

## COURSE OUTLINE – (FTB-C-003)

### FINEOS GUI USAGE - CLAIMS

#### Overview

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The ***FINEOS GUI Usage - Claims*** course explains the main concepts behind FINEOS Claims Manager and how it manages claims and benefits information. The course includes exercises to demonstrate how to manage claim data, documents, benefits and parties.

#### Objectives

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To provide attendees with an understanding of the claims functionality contained in the FINEOS application.

At the end of this course participants should know how to do the following:

- Search for claims and benefits
- Create claims
- Manage claims
- Manage motor accident claims
- Create benefits
- Manage benefits
- Manage services and expenses
- Process claims and benefits

#### Who should attend?

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Anyone involved in the development, testing and use of Claims Manager

- Software Engineers
- Test Engineers
- Business Analysts
- Business and Technical Consultants

#### Pre-requisites

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**Courses:**

- FTB-F-001 – FINEOS GUI Overview - Front Office
- FTB-F-002 – FINEOS Configuration Overview – Front Office
- FTB-F-003 – FINEOS Basic Navigation

## Course Content

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### Module 1: Introduction to FINEOS Claims Manager

- Claims Manager Functionality
- How Claims Manager Works
- How Claims Manager stores information
- Navigating between claims and benefits
- Claims Manager icons

### Module 2: Searching for claims and benefits

- Searching by personal information to access a claim or benefit record
- Searching by organizational information to access a claim or benefit record
- Searching by case or policy number to access a claim or benefit record
- Searching by person and policy information to access a claim record
- Accessing a claim or benefit record from an open party record
- Accessing a benefit record from a claim record
- Accessing recently viewed claim, benefit, or party record

### Module 3: Creating claims

- Methods of creating claims
- Linking parties to a claims
- Linking contracts to a claim

### Module 4: Managing claims

- Adding a party to a claim
- Managing party contacts/interactions within the claim
- Managing contracts
- Identifying potential benefits (benefit rights)
- Editing general claim details
- Managing sub-cases for a claim
- Managing medical authorization, treatments, and conditions
- Managing hospitalization visits
- Managing restrictions and limitations
- Managing diagnoses
- Managing treatment codes
- Managing estimated recovery durations
- Adding occupation and earnings information to a claim
- Managing insured's employment details
- Managing disability recovery details
- Managing financial assessments

- Managing social security
- Managing reserves and recoveries
- Viewing your claims
- Transferring a claim to a different department
- Transferring a claim to a different user

**Module 5: Managing motor accident claims**

- Editing motor accident details
- Editing primary vehicle details
- Managing other involved vehicles
- Managing damaged property details
- Managing involved parties
- Managing policies
- Managing subjects of insurance for motor claims
- Managing reserves and recoveries for motor claims

**Module 6: Creating benefits**

- Creating a benefit based on a benefit right
- Creating a stand-alone benefit

**Module 7: Managing benefits**

- Adding a party to a benefit
- Managing party contacts within the benefit
- Editing general benefit details
- Adding legal details to a benefit
- Adding authorization amounts to a benefit
- Managing sub-benefits (additional riders or supplementary benefits)
- Managing sub-cases for a benefit
- Managing the definition of disability
- Managing disability impairments
- Managing activity periods
- Viewing a benefit summary
- Viewing your benefits
- Transferring a benefit to a different department
- Transferring a benefit to a different user

**Module 8: Managing services and expenses**

- Managing services
- Searching for a service or expense
- Managing expenses




**Module 9: Processing claims and benefits**

- Managing tasks
- Triggering frequently performed functions
- Managing documents

**Format & Duration**

Delivery	Tutor-Led Practical	Duration	1 Day
<b>Description</b>			
The desired effect for participants on completion of this course is an acquisition of skills i.e. to <b>'KNOW'</b> how to use a particular area of the FINEOS product. Participants are led through practical exercises relevant to the particular skills area directed and assisted by the tutor.			

**For further information, contact FINEOS Training Services:**

 <a href="mailto:training.services@FINEOS.com">training.services@FINEOS.com</a>  +353 (0)1 639 9700	 Training Services, FINEOS Corporation, Pembroke House, 8-10 Lwr Pembroke St, Dublin 2, Ireland
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