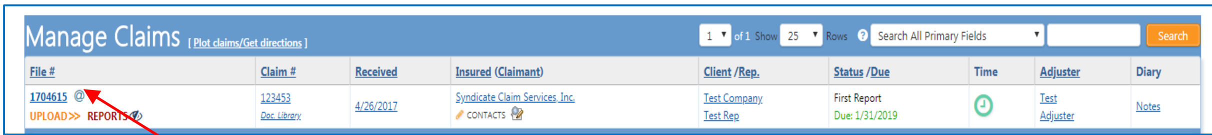
On EVERY claim, we need to enter our contact/inspection date. Make sure to set the contact date on the date you make actual contact with the insured.

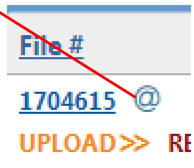


From the Manage Claims screen, **hover** over the magnifying glass icon 

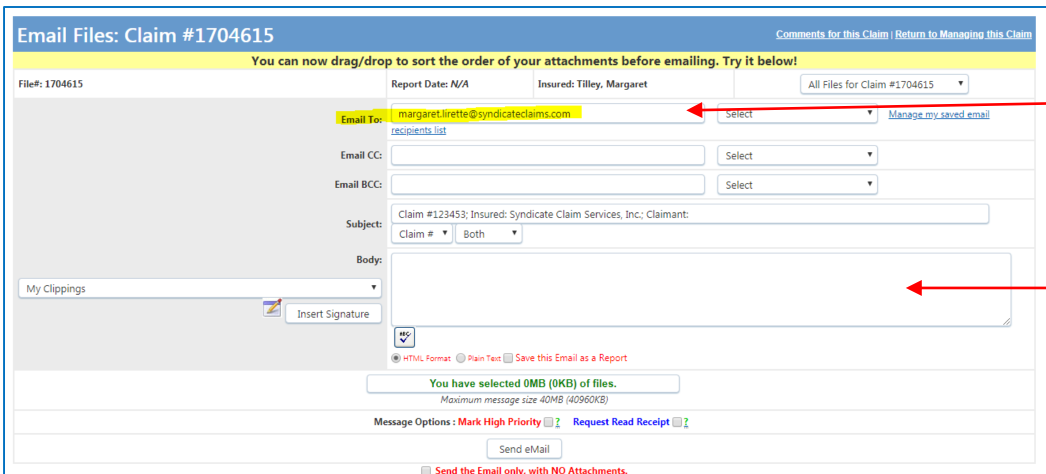
Enter Inspection/Contact date here. You can do this by clicking the calendar icon or manually entering the dates.

Sending Emails Through the File





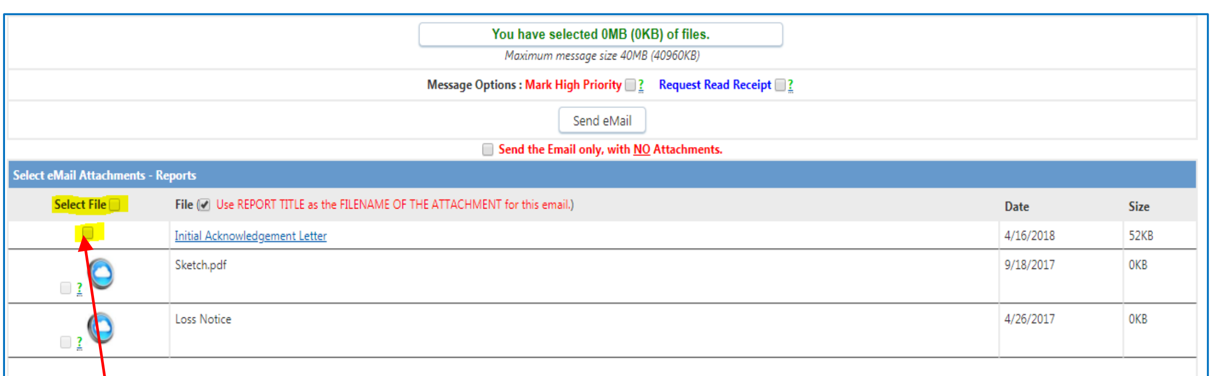
To send an email through the file, click on the @ symbol.



The Desk Adjuster's email will auto populate in the *Email To* box

The Subject will have the Claim # and the Insd's Name.

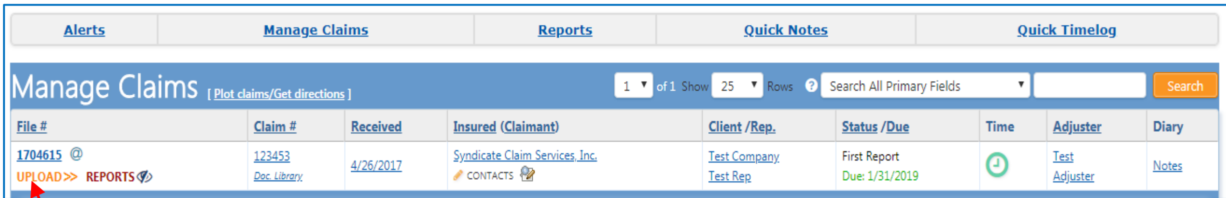
If you **do not** want to add any attachments, click the box that states, Send the Email only.

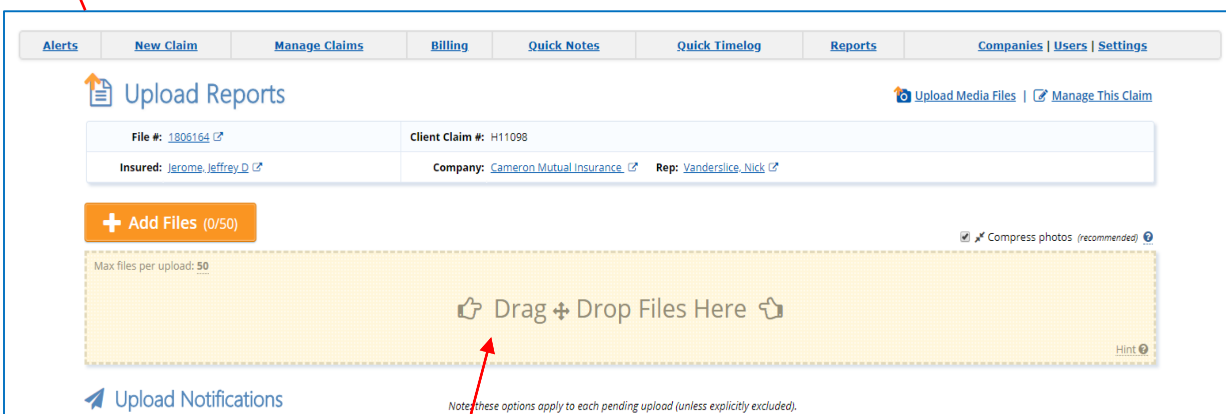


If you **do** want to add any attachments, that are uploaded to the file, to the email select the documents and then hit Send Email.

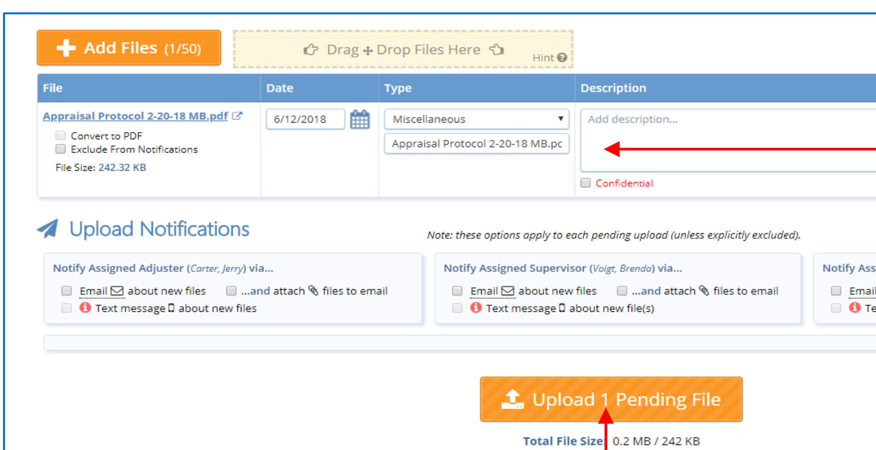
Upload Documents into FileTrac

In FileTrac, there is a way to upload documents into the file. You will want to upload any documents you receive from the DA, the contractor, the insured, etc





You can drag and drop the document you are wanting to upload, from your desktop straight to the upload box.

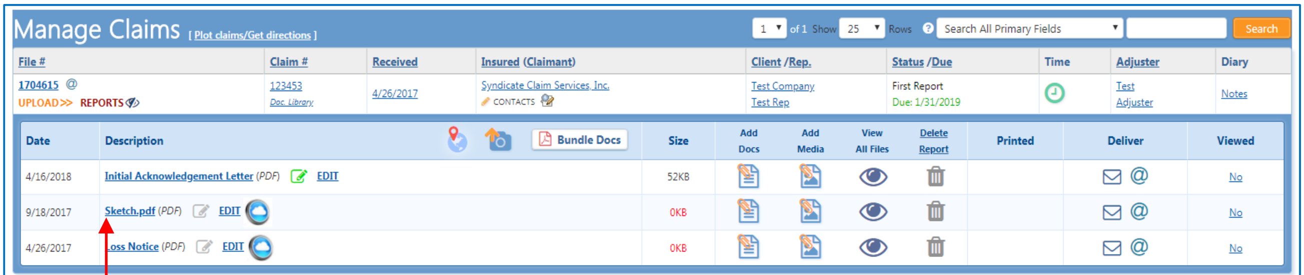


Click here to change the title of your document.

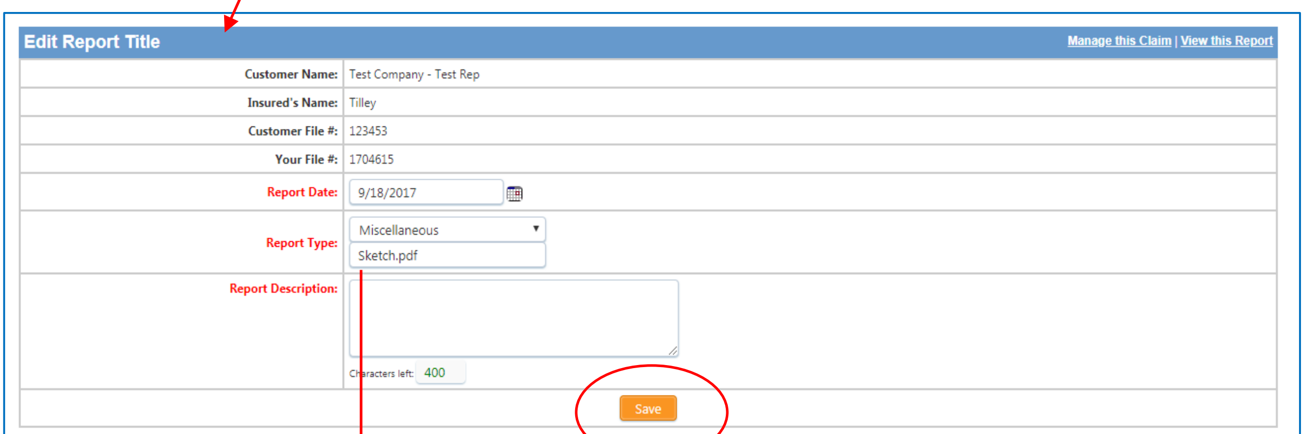
You can upload more than one document at a time. Once you have uploaded and named all of your documents, click the Upload Pending File to finalize the upload

Changing Document Titles in FileTrac

Once you have uploaded the documents, you will find them in the **Reports** section of the Manage Claims Screen.



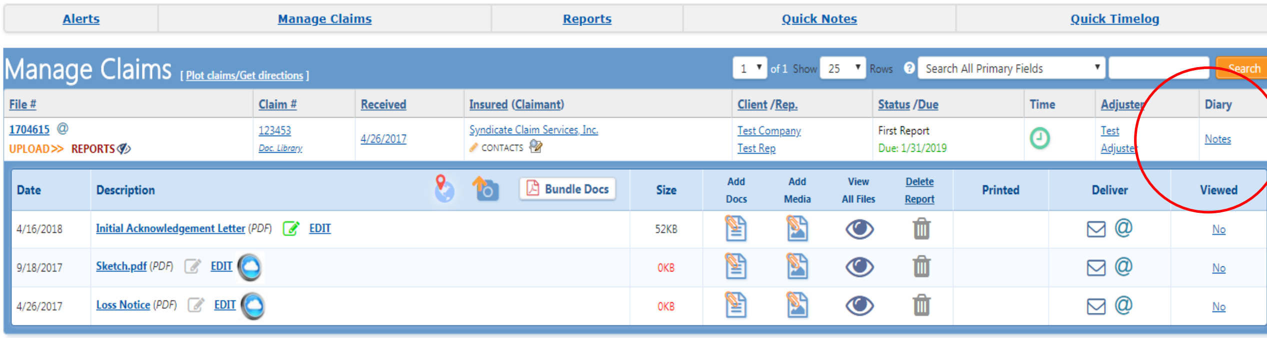
Let's say you need to change the title of a document you uploaded. Click on the blue underlined document . This will bring you to the Edit Report Title screen.



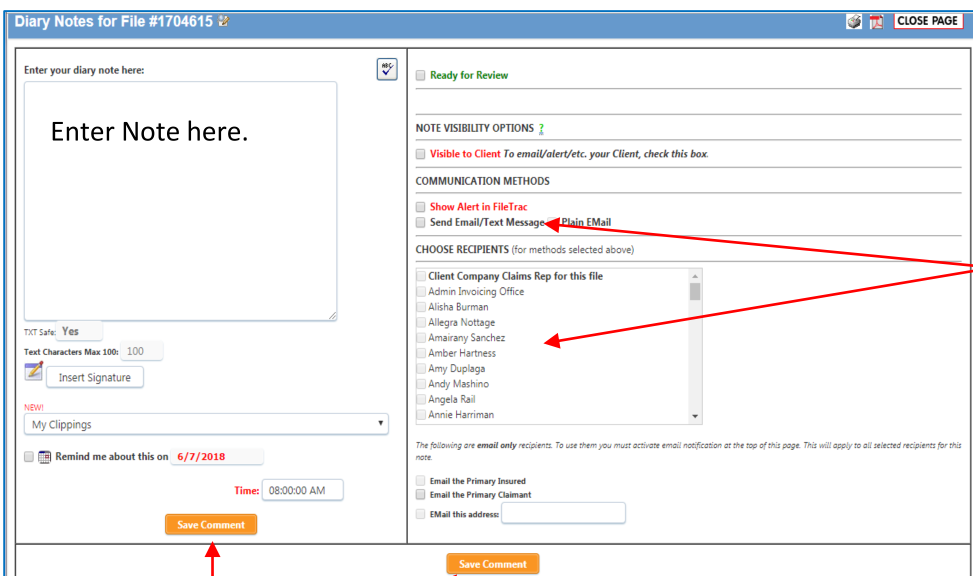
Simply change the name under the

Report Type and click Save

Diary Notes Screen



Diary Notes are used to keep the file updated. Whenever you receive a call, email, or text from the insured, contractor, DA, etc use the Diary Notes section to keep the file up to date. This allows the Claim Manager/Supervisor to keep track of the file.



If you need to send your note as an email, you will check the Send Email/Text box. Then check the box next to the person you are sending the email to. Then hit the **Save Comment** to send.

If you do not need to send the note as an email, simply **Save Comment.**

Things to Remember:
Please be sure to use appropriate language when leaving a note.
If it is an Xactanalysis claim, be sure to insert your note in **both** XA and FileTrac.

Submitting File for Review

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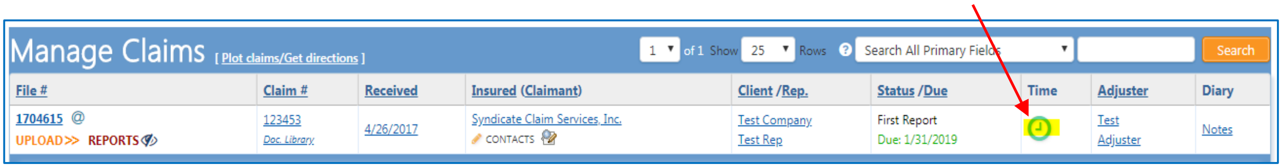
Enter Time and Expense

ALWAYS CHECK THE CLIENT GUIDELINES PRIOR TO ENTERING T&E. NOT ALL CLIENTS BILL T&E!

After checking the client guidelines, below are the instructions for entering T&E. There is a sample T&E in the *Doc Library*.

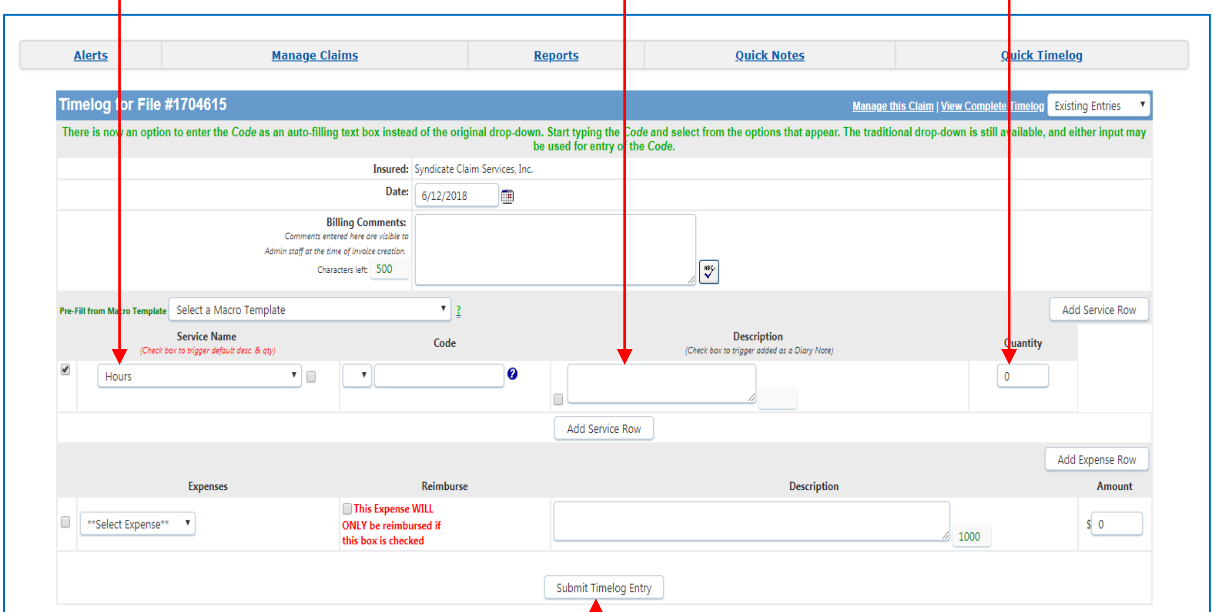
1. Click on the Clock



2. Make sure to enter your time as **Hours**

3. You MUST have a Description for every time entered.

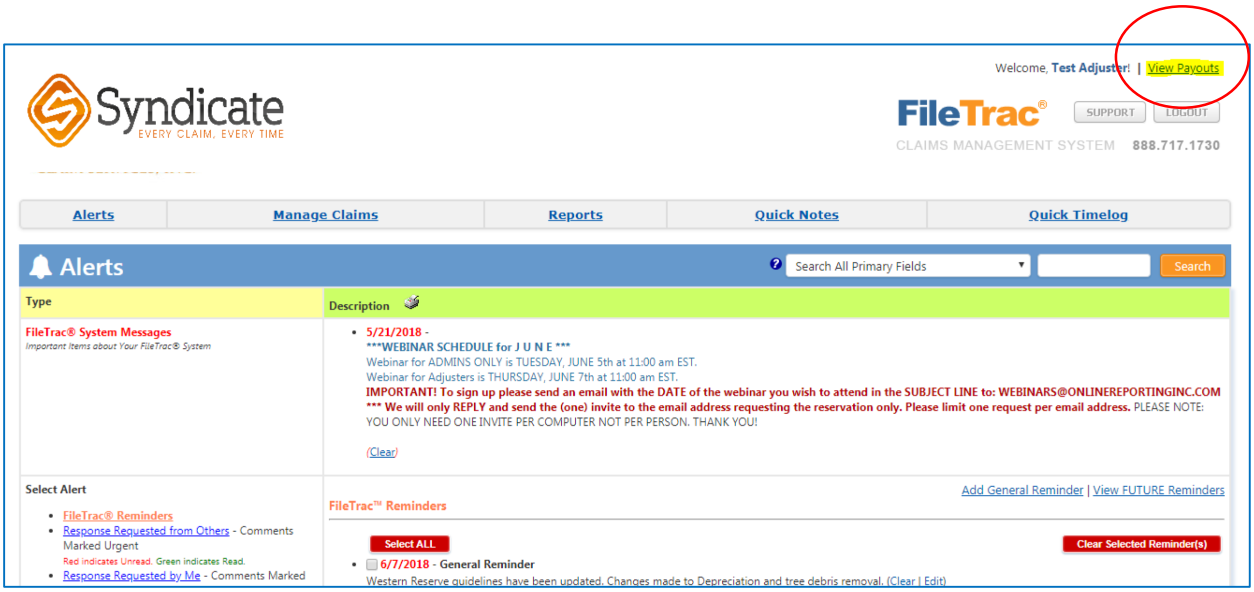
4. Amount of time spent on each item is entered here

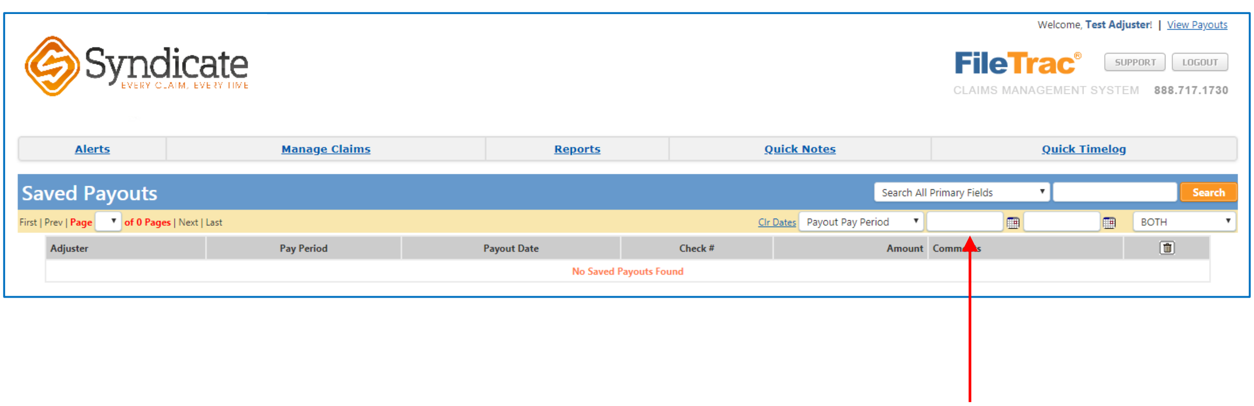


5. Once you have entered your time information, click Submit Timelog Entry. This will save your T&E.

View Payout

To view your payout, log in to FileTrac. From the home screen, you will click View Payout from the top corner.





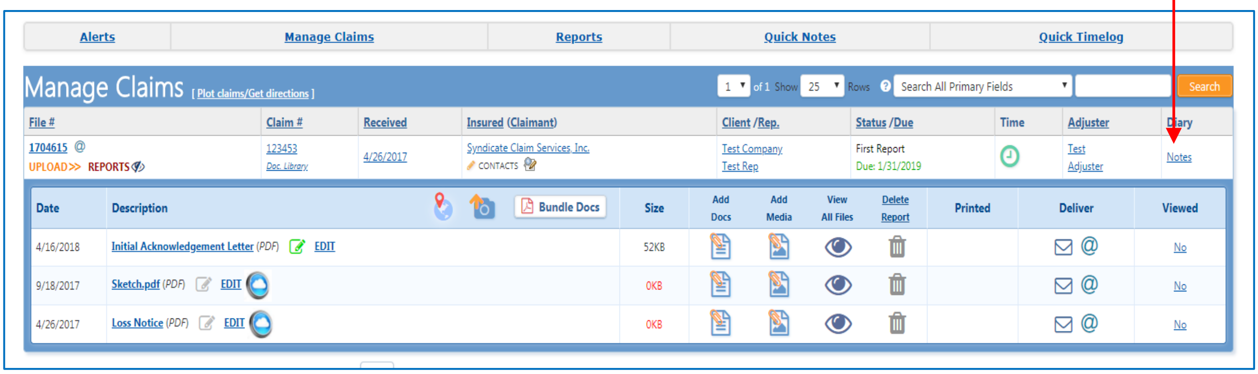
You can look at previous payouts by changing the date, here.

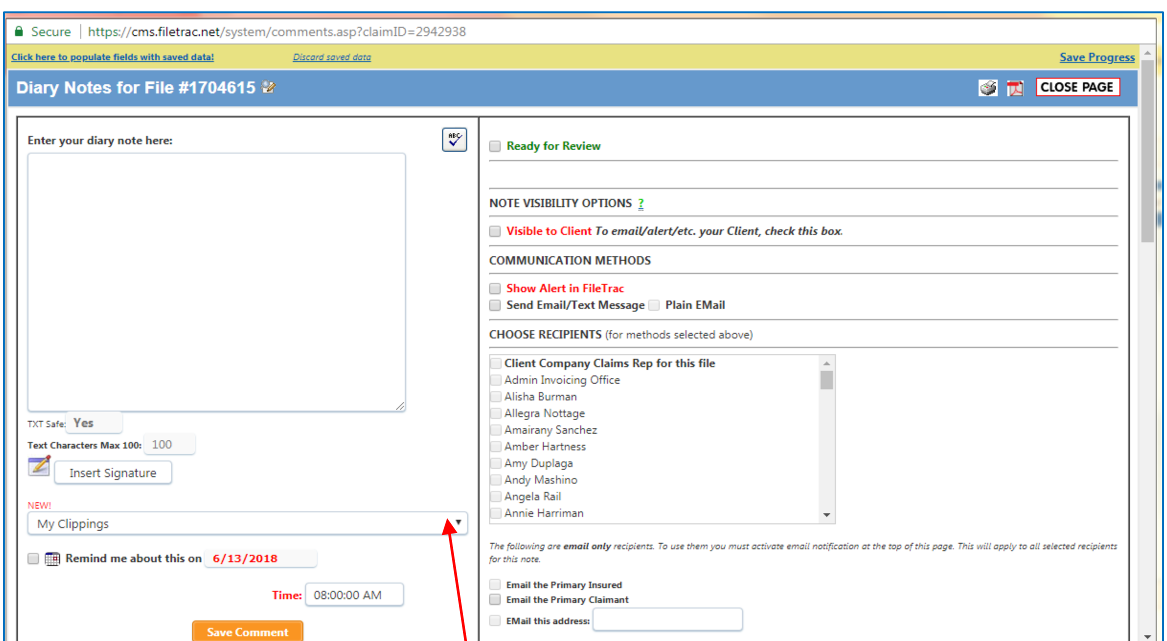
Submitting a File for Review

Whether it be to close a claim, or submit a status report, we use note clippings to do so. You'll want to choose either **the client specific clipping** when closing the file, or **Adjuster Status Report Submission** to submit a status report.

Below are the steps on how to send a clipping.

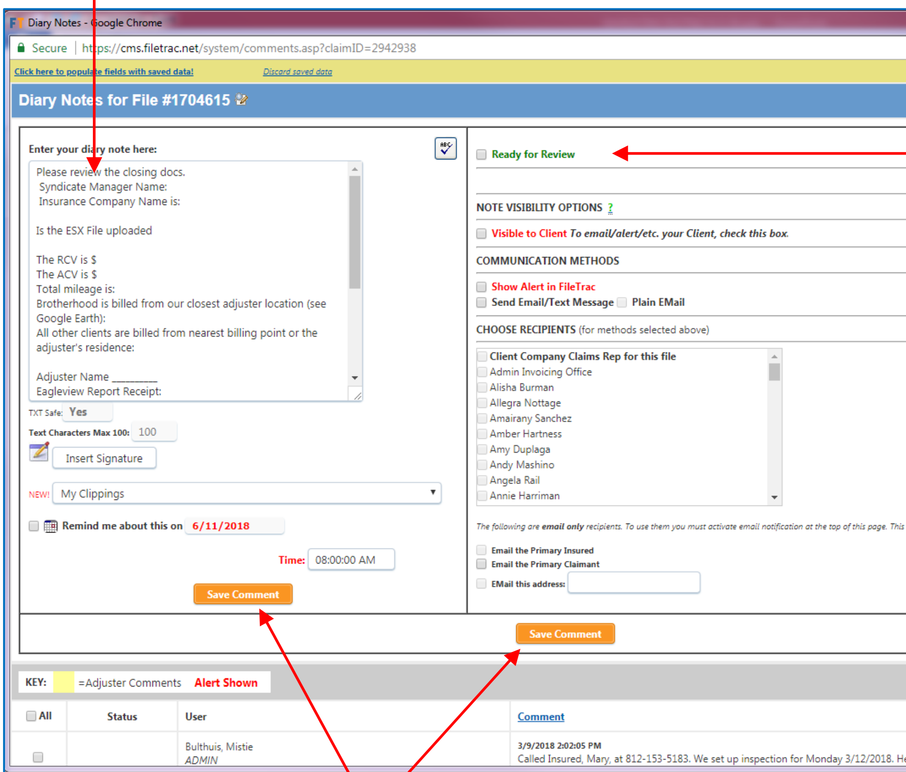
1. From the Manage Claims Screen, Click on Notes





2. Click on dropdown "*My Clipping*" and choose which clipping you need. Remember, if you are submitting for final review, you'll want to choose the **client specific clipping.** Otherwise, choose **Adjuster Status Report Submission.**

3. Fill out the template with the information from your claim.



4. Check the Ready for Review box. This will put your claim into the Reviewers Queue.

5. Click either of the Save Comment boxes to save your clipping.

Document Library

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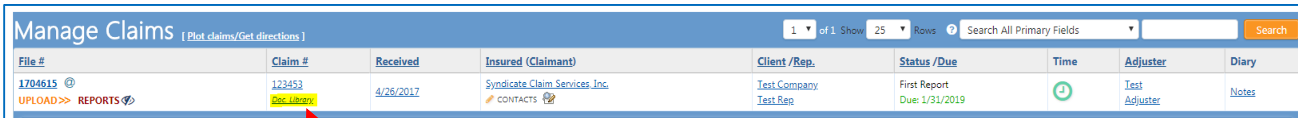
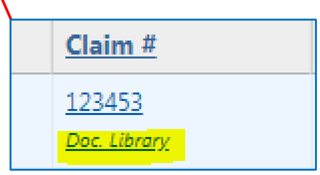
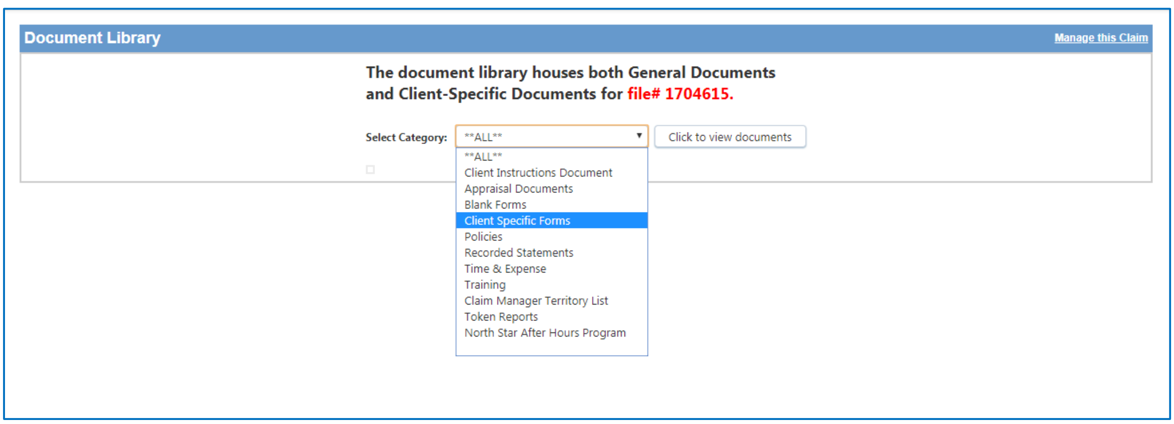
Document Library

The Document Library houses all of our client specific documents such as a non-waiver, guidelines, fee schedule, and training material. You should look at the client guidelines on every claim.





You'll find the doc library under the Claim # in the Manage Claims screen



Below are commonly used categories:

Client Specific Forms: This is where you will find Client Guidelines and Fee Schedule

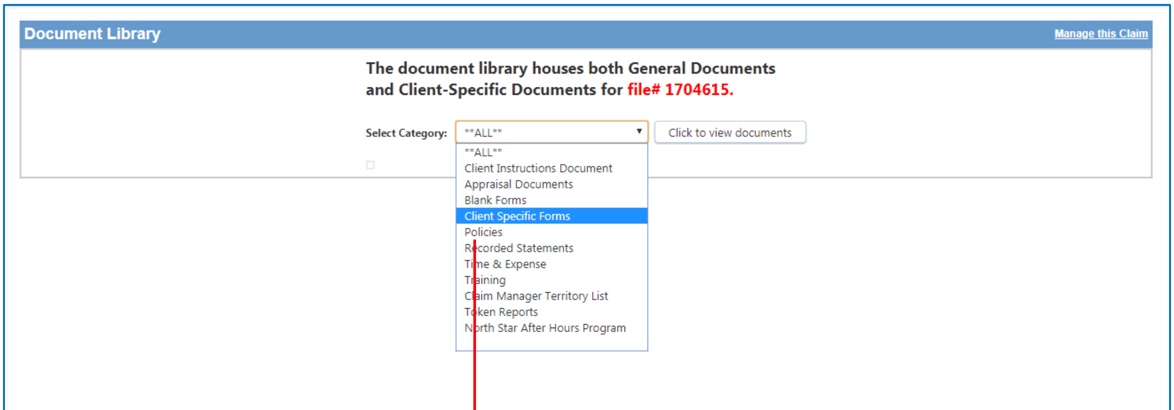
Training: This is where you will find training material. Including this reference guide.

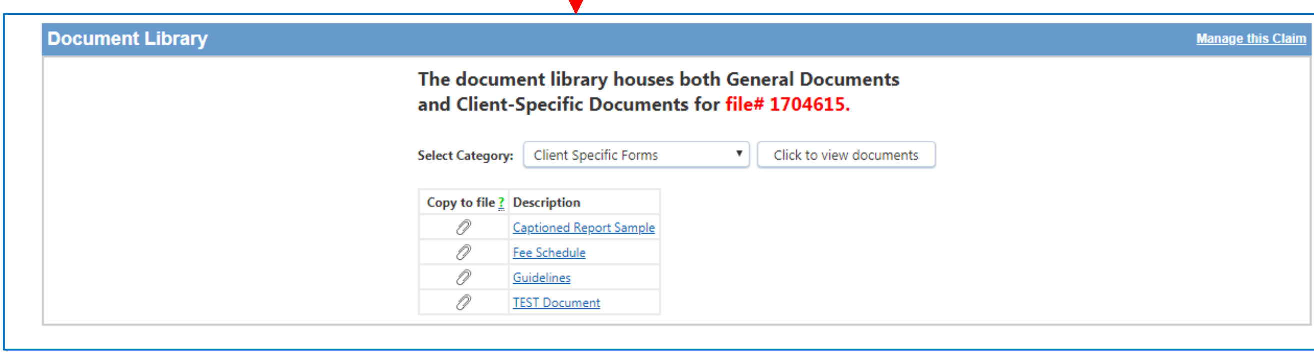
Token Reports: This is where you will find a copy of the token reports, as well as instructions on how to use them. We will take a closer look into Token Reports in the Xactanalysis videos.

Let's take a closer look at the Client Specific Forms

Client Specific Forms

After clicking on the Doc Library under the Manage Claims Screen, you will want to choose Client Specific Forms to find the Guidelines, Fee Schedule and Non-Waiver

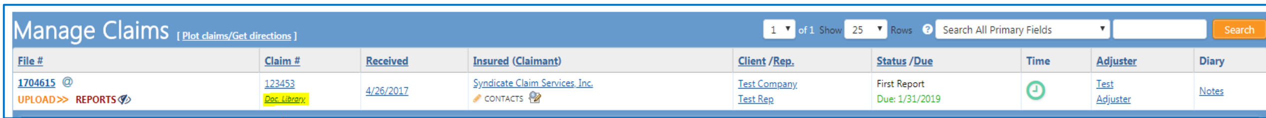




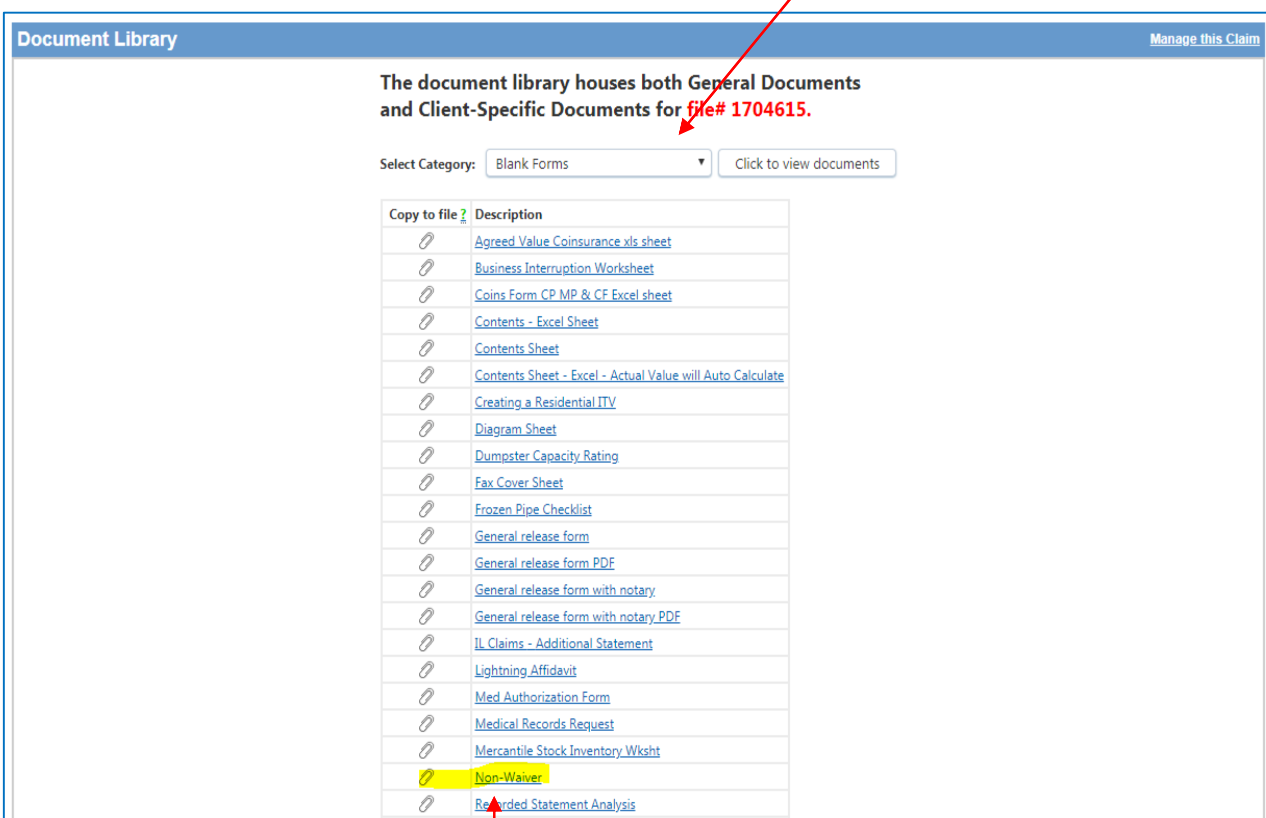
To expand each item, simply click on the blue underlined word. **IT IS VERY IMPORTANT TO CHECK COMPANY GUIDELINES ON EACH CLAIM!!**

Non-Waiver Form

The non-waiver agreement is signed by the policyholder; its purpose is to protect the insurer. Insurer reserves all of its rights under the policy to investigate and defend a claim without admission of any liability for loss. This is found in the Doc Library.



After selecting Doc Library, you will select the category **Blank Forms.**



Once you click on the blue underlined Non-Waiver you can save it and you will want to print it out to take with you to the inspection.