

COURSE OUTLINE – (FP06) CASE MANAGER

Overview

FINEOS Case Manager has been designed to enable users to effectively manage and control all interactions with a party in relation to a case. It is a highly configurable component that gives users a single view of the caseload of each customer, allowing them to inquire on all aspects of case data, irrespective of how many people or processes are involved. Users can browse through all cases and drilldown to a particular case to view its owner, status, related contacts, tasks, documents (incoming and outgoing) and accounts and payments information as well as manage all aspects of the payment of a claim.

Objectives

To provide attendees with an understanding of all functionality contained within the Case Manager application, and how this functionality interacts with, and can be applied in the context of an overall FINEOS Solution implementation.

Who should attend?

All Project Resources involved in the Business Configuration of a FINEOS Solution and all End Users who will be using the FINEOS Case Manager component.

Topics

Introduction & Overview

- Accessing Case Manager
- Terminology and Definitions

General Case Manager details

- General Case details
- Case History details
- Tasks
- Contacts
- Documents
- Case Type Specific Tabs
- Notes
- Appointments
- Case Aliases
- Transferring Cases

Searching for Cases

Available Actions and Action History

Pre-requisites

Attendance at the FINEOS Process Manager and Customer Manager modules would be preferable but not mandatory.

Formats & Duration

Training Format	Description	Maximum number of attendees	Duration
Classroom	An instructor-led session combining a blended learning approach of theory, hands-on exercises and knowledge checks	8	One Half Day

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