



The Beyontec Suite's Notes & Diary functions are more than just ways to document and follow-up on necessary tasks: They actually automate communication. Driven by the business-rules engine, they document files and set follow-ups based on user and system events you set up. A yellow sticky note next to a policy or claim number indicates Notes and/or Diaries exist.

Existing Notes & Diaries are shown in the upper left window of the Suite's transaction screen, with the newest entries at the top. Users can see the subject, who created the entry, and the follow-up date for diaries. System-generated diaries based on user and system events help ensure regulatory compliance. Filters at the top of the screen enable easy searching for particular entries. And the color legend at the bottom of the screen shows whether the Note or Diary was created by a user or the system.

Automated Risk-Selection Refined

You determine who can see Notes & Diaries. The native Security feature lets you ensure sensitive information is seen only by those with proper authority. For example, Litigation Notes may only be seen by company counsel and

management, while sensitive Underwriting notes can't be seen by CSRs and Agents.

Users can also communicate by sending Notes & Diaries to each other, including co-workers, agents, and policyholders. The Diary function ensures that users follow-up on requests so they don't fall through the cracks. And it allows documents to be attached to these items as well, reducing the need for separate e-mail or snail mail communications.

For convenience and to expedite handling, those who use Note & Diaries can also access them from specific areas in other screens. For example, if a yellow sticky note exists next to a specific claimant, users, with proper permission, can access Notes & Diaries pertinent only to that specific claimant.

The Notes & Diary function is integrated across all modules of the Beyontec Suite.

For more information, to schedule a demo, or if you have a question, please feel free to email or call us.