



Log Notes Overview

CMS enables you to create a permanent record of your agency's actions and contacts within the client files. These log notes create an important history for each client's requests and policy activity. Log notes are an important part of state-required record keeping and can be subpoenaed in the event of legal action. For this reason, they can be voided, but cannot be deleted.

Log Note Windowpane

Log notes are created in CMS when an action is taken on a client/policy by a user or from a carrier download. These notes contain information to document all changes made to the client/policy. Once created, these notes become a

Creating a Log Note

Most log notes are automatically generated as a result of transactions made in HawkSoft CMS, for example making changes to customer contact information, or recording a payment. Others can be initiated independent of any transaction

Creating a Batch Log Note

HawkSoft CMS enables you to use Report Generator to create a batch log note for selected client files. When the batch log note is created, you can set a Suspense, and/or Client Tag for further action.

For example, you might run a report that includes all clients with policies set to renew in the next 30 days. You could then set a Suspense for an agent/producer to contact each client and conduct an annual review.

Suspending a Log Note

HawkSoft CMS enables you to set a Suspense to a log note as a reminder for a specific user to follow-up with a client or on a transaction. The Suspense will appear on the assigned user's Suspense list. You can create a Suspense when completing a new log note on a new transaction, or on an existing log note.

Accessing and Working with Suspenses

Log notes can be suspended to a specific user as a reminder to take action or complete a task. Suspenses appear on the user's Suspense List the day they are due and remain on the list until closed or resuspended.

For convenience, you can open a Suspense directly from the client/policy, or you can review Suspenses from a Suspense List. The Suspense List enables you to view all Suspenses at once and includes filtering options to review Suspenses by Category or dates.

Client Tags

Client Tags can be applied to a client file to serve as a notification to any user that opens that client file. For example, you might want to add a Tag to indicate that the client speaks Spanish, is a VIP customer, or you might want to alert any user that the client has a returned check for non-sufficient funds.

Appending a Log Note

CMS enables you to modify an existing log note with additional comments by using the Append feature. Appending a log note is an excellent way to add information or an attachment that may have been left out of an original entry.

It should not be used to add NEW information.

Linking Log Notes (Note Log Notes can also be added or linked from the Attachments)

HawkSoft CMS enables you to link related log notes together. Each log note included in the link displays the contents of all of the log notes linked to it.

Linking log notes gives you a more complete picture of your prior interactions with policy holders by grouping related log notes together and reading them in chronological order.

Moving a Log Note

HawkSoft CMS enables you to move a log note from one policy or client file to another. This is useful when documentation is accidentally entered into the wrong client file or policy. Log notes are not literally "moved". Instead, you first copy the existing log note to the destination client file or policy, and then void the original entry.

Voiding a Log Note

Transactions, and the notes that describe them, cannot be deleted from HawkSoft CMS. Log notes, however, can be voided. Voiding a log note hides it from view in the log note window pane, but it will always be available for you to view, if needed.

Scratch Pad

Scratch Pad serves the purpose of a notepad built into CMS.

Scratch Pad has basic options, such as copy, paste, and print for your notes. ScratchPad is commonly used to paste comments or other information into a log note.

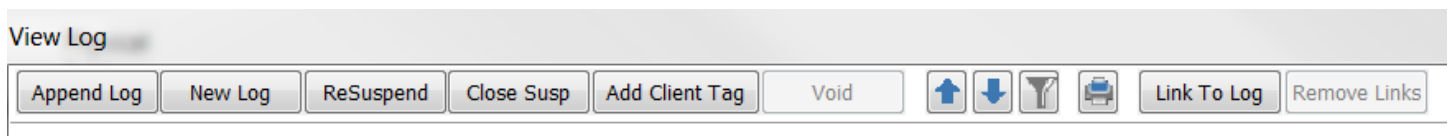
Log Note Templates

Log Note Templates can be created from the Customized List. These templates can be titled a description to match a specific workflow. Once you have set up these templates, they can be used each time a log note is created by clicking the 'Pencil' in the log note. Great for repetitive tasks!

Notes - Working with Log Notes & Suspense (A.T. Best Practices)

There are many different ways you can access Log Notes & Suspenses and how to close or resuspend the log notes. For convenience, you can open a Suspense directly from the client/policy, or you can review Suspenses from a Suspense List.

Below find the Log Options and Suspense options:



Append Log - Only to be used when it is needed to add information or an attachment that may have been left out of an original entry. It will maintain the original log description and log date and add '++' after the log note to indicate appending.

New Log – (Best Practice to Link two or more log notes together) New log will create a new log and automatically Link to the existing Log Note

ReSuspend - Resuspending a log note will maintain the original log description and log date.

Close Suspense - Close suspense will 1) close the existing suspense 2) it will also give the user the opportunity to create a new log with a new log description and date. The new log can be suspended again to preserve the new information, current date and Link the logs together.

Link to Log - Link to log should be used when a new log is created that should be associated with an existing log note. It is also a good way to close a suspense. IE: A cancellation is suspended and the reinstatement is issued. Link the reinstatement log note to the cancellation log note and then close the suspense of the cancellation.

Search Log Notes – Easily find key works using the search function

Uncheck 'Show Logs for all Policies' – Allow logs for only specific policy – makes working with log notes easier and more concise

'Click the Clock' - Clicking on the clock icon on the column header/tool bar, will bring all open suspense to the top of the log notes to see all open logs.

The screenshot shows a table with columns: #, Date & Time, User, Susp For, Susp Due, Pol, and Log. The table contains three rows of data. A callout box points to a clock icon next to the first row, and another callout box points to the 'User' column header.

#	Date & Time	User	Susp For	Susp Due	Pol	Log
367	03/30/2020 16:04	DMI	GEW	05/29/2020	0	Phone From Ins Commn Pol
366	03/25/2020 11:26	B			1	Carrier Submission ** Delet
	03/25/2020 11:0	B	BBB	03/25/2020	1	Create Submission ** Expec

Callout 1: A clock appears next to log notes with a future Suspense. If the Suspense is due or past due, the clock is red.

Callout 2: This column displays the user initials of the individual the log note is suspended to.