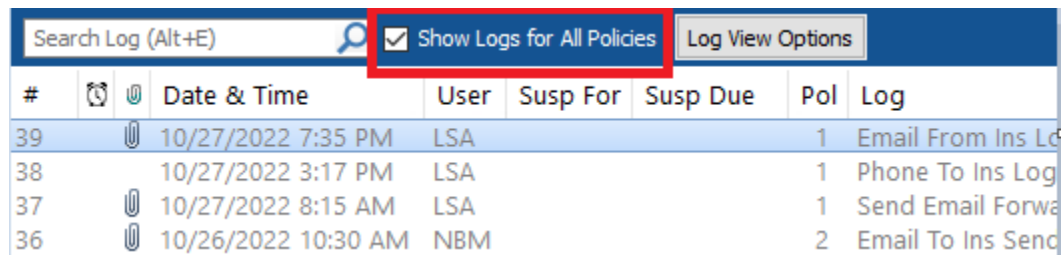


# Log Notes and Suspense Rules

## LOG NOTE RULES

- **Show Logs for All Policies should be check marked** - so you don't miss activity because:
  - it happened on a different policy
  - an activity was logged under a wrong policy
  - your converted activities (from another system) are linked at the client level rather than a policy level



| #  | Date & Time         | User | Susp For | Susp Due | Pol | Log               |
|----|---------------------|------|----------|----------|-----|-------------------|
| 39 | 10/27/2022 7:35 PM  | LSA  |          |          | 1   | Email From Ins Lc |
| 38 | 10/27/2022 3:17 PM  | LSA  |          |          | 1   | Phone To Ins Log  |
| 37 | 10/27/2022 8:15 AM  | LSA  |          |          | 1   | Send Email Forwa  |
| 36 | 10/26/2022 10:30 AM | NBM  |          |          | 2   | Email To Ins Send |

- **Link your Log Notes when they are related!** This keeps the story all together. You don't have to open multiple logs to find out what's happening.
- **Use Log Note Templates whenever possible.**
  - Saves time if you don't have to type the same thing over and over
  - Use the template as a form - then the user just has to "fill it out"
  - Use the template as a checklist - to ensure that employees don't miss steps in a process
- **Use Hot Buttons to cut down on the mouse clicks when you are making an activity.** Be aware that if you use a Hot Button to start an activity, it won't be linked to a previous activity. You'll have to manually link the activity to pull the story together.

## SUSPENSE RULES

- **Don't use Re-Suspend. Instead, select Close Suspend. When that opens, add your notes and select the new suspense date.** This keeps the suspense towards the top of the list and makes it easier to find.
- **Use Suspense Categories.** This helps you to prioritize your day and calls attention to specific situations. Example Categories that need immediate attention:
  - \*\*\*Phone Messages\*\*\*
  - \*\*\* URGENT Follow Up\*\*\*
- **Use Suspense Priority field.** Especially if you are directing suspense items to co-workers. This helps any user understand the urgency/priority of the suspense.
- **Don't ever, ever close a suspense with no new notes!!!**

# Log Note and Suspense “How To’s”

## How to make *Show Log Notes for All Policies* your Default View

1. Click on your name in the upper right corner of HawkSoft
2. Select **User Preferences** and make *Show Logs for All Policies* “Checked”

## How to add items to your Log Note Description drop down menu (aka the Communication menu)

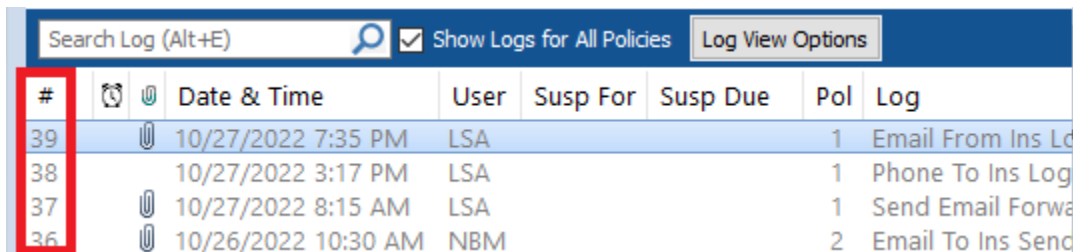
There are multiple Communication Menus based on Line of Business, so make sure you are selecting the correct one. There is also a Client Communication menu.

1. Click the Settings (Cog) icon in the upper right corner of HawkSoft
2. Select Customize Lists
3. Scroll to the Communications menu and click Edit.
4. Use the New button to open the Add/Edit Item dialog box
5. Enter the list item and click OK
6. Click OK to exit the Setup
7. Click Close List Item Setup

[CMS Help Article Link](#)

## How to link Log Notes (two ways)

1. Open an existing Log Note and click the New Log button.
2. If a log note was not linked automatically, link it manually
  - a. Make a note of the original or previous Log Note number
  - b. Open the current Log Note and click the Link to Log button
  - c. Enter the previous Log Note number and click OK



The screenshot shows the HawkSoft Log Note interface. At the top, there is a search bar labeled "Search Log (Alt+E)" with a magnifying glass icon, a checkbox labeled "Show Logs for All Policies" which is checked, and a button labeled "Log View Options". Below this is a table with the following columns: #, Date & Time, User, Susp For, Susp Due, Pol, and Log. The table contains four rows of data. The first row is highlighted in blue. A red box highlights the first column, which contains the Log Note numbers: 39, 38, 37, and 36.

| #  | Date & Time         | User | Susp For | Susp Due | Pol | Log               |
|----|---------------------|------|----------|----------|-----|-------------------|
| 39 | 10/27/2022 7:35 PM  | LSA  |          |          | 1   | Email From Ins Lc |
| 38 | 10/27/2022 3:17 PM  | LSA  |          |          | 1   | Phone To Ins Log  |
| 37 | 10/27/2022 8:15 AM  | LSA  |          |          | 1   | Send Email Forwa  |
| 36 | 10/26/2022 10:30 AM | NBM  |          |          | 2   | Email To Ins Send |

[CMS Help Article Link](#)

## How to add Log Note templates (“The Pencil” icon)

1. Click the Settings (Cog) icon in the upper right corner of HawkSoft
2. Select Customize Lists
3. Scroll to the Suspense/Log templates
4. Click Edit to view the existing list
5. Use the New button to add a new template
6. Enter the Template name in the Description field
7. Enter the text that will appear in the log note when this template is selected and click OK
8. Click OK to save and close the HawkSoft Suspense Items dialog box.
9. Click Close to exist List Items Setup

[CMS Help Article Link](#)

[Click here to download a spreadsheet](#) with ideas of Log Note Templates that other agencies are using.

## How to create a custom Hot Button

In this scenario, the action will contain the following steps: **Action->Phone->From->Ins->Comm**

1. Click the Settings (Cog) icon in the upper right corner of HawkSoft
2. Select General Configuration
3. Select the Action Menu Customize Toolbar side tab
4. Click the New button
5. Enter the following information
  - a. **Button Title (required)** – the name of the button as it appears on the toolbar
  - b. Tool tip (optional) – pop up text that appears when a user hovers over the button
  - c. Help Text (optional) – a brief description of what this button does
  - d. HotKey (optional)– CMS keystrokes that would launch the action – optional
  - e. **Policy Action Type (required)** – Select All Types or a specific line of business. Note: if you select a specific line of business, this button will only work when that line of business is selected on the client screen.
  - f. **Action (required)** - use the button with three dots to launch the action menu, select your action menu items, and then use the Stop button when you’ve reached the point in the menu you wish to end with.
  - g. **Icon (required)** – click the Load icon and select an image for the icon

[CMS Help Article Link](#)

[HUG Webinar on Hot Buttons Link](#)

### **How to add Suspense Categories**

1. Click the Settings (Cog) icon in the upper right corner of HawkSoft
2. Select Customize Lists
3. Scroll to Suspense Categories
4. Click Edit to view the existing list
5. Click the New button to add a new Category
6. Enter the Category name and click OK
7. Click OK to exit Suspense Categories Setup
8. Click Close to exit the List Items Setup