

COURSE OUTLINE – (FP10) PAYMENTS MANAGER

Overview

Payments Manager is our payment processing component that extends the functionality of FINEOS Claims Manager to manage all your claim payments. The Payments Manager GUI displays from within the claims and party view. Payments Manager provides your organisation with a unified approach to payment processing. Payments Manager stores payment information, coordinates payment schedules, and shares payment transaction information with other systems. Payments Manager provides an open database to external systems to allow easy extraction of payment information for reporting purposes

Objectives

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

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 Payments Manager component

Topics

Introduction and Overview

- Setting Up Basic Payment details

Payment Preferences

- Party Case Roles
- Setting Up Basic Payment details
- Applying COLA

Payment Amounts and Adjustments

- Applying Amounts
- Applying Payee Adjustments
- Applying Tiers

Due Creation Periods

- Creating Due Creation Periods
- Activating Due Creation Periods
- Due Events

Payment Processing

- Working with Overpayments



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- Working with Underpayments
- Recalculations
- Using the Process To Function
- Manual and Auto Approval of Dues
- Payment Alterations
- Ad Hoc Payments
- Single Due Payments
- Payment Schedules

Pre-requisites

Attendance at our Claims Manager Training Modules is mandatory prior to undertaking this course.

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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