Notes

Lesson Objectives

By the end of this lesson, you should be able to:

- Describe the functionality of notes
- Work with notes

This lesson uses the notes section for additional explanation and information.
To view the notes in PowerPoint, choose View→Normal or View→Notes Page.
If you choose to print the notes for the lesson, be sure to select “Print hidden slides.”

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Lesson Outline

- Notes Basics
- Working with Notes

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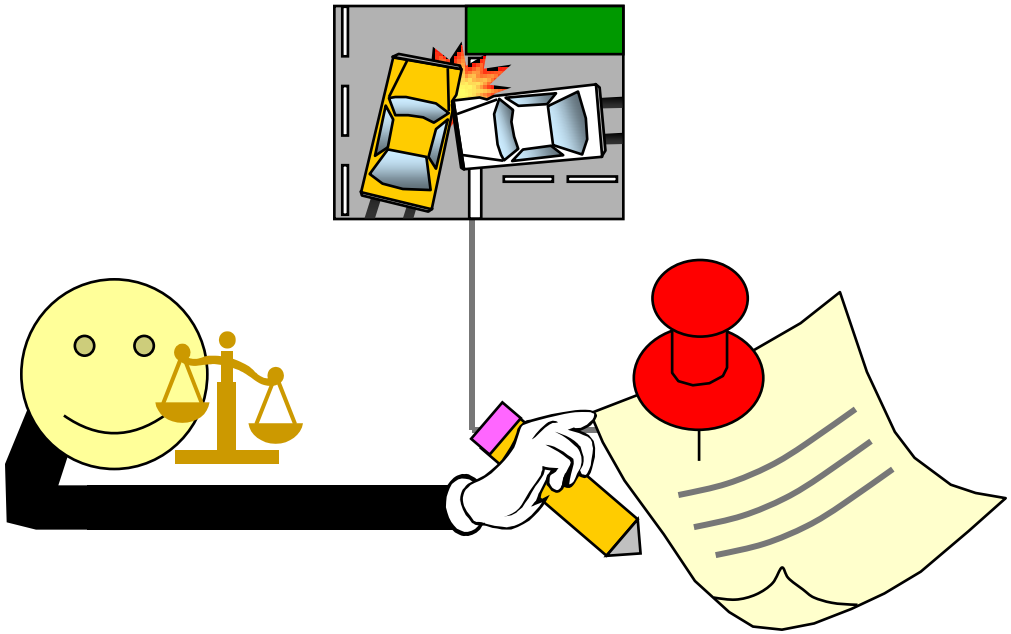
Notes



Claimant reported that the driver was a teenage boy, so there may be a question of coverage.

- A note is a detailed record of the actions or thinking behind the processing of a claim
  - Notes are typically created by users

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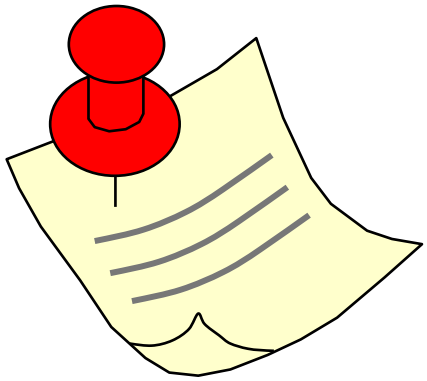
Note Fields



Topic:	**Coverage**
Subject:	**Coverage in question**
Related To:	**Entire claim**
Confidential:	**No**
Text:	**Claimant reported...**

- Topic - the general category of the note
- Subject - a short description of the note content
- Related To object - whether the note is appropriate to the entire claim or to a particular exposure or contact
- Confidential - whether the note is visible to everyone or to only you, your supervisors, and people with permission to view confidential notes
- Text - the text of the note itself

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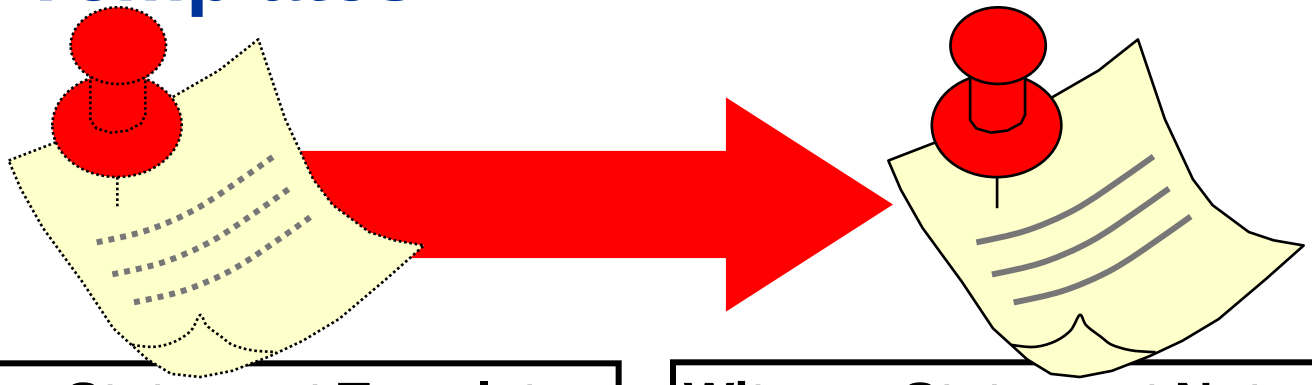
Note Templates



Witness Statement Template
Topic: Investigation
Text:
When did it occur?

Where did it occur?

Witness Statement Note
Topic: Investigation
Text:
When did it occur?
October 7 at 2:35 pm
Where did it occur?
The corner of 5th and Main

- A note template is a template for commonly created notes
  - A user can create a note using a template, which will automatically set the topic, set the subject, and/or add text to the text field

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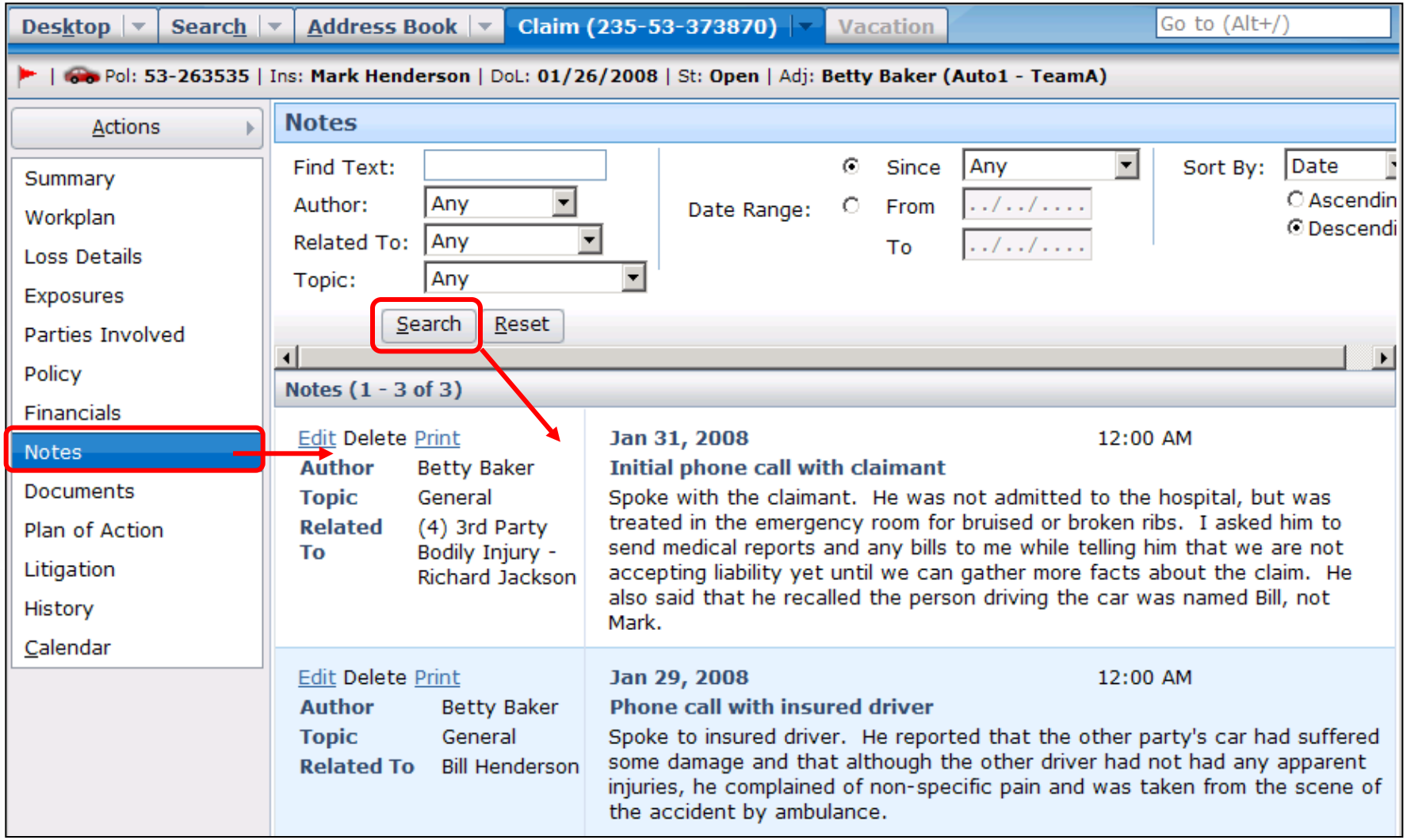
Viewing Notes



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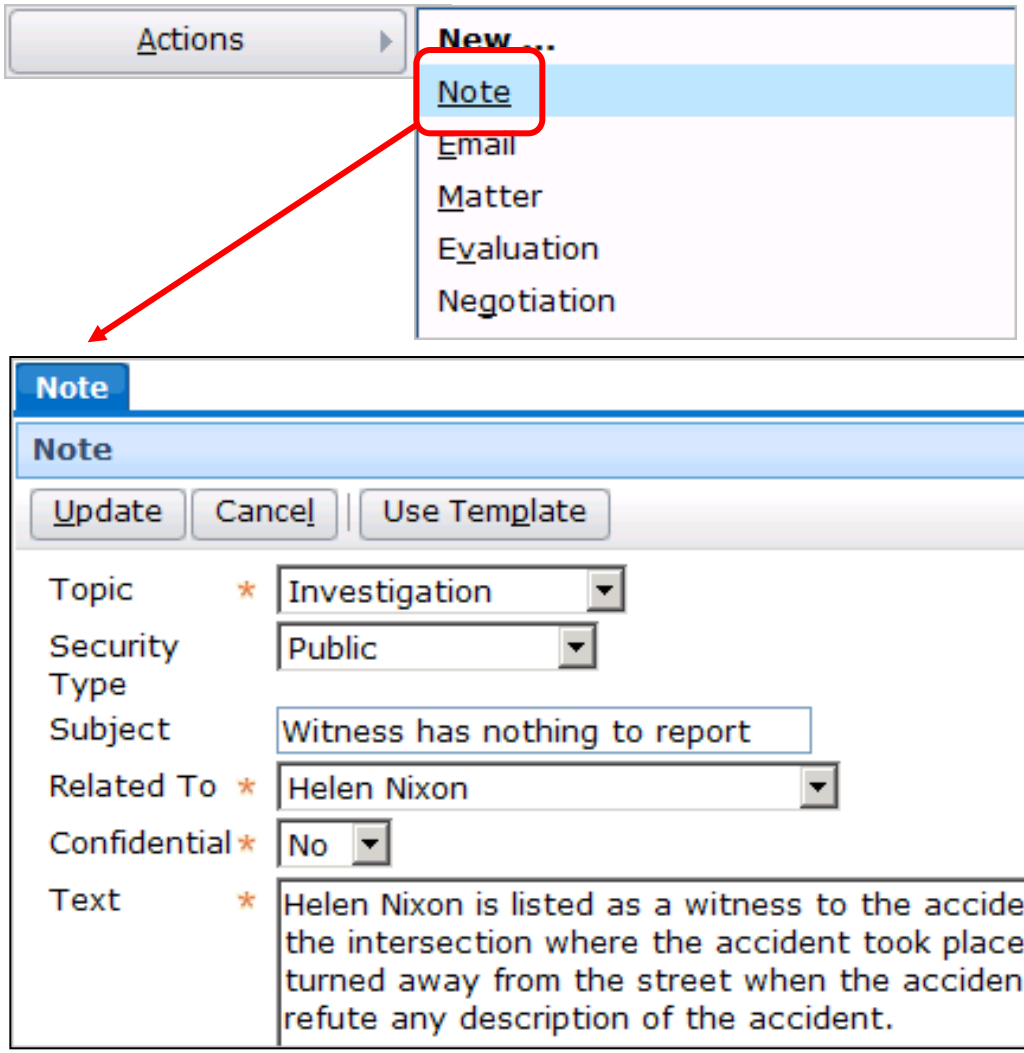
Adding Notes to a Claim



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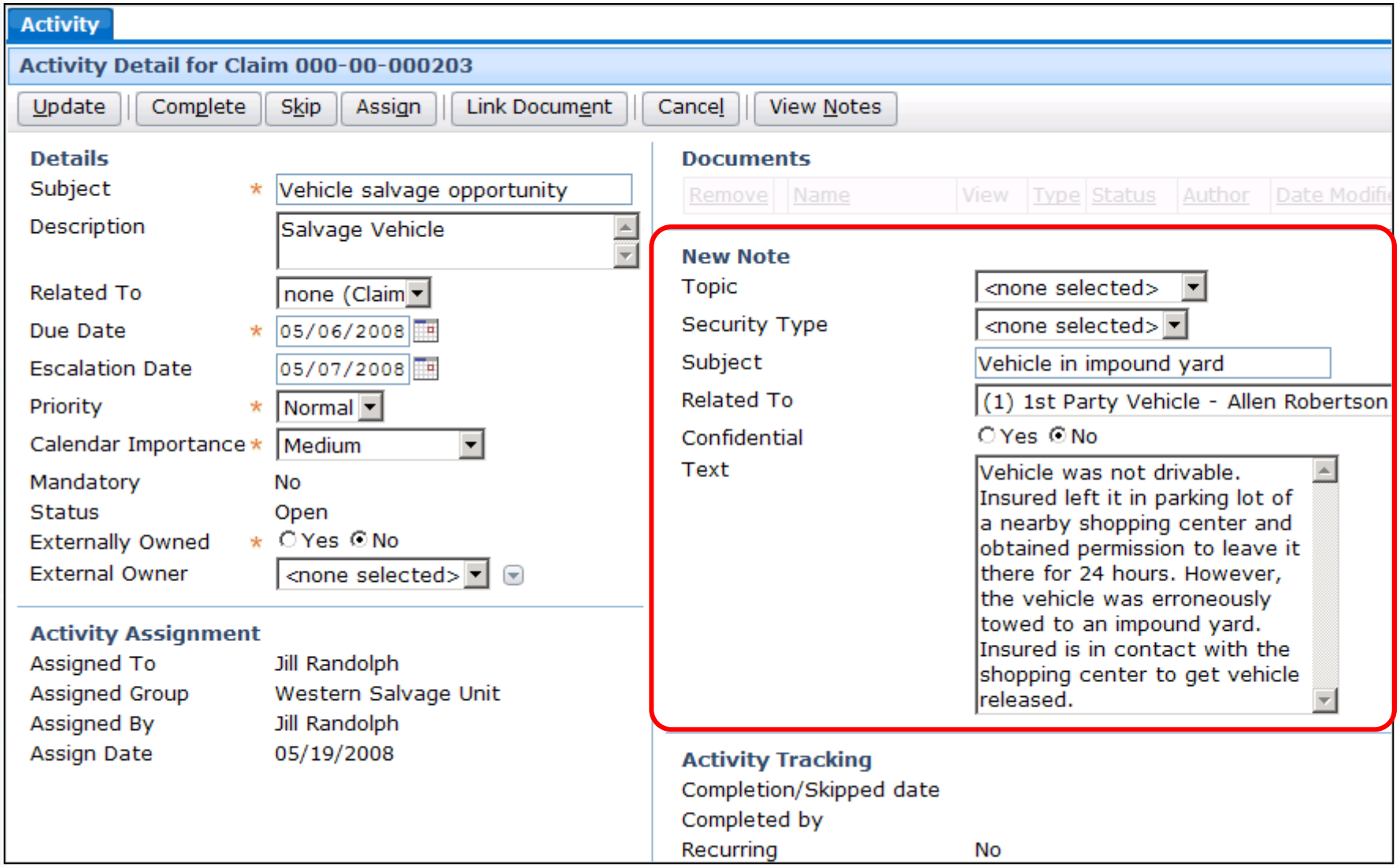
Adding Notes via an Activity



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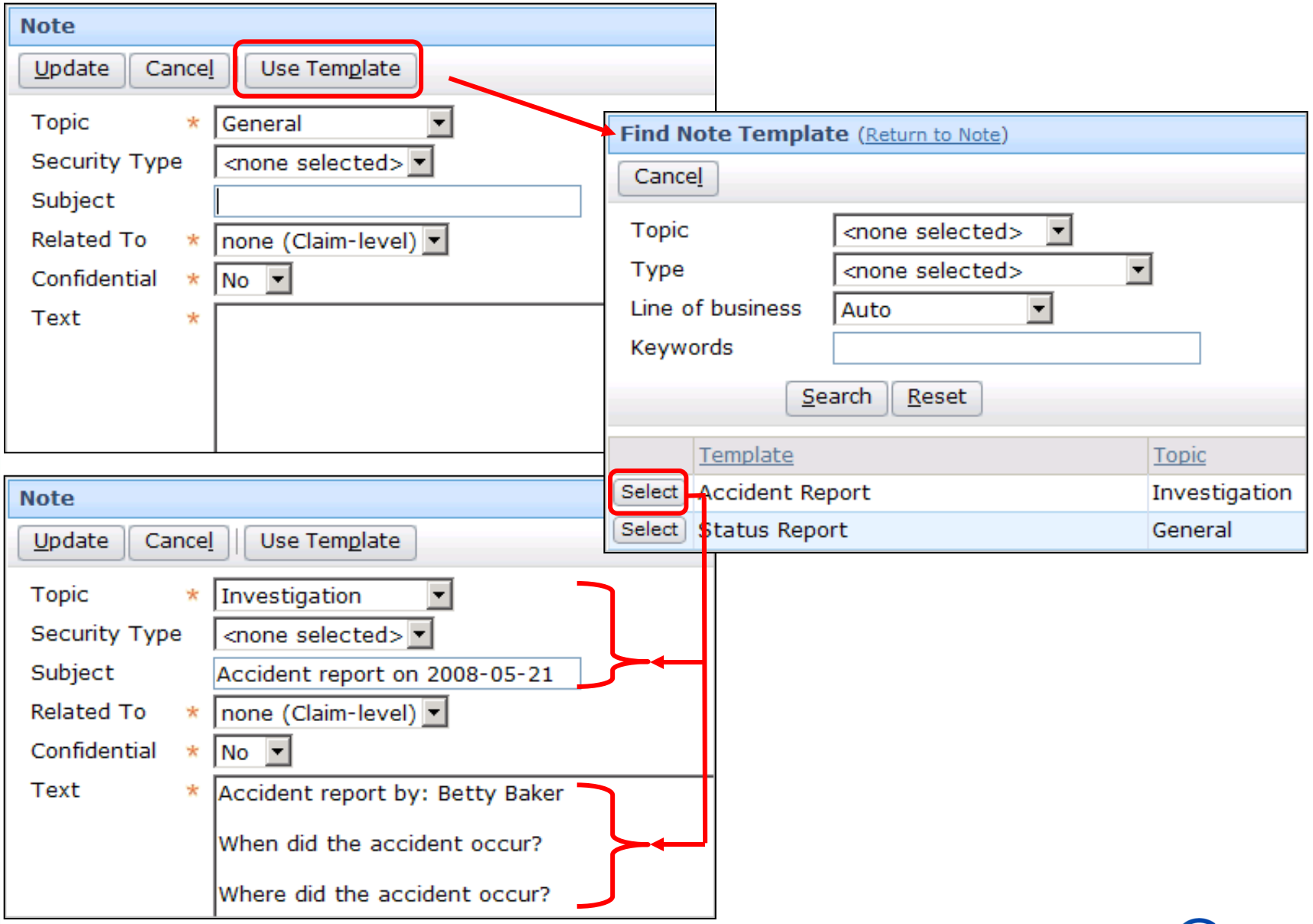
Using a Note Template



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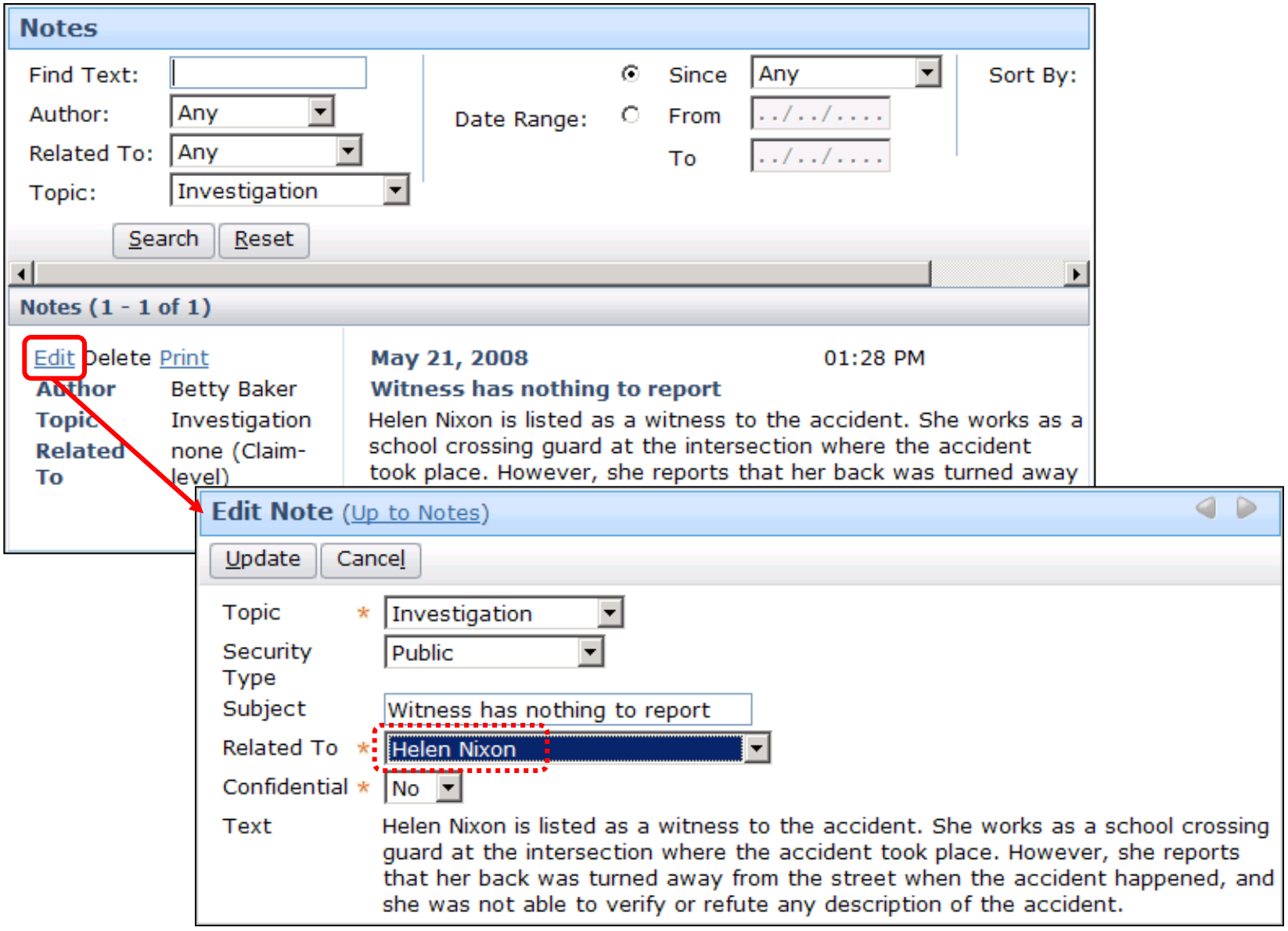
Editing Notes



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Lesson Objectives Review

You should now be able to:

- Describe the functionality of notes
- Work with notes

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Review Questions

For each of the following descriptions, identify if it is a description of activities, documents, and/or notes. Some descriptions apply to multiple types of objects.

1. It has an owner.
2. It involves integration to a third-party system.
3. In the base application, it has an attribute which, when selected, makes it viewable only by you, your supervisors, and people with the appropriate permissions.
4. You can specify that it pertains to the entire claim or to a single sub-object.
5. It has a MIME type.
6. It has a due date.
7. It can be created using a template.

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