



Syndicate

EVERY CLAIM, EVERY TIME

NAVIGATING FILETRAC

Alerts | New Claim | Manage Claims | Billing | Quick Notes | Quick TimeLog | Reports | Companies | Users | Settings

Manage Claims Assign by ZIP | UNASSIGNED | by Map

1 of 1 Show 25 Rows File # (Exact) Search

File #	Claim #	Received	Insured (Claimant)	Client / Rep.	Status / Due	Time	Adjuster	Diary	Invoice
1710721	12345	7/26/2017	Jones	Test Company	First Report Due 4/30/2018				

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Total 1 Files Found - [Back to Top](#)

FileTrac®

Alerts | New Claim | Manage Claims | Billing | Quick Notes | Quick TimeLog | Reports | Companies | Users | Settings
Resources | Tutorial | Payroll | Support | Logout

[View important browser maintenance tips here: Chrome | Internet Explorer](#)

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Secure Login

credentials you entered are incorrect. Please try again.

Login

Alerts | Manage Claims | Reports | Quick Notes

Manage Claims (edit claims/Get directions)

1 of 1 Show 25 Rows Search All Primary Fields Search

Date	Description	Bundle Docs	Size	Add Docs	Add Media	View All Files	Delete Report	Printed	Delivery	Viewed
4/16/2018	Initial Acknowledgement Letter (PDF)	EDIT	52KB							No
3/29/2018	Client Doc (PDF) - status update	EDIT	86KB							No
11/9/2017	NOP1 RC Settlement for File # 1708834	EDIT	0KB							No
9/18/2017	Sample Photo Report.pdf (PDF)	EDIT	0KB							No
9/18/2017	Sample Taken report.doc (DOC)	EDIT	0KB							No
9/18/2017	Sample Estimate.pdf (PDF)	EDIT	0KB							No
9/18/2017	Sample Sketch.pdf (PDF)	EDIT	0KB							No
7/6/2017	ESK File (PDF)	EDIT	0KB							No
7/3/2017	Loss Notice (PDF)	EDIT	0KB							No
7/3/2017	Client Loss Info (PDF)	EDIT	0KB							No

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



Getting Familiar **With FileTrac**



Login Screen

A screenshot of the FileTrac login interface. It features a blue header bar with a lock icon and the text "Secure Login". Below this, there are two white input fields: "Login ID" and "Password". An orange "Login" button with a right-pointing arrow is positioned below the password field. The entire form is set against a light blue background.

[Forgot Password?](#)

[Need Help?](#)

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

The screenshot displays the 'Alerts' section of the software interface. At the top, there is a navigation bar with various menu items. Below this, the 'Alerts' header is followed by a search bar and a 'Show All Branches' link. The main content area is divided into three sections: 'FileTrac System Messages', 'FileTrac Support Tickets', and 'FileTrac Reminders'. Each section contains a list of items and a description. The 'FileTrac Reminders' section includes a 'Select ALL' button and a 'Clear Selected Reminder(s)' button.

Type	Description
FileTrac System Messages <i>Important Items about Your FileTrac System</i>	<ul style="list-style-type: none"> 5/15/2018 - <ul style="list-style-type: none"> * System Alert * Tuesday 9:30am EST - We continue to experience issues converting to PDF. We are working to have this rectified as soon as possible. We will update you as we have new information and apologize for any inconvenience. Clear
FileTrac Support Tickets	<ul style="list-style-type: none"> CONFIRM COMPLETED: Support Ticket #730024 CONFIRM COMPLETED: Support Ticket #731272 CONFIRM COMPLETED: Support Ticket #731352 CONFIRM COMPLETED: Support Ticket #731439 CONFIRM COMPLETED: Support Ticket #731478
Select Alert <ul style="list-style-type: none"> FileTrac Reminders Response Requested from Others (descending) - Comments Marked Urgent <i>Red indicates Unread. Green indicates Read.</i> Response Requested by Me - Comments Marked Urgent <i>Red indicates Unread. Green indicates Read.</i> Adjuster Workload List Reviewer Workload List (for Management) Pending Assignments - View Pending Assignment List Manager Workload List Supervisor Workload List Claims Ready for Review - Status of "Ready For Review" for Supervisors Claims Returned for Corrections - Status of "Return For Corrections" for Supervisors My Open Reviews My Open Reviews > 24 Hours Open Claims Assigned to me as Reviewer 	FileTrac Reminders Add General Reminder View FUTURE Reminders <div> Select ALL Clear Selected Reminder(s) </div> <ul style="list-style-type: none"> <input type="checkbox"/> 5/15/2018 - General Reminder Multiple changes have been made to GuideOne Guidelines. Please review! Clear Edit

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.

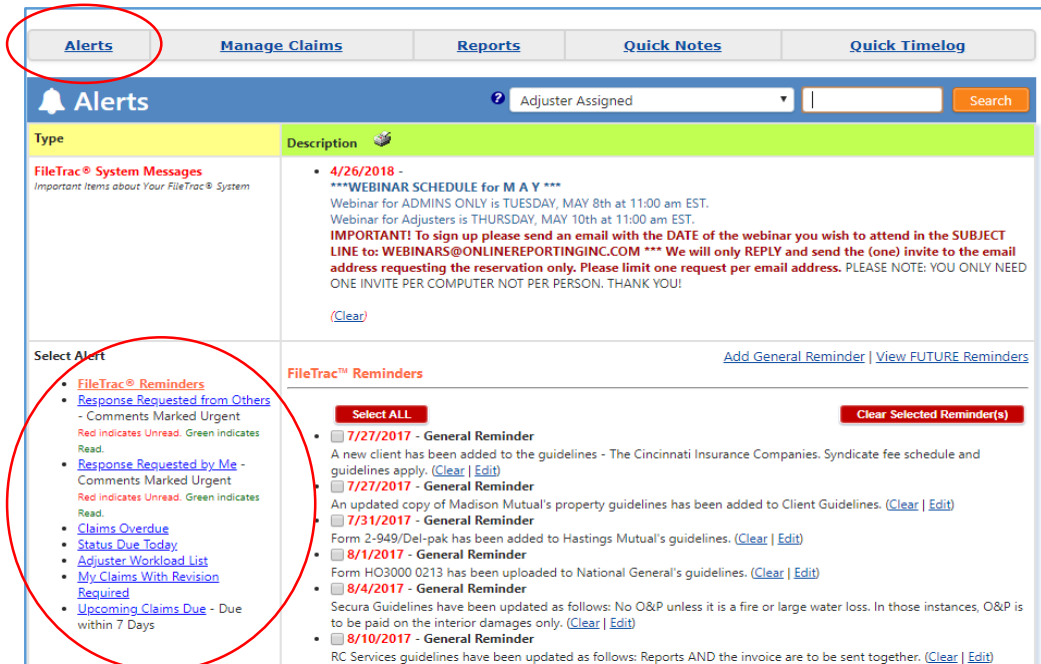
You may remove these reminders by clicking the box(es) on the reminder(s) that you wish to remove, and then click the **Clear Selected Reminder(s)** button on the far right side.

Alerts



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 screenshot shows the Alerts screen with a navigation bar at the top containing 'Alerts', 'Manage Claims', 'Reports', 'Quick Notes', and 'Quick Timelog'. Below the navigation bar is a search bar with the text 'Adjuster Assigned' and a 'Search' button. The main content area is divided into two columns: 'Type' and 'Description'.

In the 'Type' column, there is a section titled 'FileTrac® System Messages' with a sub-header 'Important Items about Your FileTrac® System'. Below this, there is a list of alerts. One alert, 'Adjuster Workload List', is highlighted with a red oval. A red arrow points from this alert to the 'Adjuster Workload List' section in the 'Description' column.

The 'Description' column shows the details of the 'Adjuster Workload List' alert. It includes a date '4/26/2018' and a subject line '***WEBINAR SCHEDULE for M A Y ***'. The description text mentions a webinar for admins and adjusters, with a registration deadline of Thursday, May 10th at 11:00 am EST. It also includes an important note about sending an email to WEBINARS@ONLINEREPORTINGINC.COM to request an invite.

Below the description, there is a table titled 'Adjuster Workload List' with the following data:

Adjuster	Open Claims	Average Days Open	Overdue Claims	MAX Workload
Adjuster, Test	<u>3</u>	356.0	0	0
Totals:	3	356.0	0	0

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



Manage Claims Screen

Alerts	Manage Claims	Reports	Quick Notes	Quick Timelog				
<h2>Manage Claims</h2> <div> [Plot claims/Get directions] </div> <div> <div>Adjuster Assigned</div> <div>Search</div> </div>								
1 of 1	Show 25	Rows						
File #	Claim #	Received	Insured (Claimant)	Client /Rep.	Status /Due	Time	Adjuster	Diary
1708834 @ UPLOAD >>> REPORTS	987654321 Doc. Library	7/3/2017	Johnson CONTACTS	Test Company 1 Desk Adjuster	Status Report Due: 10/3/2018		Test Adjuster	Notes
1704615 @ UPLOAD >>> REPORTS	123453 Doc. Library	4/26/2017	Syndicate Claim Services, Inc. CONTACTS	Test Company Test Rep	First Report Due: 1/31/2019		Test Adjuster	Notes
1609887 @ UPLOAD >>> REPORTS	467904 Doc. Library	12/1/2016	Cable CONTACTS	Test Company Test Rep	First Report Due: 10/3/2018		Test Adjuster	Notes
First Prev Page 1 of 1 Pages Next Last					Total 3 Files Found - Back to Top			

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.

View Claim		Manage this Claim Secondary Adjusters Export to Vedder Software Download Simsol File Download Simsol File (Multiple)
Client Company:	Test Company	
Client Name:	Test Rep	
Contract/Treaty:		
Year of Account		
File #:	1704615	
Secondary File #:		
Client Claim #:	123453	
Date Received:	4/26/2017	
Special Instructions:	Frankenmuth Notable Guidelines Header: Syndicate Upload: Via Xactanalysis Agreed Scope/Price: Reach agreed scope and price when possible. If unable to reach agreement address the discrepancy in the report. If a contractor estimate is provided, we will verify the damage and scope. If the damage, scope, and cost are reasonable, we will recommend settlement based on the contractor estimate up to \$20k. This applies for both daily and CAT guidelines. For losses expected to exceed \$100k, do not reach agreement until directed by the client. For losses expected to exceed \$250k, notify Frankenmuth management immediately via email to patrick.holdwick@fmins.com ; bryan.hoesman@fmins.com ; kevin.schorn@fmins.com Inspection Criteria: Address damage on a slope by slope/elevation by elevation basis. Do not write for unaffected areas based on deterioration or matching issues.	
Primary Insured's Information		
First Name:	Margaret	
Last Name:	Tilley	
Company:	Syndicate Claim Services, Inc.	
Email:		
Policy Type:	Commercial	
Policy #:	123456	
Policy Effective Date:	1/1/2017	
Policy Expiration Date:	1/1/2018	
Loan #:		
Phone #:	317-576-1315	
Alternate Phone #:		
Street Address:	PO Box 6151	
Address 2:		
City:	Fishers	
State:	IN	
ZIP:	46038	
Country:		
Mortgagee:		

****This information is entered by our Assignment Desk. Please verify this information with the Client Loss Notice, located in the [Reports](#) section.**

Manage Claims Screen

From the Manage Claims Screen, you can also Hover over the [blue underlined](#) to find more information

Alerts

Manage Claims

Reports

Quick Notes

Quick Timelog

Manage Claims

[Plot claims/Get directions]

1 of 1 Show 25 Rows ? Search All Primary Fields Search

File #	Claim #	Received	Insured (Claimant)	Client /Rep.	Status /Due	Time	Adjuster	Diary
1704615 @ UPLOAD>> REPORTS	123453 Doc Library	4/26/2017	Syndicate Claim Services, Inc. CONTACTS	Test Company Test Rep	First Report Due: 1/31/2019		Test Adjuster	Notes

Received	Insured (Claimant)
4/26/2017	Syndicate Claim Services, Inc. CONTACTS
Date of Loss: 4/25/2017 Loss Type: Wind Unit: Commercial Property Policy #: 123456	
EDIT	

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

Insured (Claimant)	Client /Rep.
Syndicate Claim Services, Inc. CONTACTS	Test Company Test Rep
Margaret Tilley Phone: 317-576-1315 Alternate Phone: Cell Phone: Email: PO Box 6151 Fishers, IN 46038 Loss Location 8383 Craig St Indianapolis, IN 46250	
Next Last	

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

Client /Rep.	Status /Due
Test Company Test Rep	First Report Due: 1/31/2019
Add Docs Claim Rep. Address Phone: Email: margaret.lirette@syndicateclaims.com Notes:	

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

Manage Claims [Plot claims/Get directions]										
1 of 1 Show 25 Rows Search All Primary Fields Search										
File #	Claim #	Received	Insured (Claimant)	Client /Rep.	Status /Due	Time	Adjuster	Diary		
1704615 @ UPLOAD>> REPORTS	123453 Doc Library	4/26/2017	Syndicate Claim Services, Inc. CONTACTS	Test Company Test Rep	First Report Due: 1/31/2019		Test Adjuster	Notes		
Date	Description		Size	Add Docs	Add Media	View All Files	Delete Report	Printed	Deliver	Viewed
4/16/2018	Initial Acknowledgement Letter (PDF) EDIT		52KB						✉ @	No
9/18/2017	Sketch.pdf (PDF) EDIT		OKB						✉ @	No
4/26/2017	Loss Notice (PDF) EDIT		OKB						✉ @	No

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**.

Alerts	Manage Claims	Reports	Quick Notes	Quick Timelog				
<h1>Manage Claims</h1> <div>Plot claims/Get directions</div> <div><div>1 of 1 Show 25 Rows</div><div><input type="text" value="Search All Primary Fields"/></div><div><input type="button" value="Search"/></div></div>								
File #	Claim #	Received	Insured (Claimant)	Client / Rep.	Status / Due	Time	Adjuster	Diary
1704615	123453 Doc Library	4/26/2017	Syndicate Claim Services, Inc. CONTACTS	Test Company Test Rep	First Report Due: 1/31/2019		Test Adjuster	Notes
<div><div>UPLOAD >></div><div>REPORTS </div></div>								

Date	Description	Size	Add Docs	Add Media	View All Files	Delete Report	Printed	Deliver	Viewed
6/11/2018	ESX setup (ESX) EDIT	24KB							No
6/8/2018	Loss Notice (PDF) EDIT	66KB							No
6/8/2018	Initial Acknowledgement Letter (PDF) EDIT	52KB							No
6/8/2018	Client Loss Info (PDF) EDIT	1105KB							No

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 Adjuster.

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.

The screenshot shows the 'Manage Claims' interface. At the top, there are tabs for Alerts, Manage Claims, Reports, Quick Notes, and Quick Timelog. Below the tabs is a table with columns: File #, Claim #, Received, Insured (Claimant), Client / Rep., Status / Due, Time, Adjuster, and Diary. The first row shows a claim with File # 1704615, Claim # 123453, Received 4/26/2017, Insured Syndicate Claim Services, Inc., Client / Rep. Test Company / Test Rep., Status / Due First Report / Due 1/31/2019, Time (clock icon), Adjuster Test Adjuster, and Diary Notes. Below the table is a list of documents: Initial Acknowledgement Letter (PDF), Sketch.pdf (PDF), and Loss Notice (PDF). A 'Close Popup' dialog box is open over the table, containing fields for Amount of Claim, RCV, ACV, Date of Inspection, and Date of First Contact. Red arrows point from the magnifying glass icon in the document list and the star icon in the instructions to the 'Date of Inspection' and 'Date of First Contact' fields respectively.

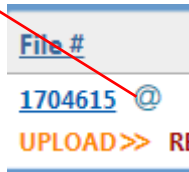
From the Manage Claims screen, **hover** over the magnifying glass icon



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

Sending Emails Through the File

Manage Claims [Plot claims/Get directions]								
1	of 1	Show	25	Rows	Search All Primary Fields			Search
File #	Claim #	Received	Insured (Claimant)	Client /Rep.	Status /Due	Time	Adjuster	Diary
1704615 UPLOAD>> REPORTS	123453 Doc Library	4/26/2017	Syndicate Claim Services, Inc. CONTACTS	Test Company Test Rep	First Report Due: 1/31/2019		Test Adjuster	Notes



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



Email Files: Claim #1704615 Comments for this Claim / Return to Managing this Claim

You can now drag/drop to sort the order of your attachments before emailing. Try it below!

File#: 1704615 Report Date: N/A Insured: Tilley, Margaret All Files for Claim #1704615

Email To: Select Manage my saved email recipients list

Email CC: Select

Email BCC: Select

Subject: Claim #123453; Insured: Syndicate Claim Services, Inc.; Claimant: Claim # Both

Body: Insert Signature

☒ HTML Format ☐ Plain Text ☐ Save This Email as a Report

You have selected 0MB (0KB) of files.
Maximum message size 40MB (40960KB)

Message Options: ☐ Mark High Priority ☐ Request Read Receipt

☐ Send the Email only, with NO Attachments.

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.

You have selected 0MB (0KB) of files.
Maximum message size 40MB (40960KB)

Message Options: ☐ Mark High Priority ☐ Request Read Receipt

☐ Send the Email only, with NO Attachments.

Select eMail Attachments - Reports

Select File	File <input checked="" type="checkbox"/> Use REPORT TITLE as the FILENAME OF THE ATTACHMENT for this email)	Date	Size
<input checked="" type="checkbox"/>	Initial Acknowledgement Letter	4/16/2018	52KB
<input type="checkbox"/>	Sketch.pdf	9/18/2017	0KB
<input type="checkbox"/>	Loss Notice	4/26/2017	0KB

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

Alerts	Manage Claims	Reports	Quick Notes	Quick Timelog				
<div>Manage Claims [Plot claims/Get directions]</div> <div><div>1 of 1 Show 25 Rows ?</div><div>Search All Primary Fields <input type="text"/></div><div>Search</div></div>								
File #	Claim #	Received	Insured (Claimant)	Client /Rep.	Status /Due	Time	Adjuster	Diary
1704615 @ UPLOAD >> REPORTS <<	123453 Doc Library	4/26/2017	Syndicate Claim Services Inc. CONTACTS	Test Company Test Rep	First Report Due: 1/31/2019		Test Adjuster	Notes

AlertsNew ClaimManage ClaimsBillingQuick NotesQuick TimelogReportsCompanies | Users | Settings

Upload Reports

Upload Media Files | Manage This Claim

File #: 1806164

Client Claim #: H11098

Insured: Jerome, Jeffrey D

Company: Cameron Mutual Insurance Rep: Vanderslice, Nick

+ Add Files (0/50)

Max files per upload: 50

Compress photos (recommended)

Drag + Drop Files Here

Hint

Upload Notifications

Note: these options apply to each pending upload (unless explicitly excluded).

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

+ Add Files (1/50)

Drag + Drop Files Here Hint

File	Date	Type	Description
Appraisal Protocol 2-20-18 MB.pdf Convert to PDF Exclude From Notifications File Size: 242.32 KB	6/12/2018	Miscellaneous Appraisal Protocol 2-20-18 MB.pc	Add description... Confidential

Upload Notifications

Note: these options apply to each pending upload (unless explicitly excluded).

Notify Assigned Adjuster (Carser, Jerry) via...
Email about new files ...and attach files to email
Text message about new files

Notify Assigned Supervisor (Voigt, Brenda) via...
Email about new files ...and attach files to email
Text message about new file(s)

Notify Assigned...

Upload 1 Pending File

Total File Size 0.2 MB / 242 KB

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.


Manage Claims [Plot claims/Get directions]

1 of 1 Show 25 Rows Search All Primary Fields Search

File #	Claim #	Received	Insured (Claimant)	Client /Rep.	Status /Due	Time	Adjuster	Diary
1704615 ⓘ	123453 <small>Doc Library</small>	4/26/2017	Syndicate Claim Services Inc. <small>CONTACTS ⓘ</small>	Test Company <small>Test Rep</small>	First Report <small>Due: 1/31/2019</small>		Test <small>Adjuster</small>	Notes
UPLOAD>> REPORTS ⓘ								

Date	Description				Size	Add Docs	Add Media	View All Files	Delete Report	Printed	Deliver	Viewed
4/16/2018	Initial Acknowledgement Letter (PDF) EDIT				52KB						@	No
9/18/2017	Sketch.pdf (PDF) EDIT				OKB						@	No
4/26/2017	Loss Notice (PDF) EDIT				OKB						@	No

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.

Edit Report Title		Manage this Claim View this Report
Customer Name:	Test Company - Test Rep	
Insured's Name:	Triley	
Customer File #:	123453	
Your File #:	1704615	
Report Date:	9/18/2017 	
Report Type:	Miscellaneous Sketch.pdf	
Report Description:	<div></div> <div>Characters left: 400</div>	
	<div>Save</div>	

Simply change the name under the Report Type and click Save

Diary Notes Screen

Alerts

Manage Claims

Reports

Quick Notes

Quick TimeLog

Manage Claims [Plot claims/Get directions]

1 of 1 Show 25 Rows Search All Primary Fields

Search

File #	Claim #	Received	Insured (Claimant)	Client /Rep.	Status /Due	Time	Adjuster	Diary
1704615 ⓘ	123453	4/26/2017	Syndicate Claim Services Inc.	Test Company	First Report	Due: 1/31/2019	Test Adjuster	Notes
UPLOAD>> REPORTS ⓘ								

<

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.

Diary Notes for File #1704615

Enter your diary note here:

Enter Note here.

TXT Safe: Yes

Text Characters Max 100: 100

Insert Signature

NEW! My Clippings

Remind me about this on 6/7/2018

Time: 08:00:00 AM

Save Comment

Ready for Review

NOTE VISIBILITY OPTIONS ?

Visible to Client To email/alert/etc. your Client, check this box.

COMMUNICATION METHODS

Show Alert in FileTrac

Send Email/Text Message Plain Email

CHOOSE RECIPIENTS (for methods selected above)

Client Company Claims Rep for this file

Admin Invoicing Office

Alisha Burman

Allegra Nottage

Amarany Sanchez

Amber Hartness

Amy Duplaga

Andy Mashino

Angela Rail

Annie Harriman

The following are email only recipients: To use them you must activate email notification at the top of this page. This will apply to all selected recipients for this note.

Email the Primary Insured

Email the Primary Claimant

Email this address

Save Comment



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**



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

Manage Claims [Plot claims/Get directions]								
1 of 1	Show	25	Rows	?	Search All Primary Fields		Search	
File #	Claim #	Received	Insured (Claimant)	Client /Rep.	Status /Due	Time	Adjuster	Diary
1704615 @ UPLOAD>> REPORTS	123453 Doc Library	4/26/2017	Syndicate Claim Services, Inc. CONTACTS	Test Company Test Rep	First Report Due: 1/31/2019		Test Adjuster	Notes

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

Alerts

Manage Claims

Reports

Quick Notes

Quick Timelog

Timelog for File #1704615

Manage this Claim | View Complete Timelog

Existing Entries

There is now an option to enter the Code as an auto-filling text box instead of the original drop-down. Start typing the Code and select from the options that appear. The traditional drop-down is still available, and either input may be used for entry of the Code.

Insured: Syndicate Claim Services, Inc.

Date: 6/12/2018

Billing Comments: Comments entered here are visible to Admin staff at the time of invoice creation. Characters left: 500

Pre-Fill from Macro Template

Select a Macro Template

Service Name

Code

Description

Quantity

Hours

0

Add Service Row

Expenses

Reimburse

Description

Amount

Select Expense

This Expense WILL ONLY be reimbursed if this box is checked

1000

\$ 0

Add Expense Row

Submit Timelog Entry

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.

The screenshot shows the FileTrac home interface. At the top right, the user is logged in as 'Test Adjuster'. A red circle highlights the 'View Payouts' link next to the user name. Below the navigation bar, the 'Alerts' section is active, displaying system messages and reminders. The 'FileTrac® System Messages' section contains a webinar schedule for June. The 'FileTrac™ Reminders' section shows a general reminder for 6/7/2018. The bottom navigation bar includes links for Alerts, Manage Claims, Reports, Quick Notes, and Quick Timelog.

The screenshot shows the 'Saved Payouts' page. The page header includes the Syndicate logo and FileTrac navigation links. The 'Saved Payouts' section has a search bar and a table with columns: Adjuster, Pay Period, Payout Date, Check #, Amount, and Comments. A red arrow points to the 'Comments' column header. Below the table, a message states 'No Saved Payouts Found'. The bottom navigation bar is the same as the previous screenshot.

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

File #	Claim #	Received	Insured (Claimant)	Client / Rep.	Status / Due	Time	Adjuster	Diary
1704615	123453	4/26/2017	Syndicate Claim Services, Inc.	Test Company Test Rep	First Report Due: 1/31/2019		Test Adjuster	Notes

Date	Description	Size	Printed	Deliver	Viewed
4/16/2018	Initial Acknowledgement Letter (PDF) EDIT	52KB			No
9/18/2017	Sketch.pdf (PDF) EDIT	0KB			No
4/26/2017	Loss Notice (PDF) EDIT	0KB			No

Secure | <https://cms.filetrac.net/system/comments.asp?claimID=2942938>

Click here to populate fields with saved data! [Discard saved data](#) [Save Progress](#)

Diary Notes for File #1704615

Enter your diary note here:

☐ **Ready for Review**

NOTE VISIBILITY OPTIONS

☐ **Visible to Client** To email/alert/etc. your Client, check this box.

COMMUNICATION METHODS

☐ **Show Alert in FileTrac**
☐ **Send Email/Text Message** ☐ **Plain Email**

CHOOSE RECIPIENTS (for methods selected above)

- ☐ Client Company Claims Rep for this file
- ☐ Admin Invoicing Office
- ☐ Alisha Burman
- ☐ Allegra Nottage
- ☐ Amairany Sanchez
- ☐ Amber Hartness
- ☐ Amy Duplaga
- ☐ Andy Mashino
- ☐ Angela Rail
- ☐ Annie Harriman

The following are **email only** recipients. To use them you must activate email notification at the top of this page. This will apply to all selected recipients for this note.

☐ **Email the Primary Insured**
☐ **Email the Primary Claimant**
☐ **Email this address:**

☐ **Remind me about this on** **6/13/2018** **Time:** 08:00:00 AM

[Save Comment](#)

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.

Diary Notes for File #1704615

Enter your diary note here:

Please review the closing docs.
Syndicate Manager Name:
Insurance Company Name is:
Is the ESX File uploaded
The RCV is \$
The ACV is \$
Total mileage is:
Brotherhood is billed from our closest adjuster location (see Google Earth):
All other clients are billed from nearest billing point or the adjuster's residence:
Adjuster Name _____
Eagleview Report Receipt:
Text Safe: Yes
Text Characters Max 100: 100
Insert Signature
NEW My Clippings
Remind me about this on 6/11/2018
Time: 08:00:00 AM
Save Comment

Ready for Review

NOTE VISIBILITY OPTIONS ?
Visible to Client To email/alert/etc. your Client, check this box.

COMMUNICATION METHODS
Show Alert in FileTrac
Send Email/Text Message Plain Email

CHOOSE RECIPIENTS (for methods selected above)
Client Company Claims Rep for this file
Admin Invoicing Office
Alisha Burman
Allegra Nottage
Amairany Sanchez
Amber Hartness
Amy Duplaga
Andy Mashino
Angela Rail
Annie Harriman
The following are email only recipients. To use them you must activate email notification at the top of this page. This is
Email the Primary Insured
Email the Primary Claimant
Email this address: _____

Save Comment

KEY: =Adjuster Comments Alert Shown

All	Status	User	Comment
<input type="checkbox"/>		Bulthuis, Mistie ADMIN	3/9/2018 2:02:05 PM Called Insured, Mary, at 812-153-5183. We set up inspection for Monday 3/12/2018. He

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



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.

Manage Claims | Plot claims/Get directions |

1 of 1 Show 25 Rows Search All Primary Fields Search

File #	Claim #	Received	Insured (Claimant)	Client /Rep.	Status /Due	Time	Adjuster	Diary
1704615 ⓘ	123453	4/26/2017	Syndicate Claim Services Inc.	Test Company	First Report		Test	
UPLOAD>> REPORTS ⓘ	Doc. Library		CONTACTS ⓘ	Test Rep	Due: 1/31/2019	⌚	Adjuster	Notes

Claim #
123453
Doc. Library

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

Document Library

Manage this Claim

The document library houses both General Documents and Client-Specific Documents for file# 1704615.

Select Category:

ALL

Client Instructions Document

Appraisal Documents

Blank Forms

Client Specific Forms

Policies

Recorded Statements

Time & Expense

Training

Claim Manager Territory List

Token Reports

North Star After Hours Program

Click to view documents

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

Document Library Manage this Claim

The document library houses both General Documents and Client-Specific Documents for **file# 1704615**.

Select Category: ****ALL**** Click to view documents

- **ALL**
- Client Instructions Document
- Appraisal Documents
- Blank Forms
- Client Specific Forms**
- Policies
- Recorded Statements
- Time & Expense
- Training
- Claim Manager Territory List
- Taken Reports
- North Star After Hours Program

Document Library Manage this Claim

The document library houses both General Documents and Client-Specific Documents for **file# 1704615**.

Select Category: **Client Specific Forms** Click to view documents

Copy to file ?	Description
	Captioned Report Sample
	Fee Schedule
	Guidelines
	TEST Document

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.

Manage Claims [Plot claims/Get directions]									
1704615	123453	4/26/2017	Syndicate Claim Services Inc.	Test Company	First Report	Due: 1/31/2019		Test Adjuster	Notes

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

Document Library		Manage this Claim
The document library houses both General Documents and Client-Specific Documents for file# 1704615.		
Select Category:	Blank Forms	Click to view documents
Copy to file ?	Description	
	Agreed Value Coinsurance xls sheet	
	Business Interruption Worksheet	
	Coins Form CP MP & CF Excel sheet	
	Contents - Excel Sheet	
	Contents Sheet	
	Contents Sheet - Excel - Actual Value will Auto Calculate	
	Creating a Residential ITV	
	Diagram Sheet	
	Dumpster Capacity Rating	
	Fax Cover Sheet	
	Frozen Pipe Checklist	
	General release form	
	General release form PDF	
	General release form with notary	
	General release form with notary PDF	
	IL Claims - Additional Statement	
	Lightning Affidavit	
	Med Authorization Form	
	Medical Records Request	
	Mercantile Stock Inventory Wksht	
	Non-Waiver	
	Recorded Statement Analysis	

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.