Applied Systems Client Network

SEMINAR HANDOUT

TAM TIPS FOR SUPERVISORS

Prepared for ASCnet

Applied Systems Client Network
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Objective: Review Tam Tips & Shortcuts that would help Managers/Supervisors.

Assumptions: This seminar is based on the following
TAM Version 9.X
Microsoft ® Word Version 2003

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HOME BASE

System Setup (Tools)

- Settings - Review All Available Options – Branding, Color Coding, E Filing, etc.
- E Filing – Prohibited Extensions set up here
- Miscellaneous – Bold Activity Categories

Help Button

- On Line Real-time Help – Shortcut to Support Chat

Activity Center

- Set up Security to see other's activities
- Include Date Entered as Viewable Column to catch "date bumpers"

CLIENT AREA

Programmable Columns

- Client List – show Csr to help sort mail
- Activity List – show amount, and policy type
- Policy List – show notes (helps with multiple GLs, Fire policies, etc.)

Options Button

- Learn to Right Mouse Click to get OPTIONS
- Learn to use Search Functions

Links

- Set up Under UTILITIES, SYSTEM ADMIN, DEFINE TAM LINKS

Realtime

- Usage is Critical. Print off list of what carriers have available from www.appliedsystems.com – Interface section.
- Get as much education as possible.

Client Detail

- Are you using TAM Integrated Email to send and attach in one step? You can set up email signatures under USER SETUP for each person. Outlook signatures will not default.

ACTIVITIES

- Set up Standard list of activity codes.
- Run "prohibited activity" report by taking your code list and excluding those activities from the report.
- Have department meetings for service staff where you attempt to read each other's activity documentation.
- Run Producer Activity Reports weekly to keep producers up to date on account activity.
- Use Activity reports (File/Print) for Client information (Stewardship Report)
- Use Outlook integration with activities for critical items you would like added to your Outlook calendar or task list. Activity will be added as a task item unless you indicate a time in the activity.

INFO SCREEN/CONTACTS

- Consider using
    - Date of 1st Coverage
    - SIC, NAIC Codes (they now have lookup and search features)
- Use Info Classes Under Contacts for mailings/invitations where you would like individual/personalized items to go to multiple client personnel – i.e. newsletter, Golf Tournament invitations, Christmas Cards.

CLAIMS

- Don't do more than you have to! Re-evaluate processes and procedures based on your carrier's switch to direct reporting, on-line claims lookup. Why maintain the information in your system when you can quickly find through Transformation Station. (Also Claims Download is available soon!)

ATTACHMENTS

- Categories & Subcategories need to be standardized. Don't just take defaults that list attachments by type of document (ex: EMAIL). Consider setting up your electronic file (ATTACHMENT SECTION) similar to the way you organized paper file. Categories like: POLICY, CLAIMS, BONDS, etc.
- Proposals – check out free proposals available from AB Solutions website – www.absolutionsinc.com
- Audit your category usage – You can run SEARCH of ATTACHMENTS section under REPORTS/SEARCH/ATTACHMENTS

REPORTS

- Exclude Rather than Include when selecting options
- Modify as few parameters as possible to get your list
- Save as User Defined
    - Title Report
    - Leave Notes for People who run reports
    - Right Mouse Click to make criteria required – can use ASK & RUN option.
- To Advance dates – left click on Month & Year in any date box (throughout system)

DOWNLOAD/PAPERLESS

- Set up Download Exceptions Report by Carrier, and Use them. Consider setting up a PREMIUM INCREASE activity (INCR) and add for CSR review from Download report.
- Download Commissions and Transact from Download available. (Make sure you understand the difference)
- Train staff to use Summaries of Insurance for quick account review. Summaries are available in every part of the system under the OPTIONS button.

UTILITIES

- Electronic Signature Available from ASCnet
- Prospects – Search For Duplicate Prospects (UT, General, Prospect)
- Pre-filled forms – UT- FORM – set up applications for common coverage, or agency standards for new business.
- Certificates – ability to import/export Cert Holders to and from Excel has been added in 9.0. (Utilities, Forms, Setup, Certificates
- You can set up Comm Log to store as an Excel Spreadsheet. Under Utilities, Company Interface, Misc. Download Utilties, Comm Log Setup
- Version 9.0 allows you to add Op ID and Who Codes up to 4 digits (instead of 2…which made you get very creative in setting up codes)
- Batch Rename CSR Utility is GONE! YEAH…No more changing all of history! CSR Workload Reassignment Utility changes current policies, open activities and open claims ONLY and does not overwrite CSR code on historical items…access in UTILITIES (outside of TAM), and then under GENERAL tab.