
XACTANALYSIS TRAINING ONLINE COURSE OUTLINE

■ COURSE OVERVIEW:

- TRAINER INTRODUCTION
- SUMMARY OF COURSE AND OBJECTIVES
- WEB SESSION RULES AND EXPECTATIONS
- SCHEDULE AND TIMELINE
- CREATE XACTANALYSIS DESKTOP SHORTCUT\ADD TO FAVORITES

XACTANALYSIS WELCOME PAGE

- DATA SET
- CUSTOMIZE THESE OPTIONS
- QUICK SEARCH (ADVANCED SEARCH)
- RECENTLY VIEWED ASSIGNMENTS

TRAINER FEATURE DEMONSTRATION

■ USER ADMINISTRATION

- USER ADMIN
- QUALIFYING ADJUSTERS
- PERSONAL RULES
- PROGRAM RULES

■ ASSIGNMENT CYCLE:

- SEND WORK ASSIGNMENT \ EDI
- ASSIGNMENT QUEUE

■ ASSIGNMENT DETAILS:

- DETAILS
- CLIENT/POLICY
- MAP
- ACTION ITEMS
- NOTES
- DOCUMENTS
- PHOTOS
- SKETCH
- ACTIVITY LOG

■ ESTIMATE REVIEW QUEUE:

- FILTERS

- REVIEW QUEUE RULES

■ ACTIVITY REPORTS:

- DETAILED REPORT DESCRIPTION
- REPORT AREA
 1. GEOGRAPHIC
 2. INDIVIDUAL
- FILTER OPTIONS
 1. GEOGRAPHIC
 2. INDIVIDUAL
- CACHED REPORTS (REPORT LIBRARY)
- SELECTING A DATE RANGE
- OPEN CACHED REPORT AND DRILL DOWN

■ MANAGEMENT REPORTS

- SELECTING DIFFERENT DATA SETS AND TRADES
- REPORT OPTIONS:
 1. GRAPHICAL REPORTS (CHARACTERISTICS & DEMO)
 2. TEX REPORTS (CHARACTERISTICS & DEMO)
- CACHED REPORTS
- SELECTING A DATE RANGE
- OPEN CAHED REPORT AND DRILL DOWN

■ INDUSTRY TREND REPORTS

- REPORT TYPES
- SELECT LOCATION
- RESEARCH AND ANALYSIS OVERVIEW

■ REAL-TIME MANAGEMENT DASHBOARD

- CLAIM TRENDS
- ACTIVITY/VOLUME
- AUDITS
- PERFORMANCE
- USAGE

■ HELP OPTIONS

- WHAT'S NEW
- USERS GUIDE
- REAL-TIME TRAINING
- SUPPORT

■ CONCLUSION

- RECAP MATERIAL COVERED AS IT RELATES TO COURSE OBJECTIVES
- REINFORCEMENT TRAINING OPTIONS
- QUESTION AND ANSWER SESSION
- STUDENT FEEDBACK SURVEY