



# Syndicate

EVERY CLAIM, EVERY TIME

## NAVIGATING FILETRAC

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

Manage Claims *Design by ZIP | UNASSIGNED | by: Mia*

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

File #	Claim #	Received	Insured (Claimant)	Client /Rep.	Status /Due	Time	Adjuster	Diary	Invoice
1710721 @ \$	12345	7/28/2017	Insure	Test Company	First Report Due: 4/30/2018		Doneg	Notes	Create

UPLOAD >> REPORTS

First | Prev | Page 1 of 1 Pages | Next | Last

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

Secure Login

credentials you entered are incorrect. Please try again.

Alerts Manage Claims Reports Quick Notes

Manage Claims *(edit 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
123456	987654321	7/23/2017	Insure	Test Company	Status Report Due: 10/3/2018		Test Adjuster	Notes

Date	Description	Bundle Docs	Size	Add Docs	Add Media	View All Files	Delete Report	Printed	Deliver	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	NDFJ BC Settlement for File # 123456789	EDIT	0KB							No
9/18/2017	Sample Photo Report.pdf (PDF)	EDIT	0KB							No
9/18/2017	Sample Inkm 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	ISX 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

## CONTENTS

Getting Familiar with FileTrac.....	4
Alerts.....	7
Manage Claims Screen.....	10
Submitting Your File for Review.....	19
Document Library – A Closer Look at Your Resources .....	24
Let’s Walk Through a Claim in FileTrac – <i>A FileTrac Client</i> .....	28



## FREQUENTLY ASKED QUESTIONS

How do I enter my date of contact? .....	14
How do I enter my inspection date? .....	14
How do I find the Desk Adjuster's contact information? .....	12
How do I enter a note to the file? .....	18
How do I send an email through FileTrac? .....	15
How do I email a document from FileTrac to someone? .....	15
How do I submit my file for review? .....	22
How do I label my document in FileTrac? .....	17

\*\*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 with a lock icon and the text "Secure Login". Below the header are two white input fields: "Login ID" and "Password". An orange "Login" button with a right-pointing arrow is positioned below the fields. At the bottom right of the form area, there are two blue links: "Forgot Password?" and "Need Help?".

[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

Type	Description
FileTrac® System Messages <i>Important Items about Your FileTrac® System</i>	<ul style="list-style-type: none"> <li>5/15/2018 -           <ul style="list-style-type: none"> <li>* 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. <a href="#">Clear</a></li> </ul> </li> </ul>
FileTrac® Support Tickets	<ul style="list-style-type: none"> <li>CONFIRM COMPLETED: Support Ticket: #730024</li> <li>CONFIRM COMPLETED: Support Ticket: #731272</li> <li>CONFIRM COMPLETED: Support Ticket: #731352</li> <li>CONFIRM COMPLETED: Support Ticket: #731439</li> <li>CONFIRM COMPLETED: Support Ticket: #731478</li> </ul>
Select Alert <ul style="list-style-type: none"> <li><a href="#">FileTrac® Reminders</a></li> <li><a href="#">Response Requested from Others (descending) - Comments Marked Urgent</a> <small>Red indicates Unread. Green indicates Read.</small></li> <li><a href="#">Response Requested by Me - Comments Marked Urgent</a> <small>Red indicates Unread. Green indicates Read.</small></li> <li><a href="#">Adjuster Workload List</a></li> <li><a href="#">Reviewer Workload List (for Management)</a></li> <li><a href="#">Pending Assignments - View Pending Assignment List</a></li> <li><a href="#">Manager Workload List</a></li> <li><a href="#">Supervisor Workload List</a></li> <li><a href="#">Claims Ready for Review - Status of "Ready For Review" for Supervisors</a></li> <li><a href="#">Claims Returned for Corrections - Status of "Return For Corrections" for Supervisors</a></li> <li><a href="#">My Open Reviews</a></li> <li><a href="#">My Open Reviews &gt; 24 Hours</a></li> <li><a href="#">Open Claims Assigned to me as Reviewer</a></li> </ul>	FileTrac™ Reminders <p style="text-align: right;"><a href="#">Add General Reminder</a>   <a href="#">View FUTURE Reminders</a></p> <p><b>Select ALL</b> <span style="float: right;"><b>Clear Selected Reminder(s)</b></span></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 5/15/2018 - General Reminder Multiple changes have been made to GuideOne Guidelines. Please review! <a href="#">Clear</a>   <a href="#">Edit</a></li> </ul>

**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.

The screenshot displays the FileTrac Alerts interface. At the top, there is a navigation bar with tabs for Alerts, Manage Claims, Reports, Quick Notes, and Quick Timelog. The Alerts tab is highlighted and circled in red. Below the navigation bar, there 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. The Type column lists various alert categories, and the Description column provides details for each alert. A 'Select Alert' section is also visible, containing a list of alert categories and a 'Clear Selected Reminder(s)' button.

**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 the following content:

**Alerts** (Search: Adjuster Assigned)

Type	Description															
<b>FileTrac® System Messages</b> <i>Important Items about Your FileTrac® System</i>	<ul style="list-style-type: none"> <li>4/26/2018 -  <b>***WEBINAR SCHEDULE for M A Y ***</b>  Webinar for ADMINIS ONLY is TUESDAY, MAY 8th at 11:00 am EST.  Webinar for Adjusters is THURSDAY, MAY 10th at 11:00 am EST.  <b>IMPORTANT! To sign up please send an email with the DATE of the webinar you wish to attend in the SUBJECT LINE to: WEBINARS@ONLINEREPORTINGINC.COM *** We will only REPLY and send the (one) invite to the email address requesting the reservation only. Please limit one request per email address. PLEASE NOTE: YOU ONLY NEED ONE INVITE PER COMPUTER NOT PER PERSON. THANK YOU!</b>  <a href="#">(Clear)</a> </li> </ul>															
<b>Select Alert</b> <ul style="list-style-type: none"> <li><a href="#">FileTrac® Reminders</a></li> <li><a href="#">Response Requested from Others - Comments Marked Urgent</a>  Red indicates Unread. Green indicates Read.</li> <li><a href="#">Response Requested by Me - Comments Marked Urgent</a>  Red indicates Unread. Green indicates Read.</li> <li><a href="#">Claims Overdue</a></li> <li><a href="#">Status Due Today</a></li> <li><a href="#">Adjuster Workload List</a></li> <li><a href="#">My Claims With Revision Required</a></li> <li><a href="#">Upcoming Claims Due - Due within 7 Days</a></li> </ul>	<p><b>Adjuster Workload List</b></p> <table border="1"> <thead> <tr> <th>Adjuster</th> <th>Open Claims</th> <th>Average Days Open</th> <th>Overdue Claims</th> <th>MAX Workload</th> </tr> </thead> <tbody> <tr> <td>Adjuster, Test</td> <td><u>3</u></td> <td>356.0</td> <td>0</td> <td>0</td> </tr> <tr> <td>Totals:</td> <td>3</td> <td>356.0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	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
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				
<b>Manage Claims</b> [ Plot claims/Get directions ] <span style="float: right;">1 of 1 Show 25 Rows ?</span>								
<div style="text-align: right;">             Adjuster Assigned <input type="text"/> <input type="button" value="Search"/> </div>								
File #	Claim #	Received	Insured (Claimant)	Client /Rep.	Status /Due	Time	Adjuster	Diary
<a href="#">1708834</a> @ UPLOAD >> REPORTS	<a href="#">987654321</a> <small>Doc Library</small>	7/3/2017	<a href="#">Johnson</a> <small>CONTACTS</small>	<a href="#">Test Company</a> <a href="#">1 Desk Adjuster</a>	Status Report Due: 10/3/2018		<a href="#">Test Adjuster</a>	<a href="#">Notes</a>
<a href="#">1704615</a> @ UPLOAD >> REPORTS	<a href="#">123453</a> <small>Doc Library</small>	4/26/2017	<a href="#">Syndicate Claim Services, Inc.</a> <small>CONTACTS</small>	<a href="#">Test Company</a> <a href="#">Test Rep</a>	First Report Due: 1/31/2019		<a href="#">Test Adjuster</a>	<a href="#">Notes</a>
<a href="#">1609887</a> @ UPLOAD >> REPORTS	<a href="#">467904</a> <small>Doc Library</small>	12/1/2016	<a href="#">Cable</a> <small>CONTACTS</small>	<a href="#">Test Company</a> <a href="#">Test Rep</a>	First Report Due: 10/3/2018		<a href="#">Test Adjuster</a>	<a href="#">Notes</a>
First   Prev   Page 1 of 1 Pages   Next   Last					Total 3 Files Found - <a href="#">Back to Top</a>			

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		<a href="#">Manage this Claim</a>   <a href="#">Secondary Adjusters</a> <a href="#">Export to Vedder Software</a>   <a href="#">Download Simsol File</a>   <a href="#">Download Simsol File (Multiple)</a>
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.	
<b>Primary Insured's Information</b>		
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				
<b>Manage Claims</b> [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 <i>Doc. Library</i>	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
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.

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				
<b>Manage Claims</b> [ Plot claims/Get directions ] <span style="float: right;">1 of 1 Show 25 Rows ? Search All Primary Fields <input type="text"/> <input type="button" value="Search"/></span>								
File #	Claim #	Received	Insured (Claimant)	Client / Rep.	Status / Due	Time	Adjuster	Diary
1704615	122453 <small>Doc. Library</small>	4/26/2017	Syndicate Claim Services, Inc. <small>CONTACTS </small>	Test Company Test Rep	First Report Due: 1/31/2019		Test Adjuster	<a href="#">Notes</a>



Date	Description				Size	Add Docs	Add Media	View All Files	Delete Report	Printed	Deliver	Viewed
6/11/2018	<a href="#">ESX setup (ESX)</a> <a href="#">EDIT</a>				24KB						@	No
6/8/2018	<a href="#">Loss Notice (PDF)</a> <a href="#">EDIT</a>				66KB						@	No
6/8/2018	<a href="#">Initial Acknowledgement Letter (PDF)</a> <a href="#">EDIT</a>				52KB						@	No
6/8/2018	<a href="#">Client Loss Info (PDF)</a> <a href="#">EDIT</a>				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. A table lists claims with columns for File #, Claim #, Received, Insured (Claimant), Client / Rep., Status / Due, Time, Adjuster, and Diary. A 'Close Popup' form is overlaid on the table, containing fields for Amount of Claim, RCY, ACY, Date of Inspection, and Date of First Contact. Each date field has a calendar icon. The form also includes an 'Update' button and a note: '\* Date will be recorded into Diary Notes. Visible to Client.'

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

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 Text 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 eMail

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 eMail

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"/>	<a href="#">Initial Acknowledgement Letter</a>	4/16/2018	52KB
<input type="checkbox"/>	Sketch.pdf	9/18/2017	0KB
<input type="checkbox"/>	Loss Notice	4/26/2017	0KB

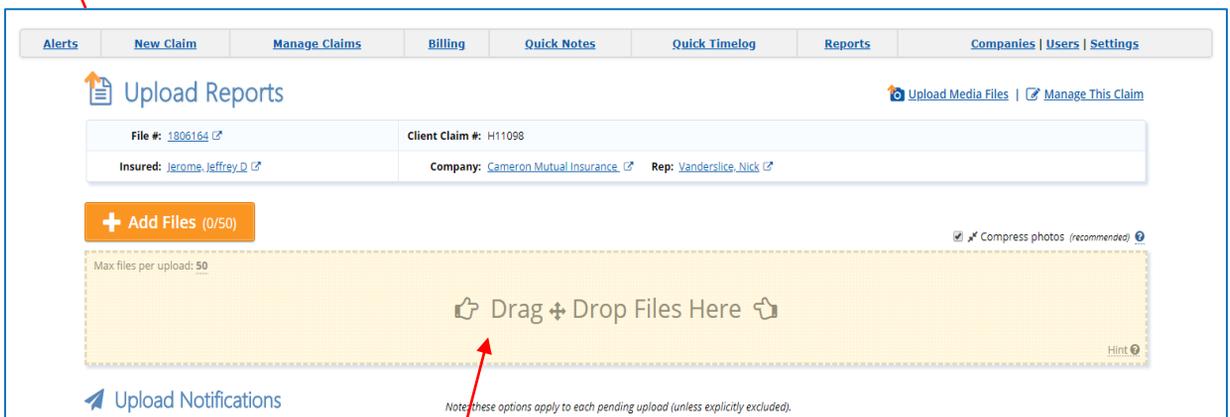
If you **do** want to add any attachments, that are uploaded to the file, to the email select the documents and then hit Send Email.

# 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



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



**Upload Reports**

File #: 1806164 | Client Claim #: H11098  
Insured: Jerome, Jeffrey, D | Company: Cameron Mutual Insurance | Rep: Vanderslice, Nick

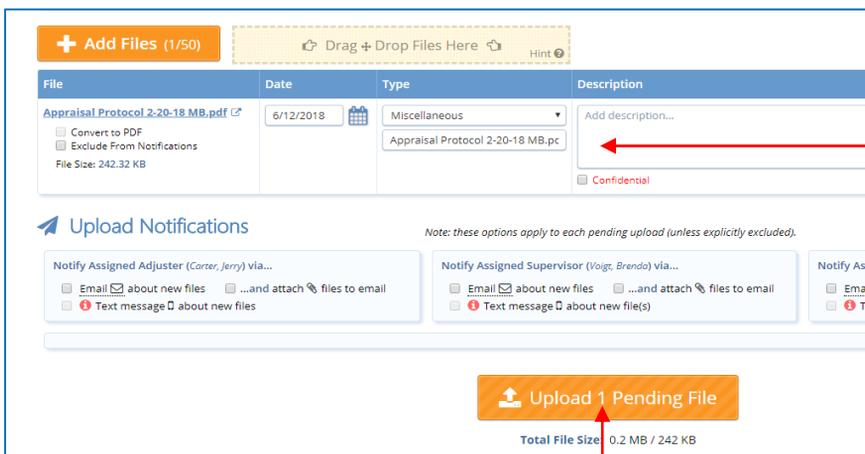
**+ Add Files (0/50)**  Compress photos (recommended)

Max files per upload: 50

**Drag + Drop Files Here**

**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**

File	Date	Type	Description
Appraisal Protocol 2-20-18.MB.pdf <input type="checkbox"/> Convert to PDF <input type="checkbox"/> Exclude From Notifications File Size: 242.32 KB	6/12/2018	Miscellaneous Appraisal Protocol 2-20-18.MB.pc	Add description... <input type="checkbox"/> 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)

**Upload 1 Pending File**

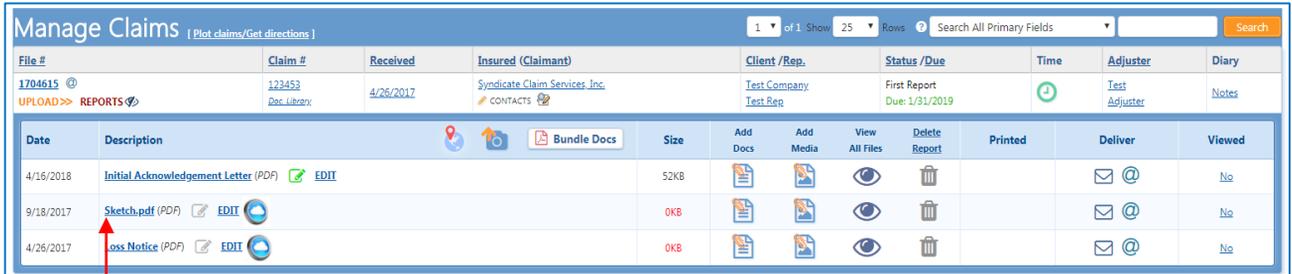
Total File Size: 0.2 MB / 242 KB

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

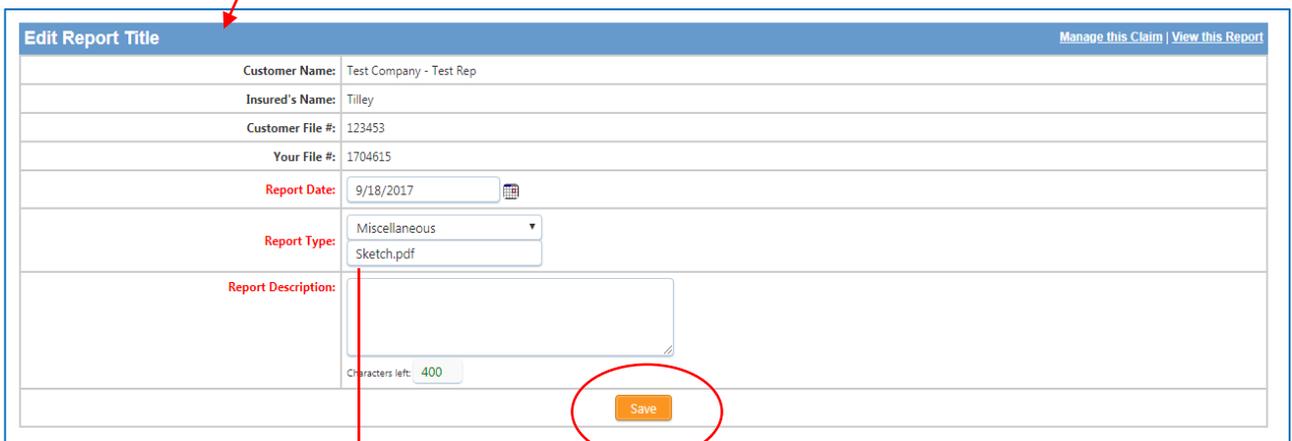
# Changing Document Titles in FileTrac

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



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	
<b>UPLOAD &gt;&gt; REPORTS</b>									
<a href="#">Doc Library</a> <a href="#">CONTACTS</a>									
Date	Description	Size	Add Docs	Add Media	View All Files	Delete Report	Printed	Deliver	Viewed
4/16/2018	Initial Acknowledgement Letter (PDF) <a href="#">EDIT</a>	52KB						@	No
9/18/2017	Sketch.pdf (PDF) <a href="#">EDIT</a>	0KB						@	No
4/26/2017	Loss Notice (PDF) <a href="#">EDIT</a>	0KB						@	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: Trilley

Customer File #: 123453

Your File #: 1704615

Report Date: 9/18/2017

Report Type: Miscellaneous  
Sketch.pdf

Report Description:

Characters left: 400

**Save**

Simply change the name under the Report Type and click Save

# Diary Notes Screen

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	Add Docs	Add Media	View All Files	Delete Report	Printed	Deliver	Viewed
4/16/2018	Initial Acknowledgement Letter (PDF) <a href="#">EDIT</a>	52KB							No
9/18/2017	Sketch.pdf (PDF) <a href="#">EDIT</a>	0KB							No
4/26/2017	Loss Notice (PDF) <a href="#">EDIT</a>	0KB							No

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
- 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:

[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

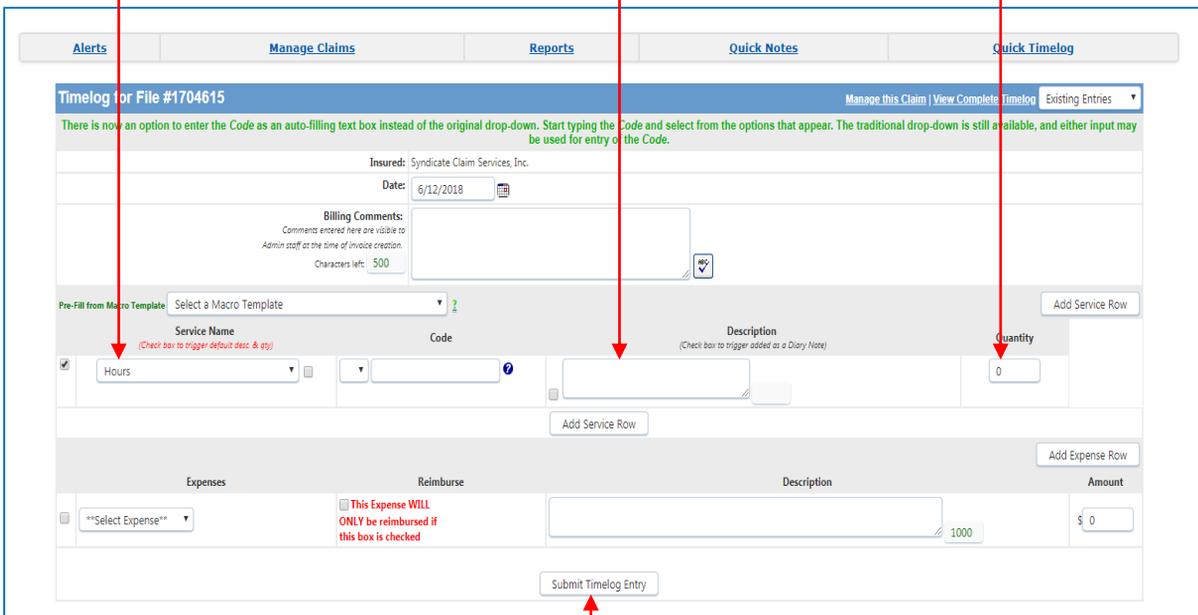


File #	Claim #	Received	Insured (Claimant)	Client /Rep.	Status /Due	Time	Adjuster	Diary
1704615	123453	4/26/2017	Syndicate Claim Services, Inc.	Test Company Test Rep	First Report Due: 1/31/2019		Test Adjuster	Notes

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 Add Service Row

Service Name	Code	Description	Quantity
<input checked="" type="checkbox"/> Hours			0

Add Service Row

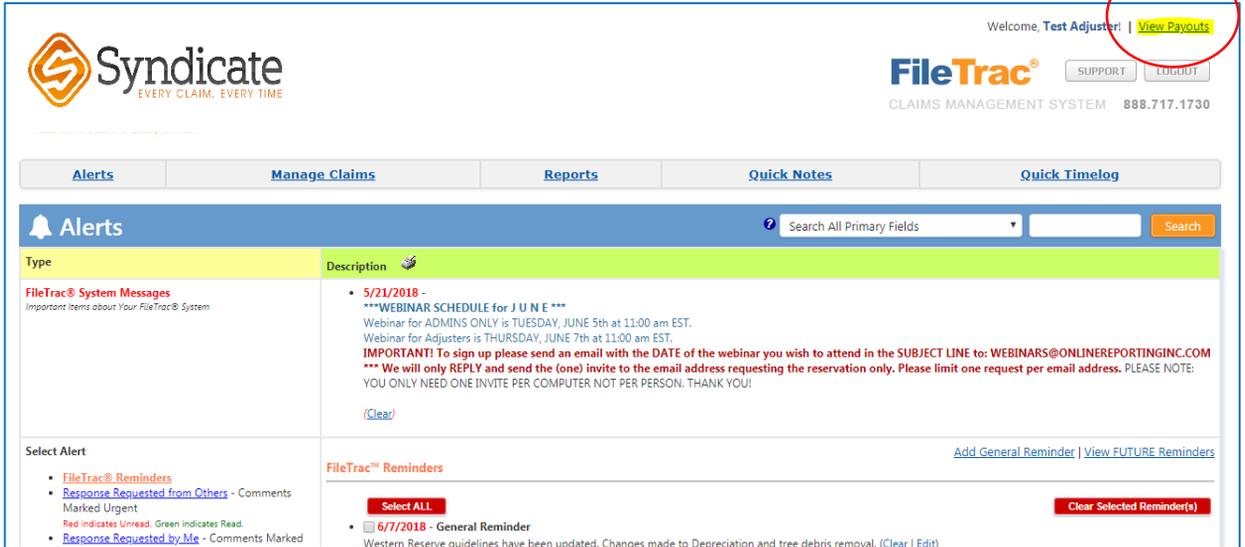
Expenses	Reimburse	Description	Amount
<input type="checkbox"/> **Select Expense**	<input type="checkbox"/> This Expense WILL ONLY be reimbursed if this box is checked		1000 \$ 0

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' and the 'View Payouts' link is highlighted with a red circle. The main navigation bar includes 'Alerts', 'Manage Claims', 'Reports', 'Quick Notes', and 'Quick Timelog'. The 'Alerts' section is active, displaying a search bar and a list of alerts. One alert is titled 'FileTrac® System Messages' with a description about a webinar schedule for June 5th and 7th. Below this, there are sections for 'Select Alert' and 'FileTrac™ Reminders'.



The screenshot shows the 'Saved Payouts' page. At the top, there is a search bar and a 'Search' button. Below the search bar, there are navigation links: 'First | Prev | Page 1 of 0 Pages | Next | Last'. A table with the following columns is displayed: 'Adjuster', 'Pay Period', 'Payout Date', 'Check #', 'Amount', 'Comments', and a trash icon. The table is currently empty, with the text 'No Saved Payouts Found' centered below it. A red arrow points to the 'Comments' column header.

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

Diary Notes for File #1704615

Enter your diary note here:

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

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

Save Comment

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  
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 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: \_\_\_\_\_

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

Ready for Review

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.

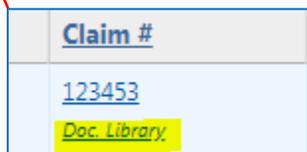
# Document Library



# 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.

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



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

### Document Library

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

Below are commonly used categories:

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

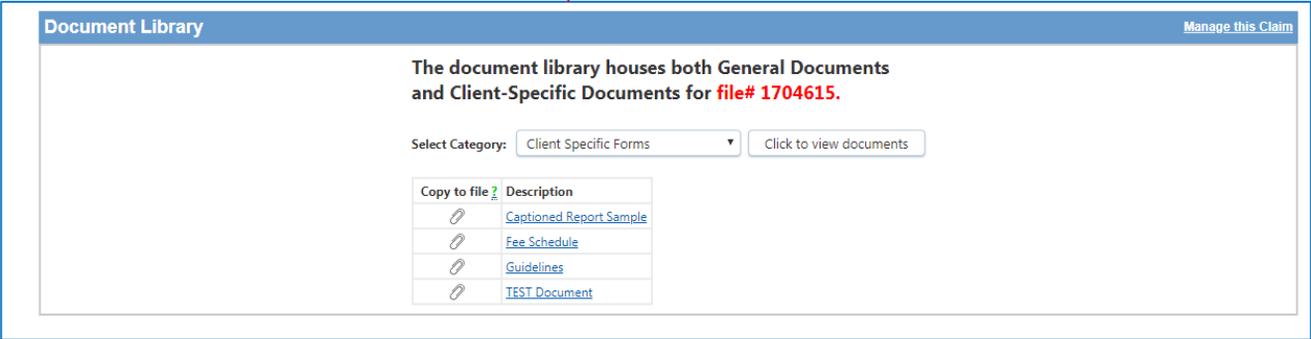
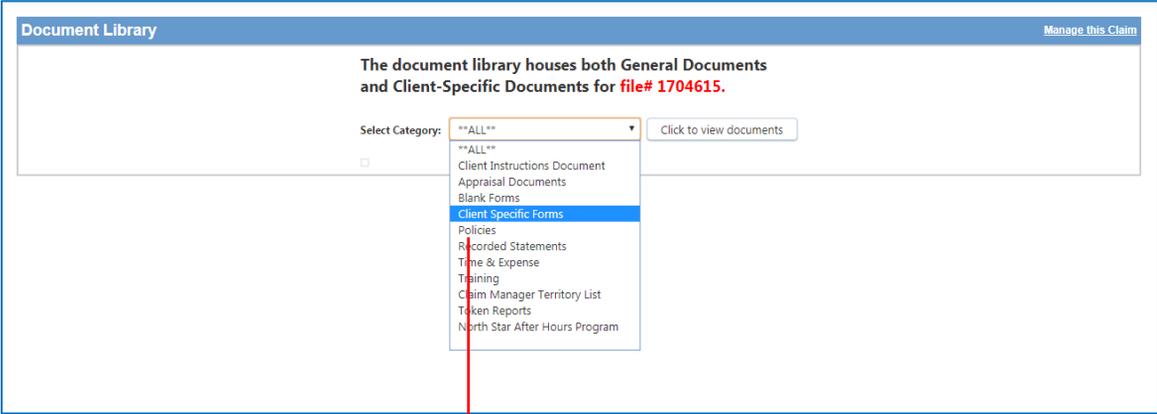
**Training:** This is where you will find training material. Including this reference guide.

**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.

File #	Claim #	Received	Insured (Claimant)	Client /Rep.	Status /Due	Time	Adjuster	Diary
1704615  	123453 <a href="#">Doc Library</a>	4/26/2017	Syndicate Claim Services Inc. 	Test Company Test Rep	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:

Copy to file ?	Description
	<a href="#">Agreed Value Coinsurance xls sheet</a>
	<a href="#">Business Interruption Worksheet</a>
	<a href="#">Coins Form CP MP &amp; CF Excel sheet</a>
	<a href="#">Contents - Excel Sheet</a>
	<a href="#">Contents Sheet</a>
	<a href="#">Contents Sheet - Excel - Actual Value will Auto Calculate</a>
	<a href="#">Creating a Residential ITV</a>
	<a href="#">Diagram Sheet</a>
	<a href="#">Dumpster Capacity Rating</a>
	<a href="#">Fax Cover Sheet</a>
	<a href="#">Frozen Pipe Checklist</a>
	<a href="#">General release form</a>
	<a href="#">General release form PDF</a>
	<a href="#">General release form with notary</a>
	<a href="#">General release form with notary PDF</a>
	<a href="#">IL Claims - Additional Statement</a>
	<a href="#">Lightning Affidavit</a>
	<a href="#">Med Authorization Form</a>
	<a href="#">Medical Records Request</a>
	<a href="#">Mercantile Stock Inventory Wksht</a>
	<a href="#">Non-Waiver</a>
	<a href="#">Recorded Statement Analysis</a>

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.