FINEOS Global Training Services

COURSE OUTLINE – (FTB-C-003)

FINEOS CLAIMS OVERVIEW

About This Course

The **FINEOS Claims Overview** course takes participants through the use of the FINEOS case, claim, customer and workflow management functionality from the end-user perspective.

Course Objectives

After completing this course, trainees will gain the skills to:

- Navigate the FINEOS application
- Manage customer information
- Add and manage cases
- Add and process claims
- Manage tasks and workflow

Who Should Attend?

Anyone seeking hands on experience of the FINEOS components from an end-user perspective.

Pre-requisites

N/A

Course Content

Module	Description
Basic Navigation	This module takes users through the FINEOS application and enables them to navigate around the application. It familiarises the user with the look and feel of the FINEOS application.
Using Customer Manager	Customer service is a key aspect to any institution's business strategy, regardless of industry or line of business. And to provide superior customer service, institutions need comprehensive, up-to-date information on those customers. Customer Manager integrates customer information from all parts of an enterprise and presents it in a single interface. This module demonstrates common CRM functions such as managing

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	contact with customers, modifying personal details and setting personal and professional relationships between parties on the system.
Using Case Manager	FINEOS has engineered its innovative, enterprise software solutions to provide comprehensive case management. Through the structuring and consolidation of information, FINEOS solutions can provide automatic straight-through processing and a single-view of the customer. This hands-on module involves trainees working with electronic case files that can be used to manage all case-related work, including forms, documents, in-bound and out-bound inquiries, and financial transactions.
Using Claims Manager	FINEOS Claims is designed with a high level of standard business functionality and content to provide direct, measurable claims management improvements. Engineered to provide maximum flexibility and extensibility, FINEOS Claims can be implemented within a single line of business, across multiple lines of business to provide a single platform for claims management, or as the foundation for a broader enterprise transformation project. Trainees are shown how to manage and process claims on the FINEOS application, in this hands-on module. They are provided with detailed information on how to manage a claim and create corresponding benefits. It takes trainees through the lifecycle of a claim from set up to end and demonstrates how to manage general claim details, policies, and medical information including diagnosis codes and treatment codes.
Using Process Manager	Process Manager is based on your business rules so that work is completed according to your best business practices. In most cases, work can be processed automatically, supporting auto-adjudication and removing the need for manual intervention and reducing the chance of human error. In cases where work needs to be handled by a specialist, work is routed according to authority and skill level. Interaction with customers, providers, and other third-parties can be scripted, ensuring that representatives comply with your business practices. This module allows trainees to work with task and processes and manage work queues, transferring work items and understanding how work can be routed in the FINEOS application. The module gives trainees an understanding of how end-users in different roles in their organisation will

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	interact with the FINEOS application on a day-to-day basis.

Format & Duration

Delivery	Tutor-Led Practical	Duration	3 Days
Description			
The desired effect for participants on completion of this course is an acquisition of skills i.e. to **'KNOW'** 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:

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