

# SIG Managing Claims

## Course Summary

*The target audience for this session is the manager and/or staff member responsible for entering, updating, and paying claims and generating Loss Reports. This session is an in-depth demonstration and discussion on the Claims module.*

## Course learning Outcomes/Competencies

After attending this session, you will understand.

- ◆ *Configure the Kind of Loss Setup*
- ◆ *Enter Customer Loss History*
- ◆ *Enter Claim Information on Habitational and Automobile Applications.*
- ◆ *Enter, Update and Manage Property, Automobile and General Liability Loss Notices*
- ◆ *Manage Paying Claims*
- ◆ *Run Claims Reports*

**Resources:** SIG User Guides

## Course Outline

### Kind of Loss Setup

- Purpose and Benefit
- Active / Inactive Choices

### Customer Loss History

- Add a Prior Loss
- Updating Options

### Claim Information on Property and Automobile Applications

- Type Claim Information
- Browse to Customer Loss History
- Update Customer Loss History

## **Property Loss Notice**

- Add the Loss Notice
- Print or Email the Loss Notice
- Update the Loss Notice with Payment Information
- Pay the Loss Notice

## **Automobile Loss Notice**

- Add the Loss Notice
- Print or Email the Loss Notice
- Update the Loss Notice with Payment Information
- Pay the Loss Notice

## **General Liability Loss Notice**

- Add the Loss Notice
- Print or Email the Loss Notice
- Update the Loss Notice with Payment Information
- Pay the Loss Notice

## **Claim Management Report**

- Report Request Options
- View the Report
- Export and Use the Excel Pivot Table Feature to Format the Report