FSC Manager

» Follow Ups

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Introduction

This area of the FSC Manager is similar to an internal messaging system. A user can make a Follow Up for themselves or another user(s) for today or in the future, and the Follow Up will appear on that user's Follow Up list. The Follow Up list is a "to do" list for each user. Follow ups can be prioritized with a status of high, normal, or low. When a Follow Up is linked to a client in the system, the Follow Up information automatically records to the client's Tranlog. Using the Follow Up system is an important way of making sure that work gets done in a timely manner. This chapter explains how to create, retrieve and resolve a Follow Up and how to run a Follow Up Report.

Follow Ups

How to Create a Follow Up

Follow Ups can be created from various locations: Main screen, Client screen, Applications, Forms, Memos, and Tranlogs.

1. Click on the Follow Up button  from one of the locations above.
2. If starting the Follow Up from a Client/Application/Form, it will automatically be associated with the client that is open.

   If creating a Follow Up from the Main screen, click on the *Select Client* button to link the follow up to a particular client and copy the name into the body of the Follow Up. Follow Ups can be made without selecting a client or policy, but then the information will never display in the Tranlog for that client.
3. The *Select Policy* button will allow the user to associate the Follow Up with a particular policy and will copy the policy number into the body of the Follow Up.
4. Select a user for the *To* field. Use the ellipse button to pull up a list of system users. Highlight a user or hold the Control key down and highlight multiple users. Click *OK*.
5. Enter a Follow Up *Date*. A Follow Up *Time* is optional.
6. Select a *Category* from the drop down list. This can be very useful when looking through the Follow Up list. The list can be sorted by category and provides the user with a quick reminder of what the Follow Up is regarding.
7. Type a *Subject* and then the body of the Follow Up.
8. Select a *Priority* of *High, Normal* or *Low*. High priority Follow Ups appear on the Follow Up list in red text, normal in black and low in blue.
9. If a piece of paper is going to be placed in the file cabinet or attached to the customer's file, put a *Yes* in the *Paper Filed* field.
10. Click *OK* to save and exit. The Follow Up list on the Main screen refreshes every five minutes.

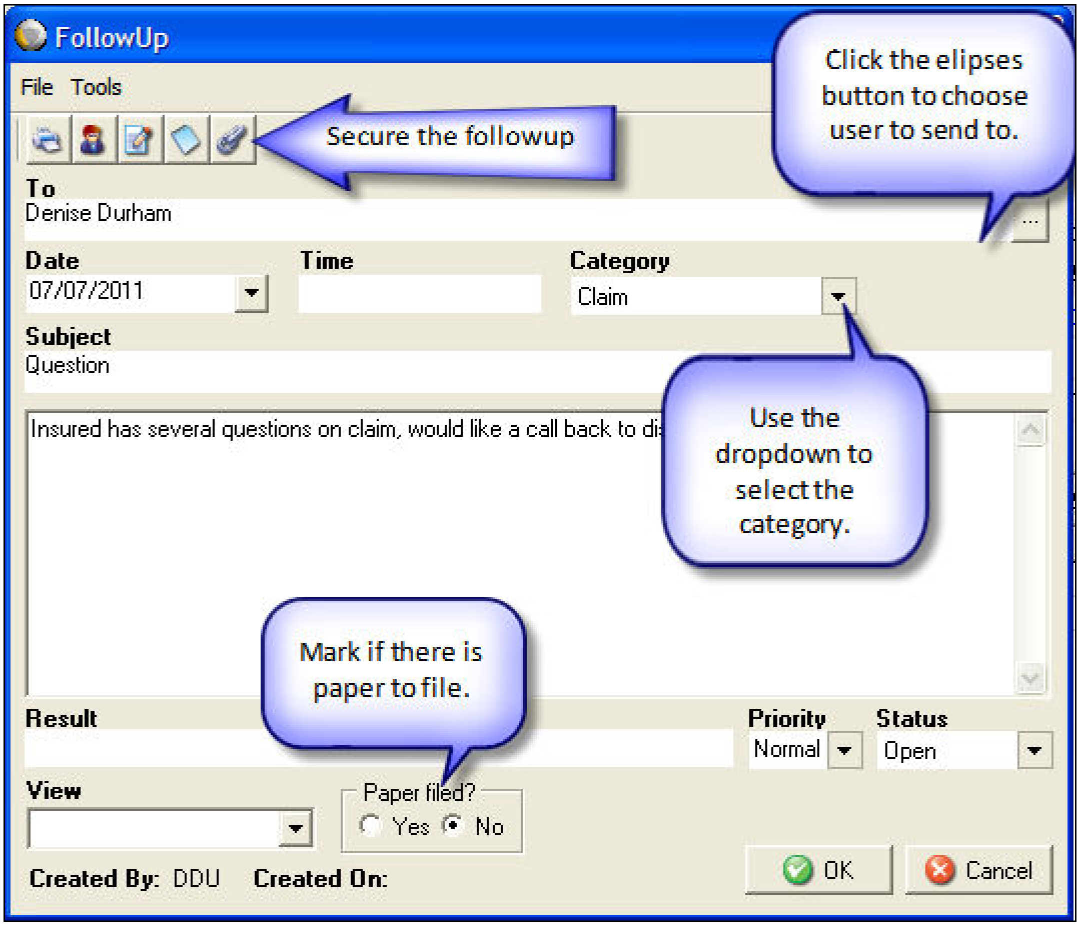

Figure 1: Follow Up Screen

How to Retrieve a Follow Up

Once a Follow up has been created, it can be accessed it two ways: at the Follow Up area on the Main screen or from the Client screen, *Follow Ups* tab.

Main Screen

When a user logs into the Manager, the bottom right hand corner displays a list of Follow Ups for that user. Users may view other users' Follow Ups by selecting a different user from the *User* dropdown.

The *Category* filter defaults to all, but can be changed to view a specific category.

Days forward allows users to view all the Follow Ups due within that amount of days and those that are past due. If *Days forward* is set to 0, only Follow ups that are due today or that are past due will display.

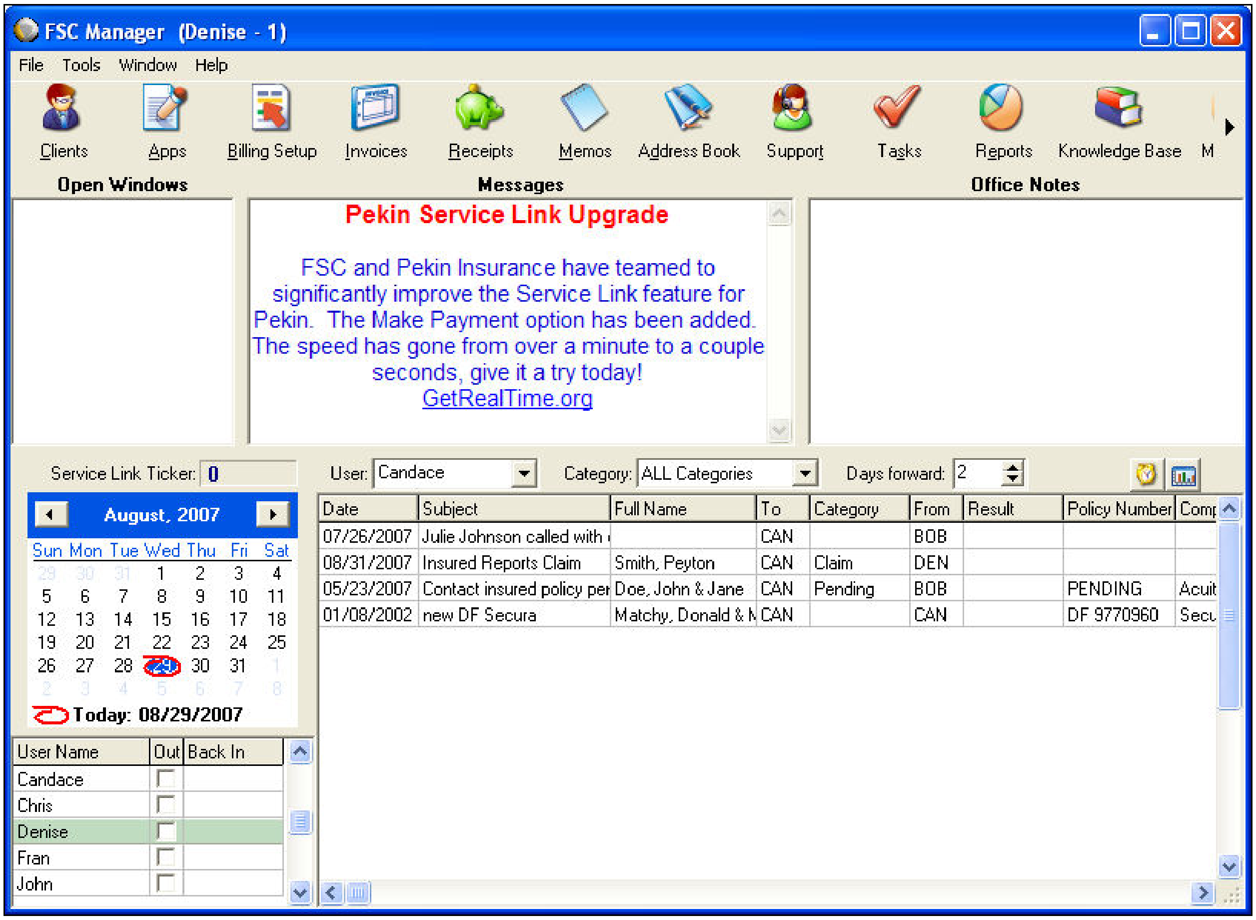

Figure 2: Manager Main Screen

All Follow ups on this screen will be in date order. To change the sort order, click on the column header. Columns can be re-arranged by clicking the column header and dragging it to the desired position. Column widths can be changed clicking the edge of the column header and dragging it right or left. These settings are saved per user.

Double click on a Follow Up to open and view the contents.

Client Screen

Follow Ups for an individual client are visible on the Follow Ups tab of the Client screen. The Follow Up tab turns yellow if there are Follow Ups that are past due or due within a certain number of days in the future.

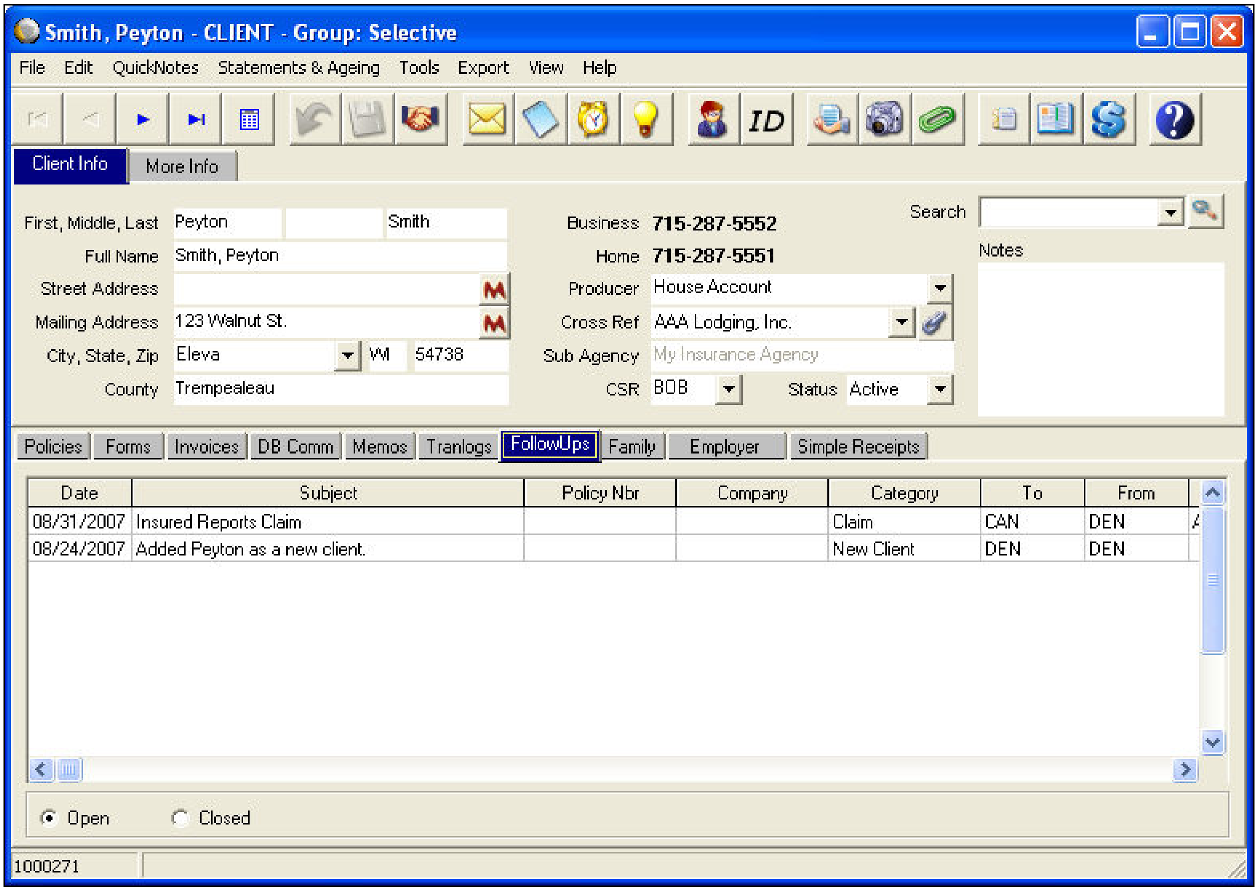

Figure 3: Client Screen/Follow Up Tab

Follow Ups always appear in date order. This tab defaults to display *Open* Follow Ups. To view *Closed* (resolved) Follow Ups, click on the *Closed* option at the bottom of the screen. Double click on a Follow Up to open and view the contents.

How to Secure a Follow Up

Users licensed for Life, Health or Securities will be able to secure Follow Ups, so that only licensed users may view Follow Ups related to that line of business. **To set security for Life, Health and Securities see Chapter 2 – System Setup.** Non-licensed users will not have access to secured Follow Ups.

Follow Ups created in the following ways will be secured automatically:

1. Create the Follow Up directly from the (secured) policy screen
2. Highlight the secured policy before creating the Follow Up
3. Use the *Policy Select* button in the Follow Up

To Manually secure a Follow Up:

1. Open the Follow Up to be secured

2. Click the *Secure* icon
3. Select the security relation and click *OK*.

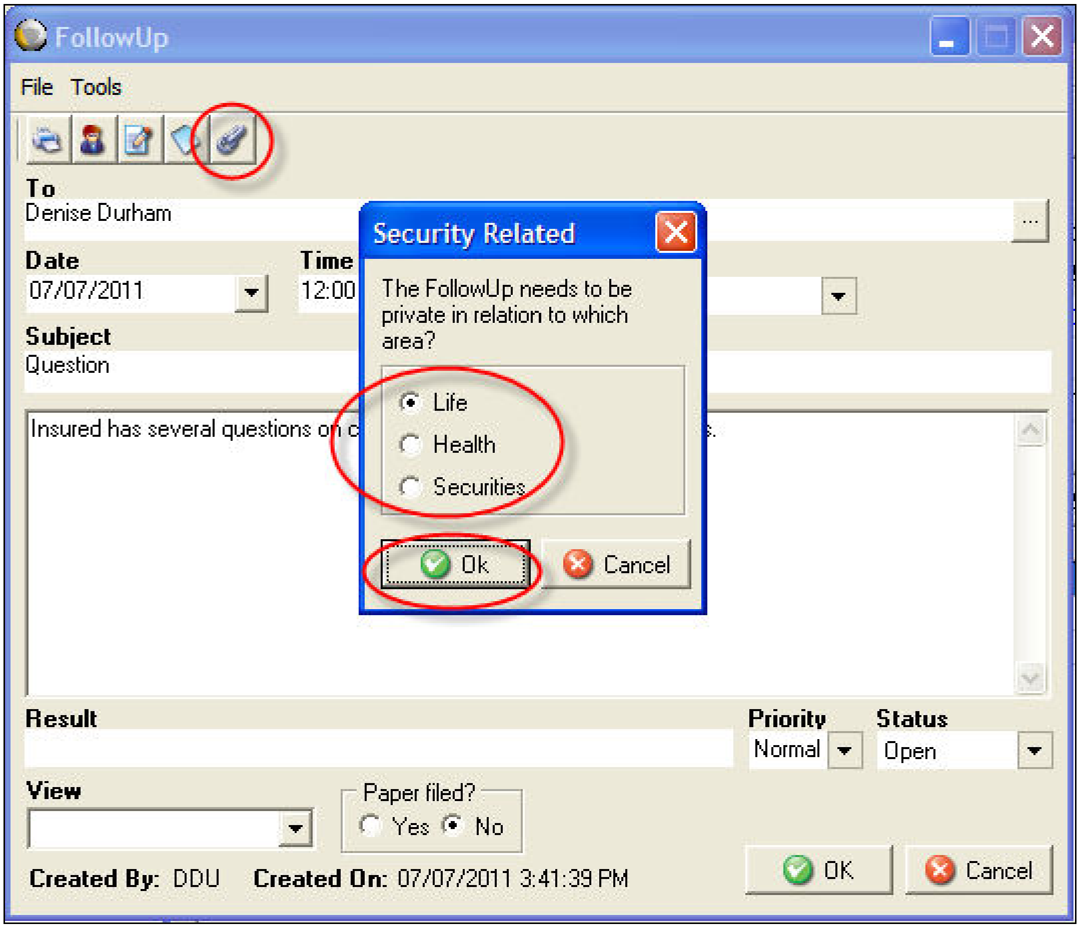

Figure 4: Follow Up Securities

<u>Secure Follow Ups may only be directed to users that are licensed in the appropriate product.</u>

How to Resolve a Follow Up

1. Open up the Follow Up.
2. Use the *View* dropdown to see the *Client, Policy* or *Images* associated with this Follow Up.
3. Enter information on actions taken to resolve the Follow Up in the *Results* field. When a Follow Up is closed, all the information will be recorded in a new Tranlog with the Results information at the top of the Tranlog.
4. Change the *Status* to *Closed*.

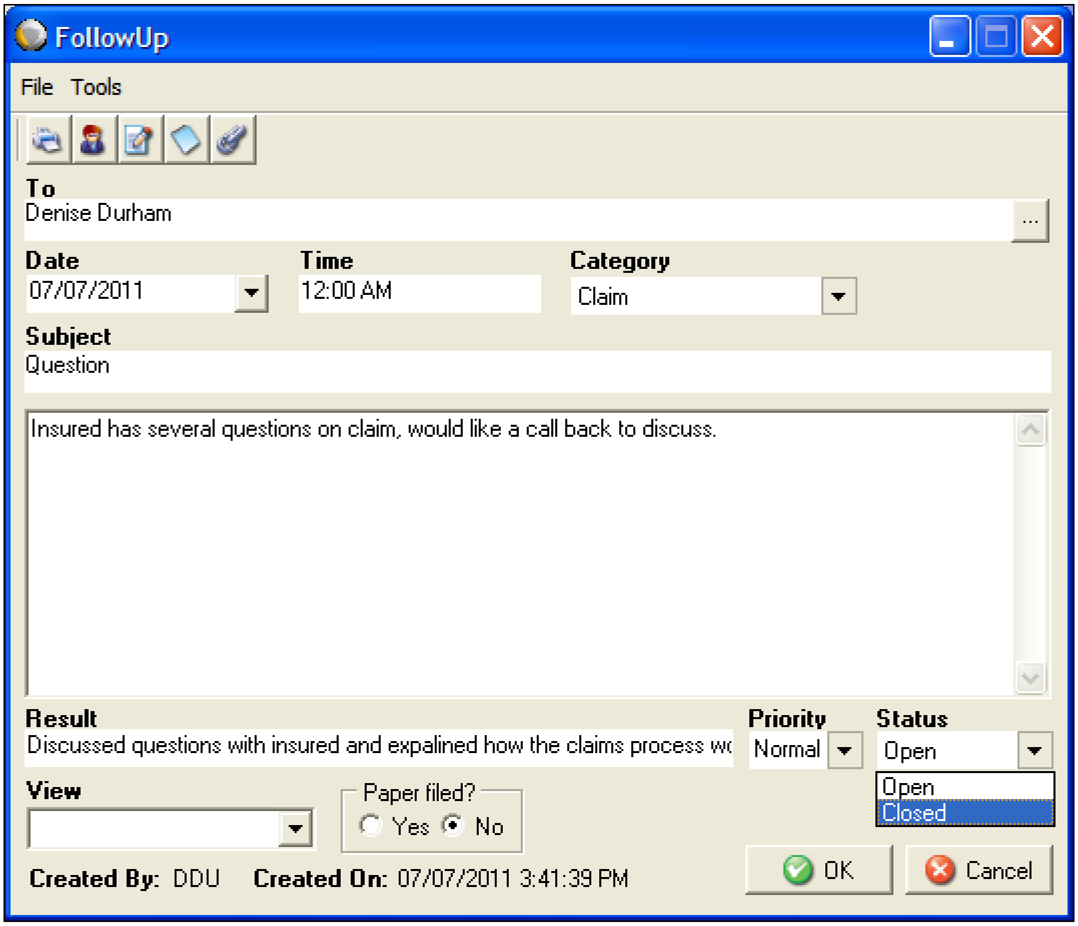

Figure 5: Follow Up Screen

3. Click *OK*. This will remove the Follow up from the Main screen area when it is refreshed. The Follow Up is now viewable on the *Follow Up* Tab in Clients under *Closed*.

Editing a Follow Up

Follow ups can be opened and changed. This is often done when the Follow Up needs to be directed to a different user, if the Follow Up needs to be postponed, or if the user wanted to add additional notes to the body of the Follow Up. If the user only changes the *To* field, *Date*, *Time*, *Category* or *Priority*, the Follow up will **not** record to the Tranlog again. However, if the *Subject, Body, Result* or *Status* fields are changed, this will trigger the system to copy the Follow Up information into a new Tranlog for E & O purposes.

How to Create a Follow Up Report

A Follow Up report is useful when a user needs to be working outside of the office. Their Follow Up, “to do” list, can be printed and taken with them. Don’t forget that the user still needs to resolve the Follow Up in the system.

1. From the Main screen, click the Follow up Report button.

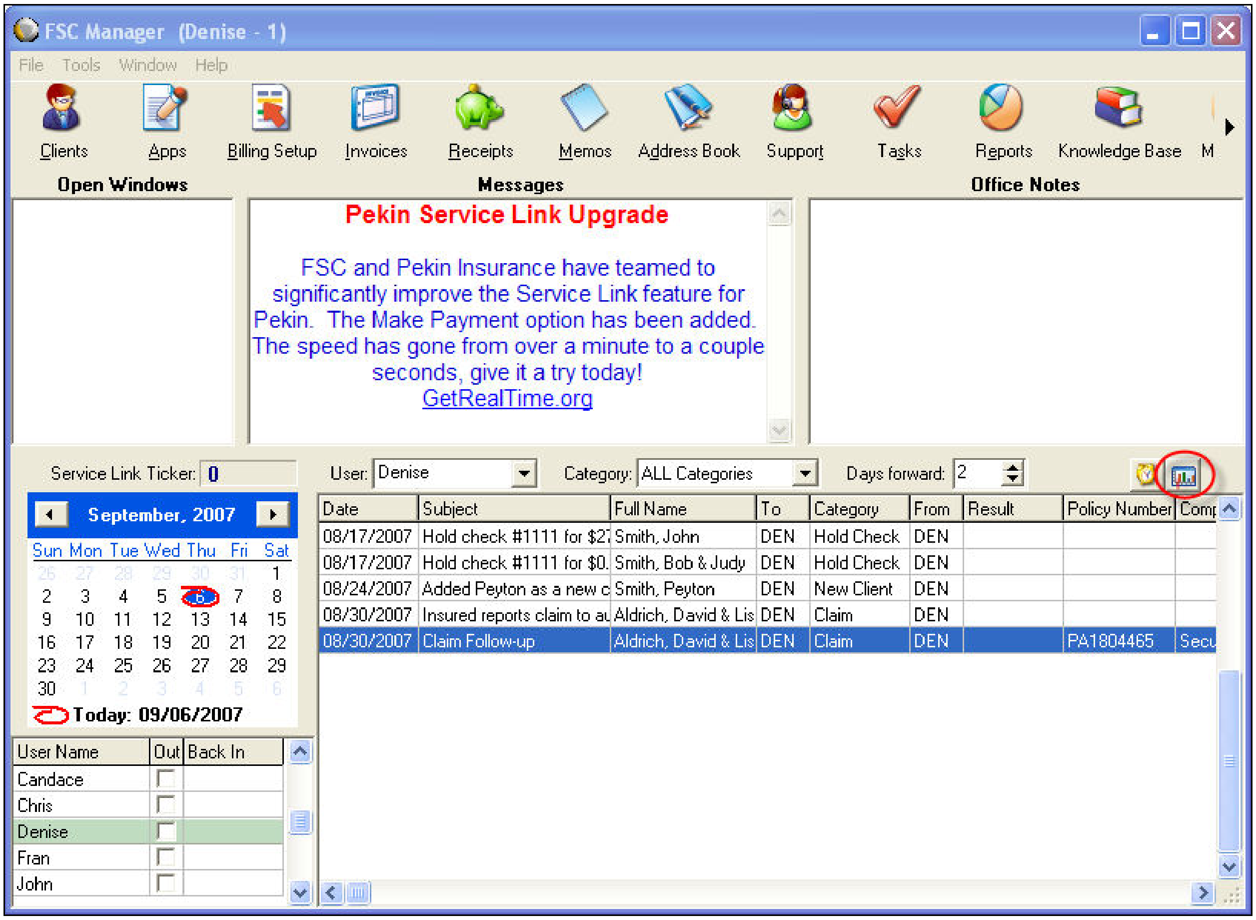

Figure 6: Follow Up Report Button

The report will show the Follow Ups in the same order that they appear on the Main screen. To view a different user's report or a report for all users, change the *User* drop down. To change the sort order, click on the column header. Columns can be re-arranged by clicking the column header and dragging it to the desired position. Column widths can be changed clicking the edge of the column header and dragging it right or left. Once these are arranged properly, run the report.

Follow Up Report

Print Date: 11/03/2010
Printed By: DEN

From	Name	Date	Category	Policy #	Subject
Denise Durhai	Durham, Denise & Steve	03/24/2009	Claim		Insured reports Auto claim
	Please follow up with insured and verify that she has been contacted by an adjuster.				
Denise Durhai	Durham, Denise & Steve	03/31/2009	Claim		Insured called in to report auto claim. Had her call the c
	Insured called in to report auto claim. Had her call the carrier 800# to report and set a follow up to verify she go this reported.				
Denise Durhai	Durham, Denise & Steve-D	09/04/2009	Claim		Home Claim
	Insured called in to report hail damage to roof. She needs a call from Adjuster immediately as the roof is leaking into MBedroom. Please follow up to verify adjuster has made contact				
Denise Durhai	Durham, Denise & Steve-D	09/15/2009	Claim		Insured called in to report hail damage to home, needs a
	Insured called in to report hail damage to home, needs an adjuster asap. Did claim form online at carrier website and will set a followup to check on status of adjuster. Please follow up with insured to verify contact by adjuster w/i 24 hours.				
Denise Durhai	Durham, Denise	03/02/2010	Conversation		Insured called in has roof damage from hail storm. Isn't
	Insured called in has roof damage from hail storm. Isn't sure if it will be more than deductible, has a roofer coming out to look at it tomorrow. Will let us know if they need to submit a claim. Bobby: Please follow up on this.				

Count: 5

Figure 7: Follow up Report Preview

System Options

Follow Ups have two System Defaults. Go to *System* on the Banner and click on the *System Defaults* tab. These defaults apply to all users.

Single Tranlog on Followups from Memos – When this option is check marked, the entire body of a Memo will automatically populate into the Follow Up. Because the information is identical to the Memo, only one Tranlog will be created. When this option is not check marked, two Tranlogs will be created if a Follow Up is made from a Memo screen – one from the Memo and one from the Follow Up.

Auto Followup from Memo – When this option is check marked, the system assumes that all users will automatically want to do a Follow Up after a Memo. When the user closes the Memo screen, the Follow Up screen will appear automatically. The user can cancel the Follow Up if necessary. This same option is available on the Local Settings tab as a per user setting.

There are two local defaults. Go to *System* on the Banner and click on the *Local Defaults* tab. These defaults apply to each user.

Follow-Up Reminder on Client Screen ____ Days – Each user can set the number of days. This makes the Follow Up tab on the Client screen turn yellow if a Follow Up is due within the number of days determined in this field or are past due. Leaving it set to 0 means the Follow Up tab will only turn yellow if items are past due.

Auto Followup from Memo – This option is explained above. It can either be a system wide setting or can be an individual user setting.

Obtaining Support

If you have any questions about this training, please contact FSC Customer Support. Thank you and enjoy using FSC Manager!

West Coast Customer Support: 800-433-2550
Midwest Customer Support: 800-401-2895
Email: fscmanagersupport@fscsolutions.com

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