**Claims Training Schedule & SOP**

* Day 1-2
	+ Learn how to organize and save claim/ information in email / S Drive.
	+ Learn what information you will require to file the claim, and if you require additional information, what teams to email for the information. Example, Photos, Invoice, PFS#
	+ Learn what information you need to write on the paper claim form.
	+ Learn to determine what leg freight got damaged on, and which carrier to file with.
* Day 3-4
	+ Learn how interact with carrier and contacts, and how to file claim.
	+ How to follow up with carriers regarding requested additional information such as POD request or photo request, and also with Frontier teams regarding delivery information and details.
* Day 5 – 6
	+ Learn how to make Approval/Denail decisions.
	+ Learn how to format Approval/Denail letters using templates.
	+ After claim has been reviewed by Angel/Kayla, how to close claim based on their decision.
	+ Printing out the final documents for the paper copies, and giving the approvals to accounting
	+ Updating Claim Spreadsheet when carriers send us their claim approval/denial decision.

**NOTES**

* + Value claimed: should be the commercial price / no-mark up / dealer price
	+ Clients have 60 days to file a claim
	+ Documents needed: commercial invoice / pictures / BOL / POD / (carrier’s website, email or Frontier’s team)
	+ Email: Folder Notice (claim notification – team or client)
	+ Print Everything
	+ Path: S Drive / Everyone / Freight Claims / Freight Claim Notes (Customers folders) = Freight Claims Spreadsheet (Must be updated)
	+ Create a new folder for each claim into client’s folders (make sure all documentation and emails are there)
	+ Claims not always happen in the last LEG
	+ Folders email / S Drive and spreadsheet updated
* When Claim is Received
	+ Claim form must be completed along with a commercial invoice
	+ Other documents to include: pictures / BOL / POD / (carrier’s website, email or Frontier’s Team)
	+ Print everything out and paperclip together with claim form in the front
	+ Verify everything on the claim form is filed out right from A1 and commercial invoice
	+ Also verify the claim submitted date (should be the day you received the claim)
* Information to be extracted from A1
	+ PFS / BOL (Tracking #) / Carrier’s name
	+ Delivery date (actual date)
	+ Pieces and weight (lbs)
	+ Check the value claimed comparing it to the commercial invoice and the production information
	+ Base rate + FSC
	+ Frontier’s freight in Trade Payable (applicable LEG). If there is not a value, there hit Rate or add “?”.
	+ Consignee – City, Province
	+ Pay attention to Order Notes

\*\*\*\*Add the claim in the claims spreadsheet\*\*\*\*

* Filing claim with carrier
	+ In the claims inbox make a folder called “PFSXXXXXXX \*Claimed MM/DD/YYYY”
		- * Drag the email as well as any attachments into the folder
	+ Go into S:\everyone\FreightClaims\Carrier Blank Forms and choose the correct carrier freight claim to fill out
	+ Use “Freight Claims Contacts” to determine how the claim will be filed
	+ File the claim, and save all emails sent into S Drive and the email folder as well as any responses

* + - As soon as a claim is filed with the carrier, close out claim
		- Have 2 claims folders open, so no need to switch folders around
			* S:\everyone\FreightClaims\FreightClaimNotes\Closed
			* S:\everyone\FreightClaims\Freight Claim Notes
* Choose to approve or deny claim
	+ Approve for $2.00/lbs – maximum liability or product amount, whichever is lower
	+ Deny
		- Pod signed clear no notice of damage
		- Over 60 days to file claim
		- Concealed damage not reported in 48 hours
		- Insufficient packaging
		- Product claim amount under $50 for LTL or under $15 for parcel

* + \*\*\*\*Special rule for Flatworld\*\*\*
		- We will approve payment of “base rate” freight charges for approved claims. POD and pictures will need to be provided. We will not give a replacement credit, but rather a credit for the freight (base rate only – No FSC)
		- There will be a $15 minimum on small parcel and $50 minimal claim amount for LTL Freight
		- We will use the Product Value + the Base Rate freight amount to determine total claim amounts
		- We will pay based on the lesser of the claim amount or $2/lbs
	+ Create Memo Template for probill – print 1 copy – highlight probill, client, total claimed amount, what we have advised accounting, carrier, and amount paid by carrier
		- On Memo Template write PFS# big with permanent marker on side of template and highlight for filing
	+ Approval:
		- Create Approval for probill – print 2 copies
		- Save Memo and Approval Letter in claim folder
		- Take Frontier Claim form and signed copy of the approval, photocopy 1 copy of each
		- Accounting backup – staple photocopies with signed letter on top
		- Paper flip original signed approval letter on top of accounting backup
		- Hand to AR
	+ Denail:
		- Create Denail for Probill – Print 1 Copy
		- Save Memo and Denail letter in claim folder
		- Take signed Denail letter, POD if applicable, and the Customer Freight Claim Information Sheet – scan copy to your email
		- Email Client denying claim using denial template and scanned copy
		- Save denial email in claim folder ( In S Drive and email)
* Staple our backup together – memo template, Frontier Claim Sheet, all applicable information, approval or denial letter
	+ Update Freight Claim Spreadsheet
	+ Move Claim Folder to Closed in both your email and the S Drive
		- Northbound Plans
* Carrier’s Response
	+ If you have closed a claim prior to carrier’s response, you will need to follow up with carrier until you get a response
	+ Once you receive carrier’s response, find applicable closed folder in S Drive, and save the response
	+ Find paper backup
	+ Update Memo Accordingly, both the electronic and paper copy, save
	+ Update freight claim spreadsheet