

COURSE OUTLINE – (FP07) CLAIMS MANAGER

Overview

FINEOS Claims Manager automates business processes including claim intake, eligibility checks, verification, assessment, approval, and denial. 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 claim data, irrespective of how many people or processes are involved. Claims Manager has been designed to enable users to effectively manage and control all interactions with a party in relation to a claim. Users can browse through all claims and drill down to a particular claim to view its owner, associated benefits, status, related contacts, tasks, documents (incoming and outgoing) and accounts and payments information as well as manage all aspects of the benefits for payment of a claim.

Objectives

To provide attendees with an understanding of all functionality contained within the Claims 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 Claims Manager component

Topics

Introduction & Overview

- Accessing Claims Manager
- Claim Management Hierarchy
- Terminology and Definitions

General Claim details

- Searching for claims
- Claim/Benefit structure
- Updating/Viewing Claim details
- Linking Party Case Roles
- Claim History details
- Tasks (at Claim level)
- Contacts details
- Documents details
- Case Actions

- Claim Notes
- Medical details
- Social Security details
- Appointments
- Case Aliases
- Coverages
- Benefit Rights
- Case Work Hub
- Transferring Claims

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 Day

For further information, contact FINEOS Training Services:

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