

Assignment Entry

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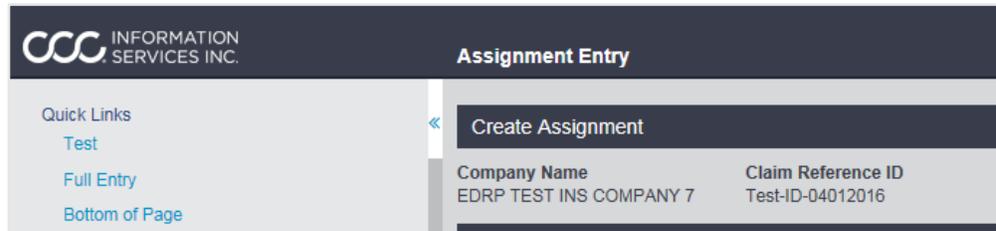
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Assignment Entry, Continued

Introduction Assignment Entry is a feature that allows you to send important claim information electronically to any appraiser. Within Assignment Entry, you can also record and send loss information.

Assignment Entry Users



The following users record information about the loss and send it via the assignment to the appropriate appraiser.

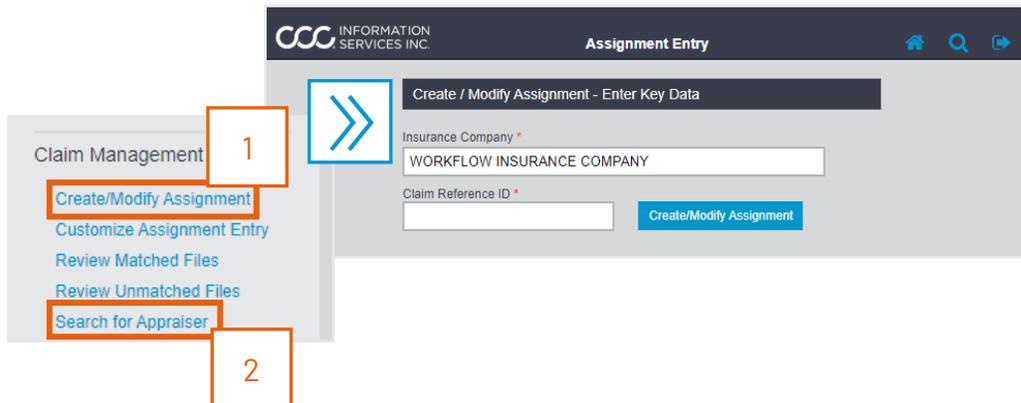
- Loss Takers
- Dispatchers
- Adjusters / Claim Representatives
- Other Insurance Company Employees

Insurance company users create, save, send, modify, reassign, cancel, delete, and print assignments.

How to Create an Assignment

There are two ways to create an Assignment:

1. Using the **Create/Modify Assignment** link.
2. Search and Assign an Appraiser using the **Search for Appraiser** link.

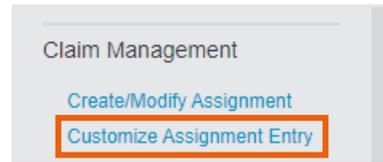


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Assignment Entry, Continued

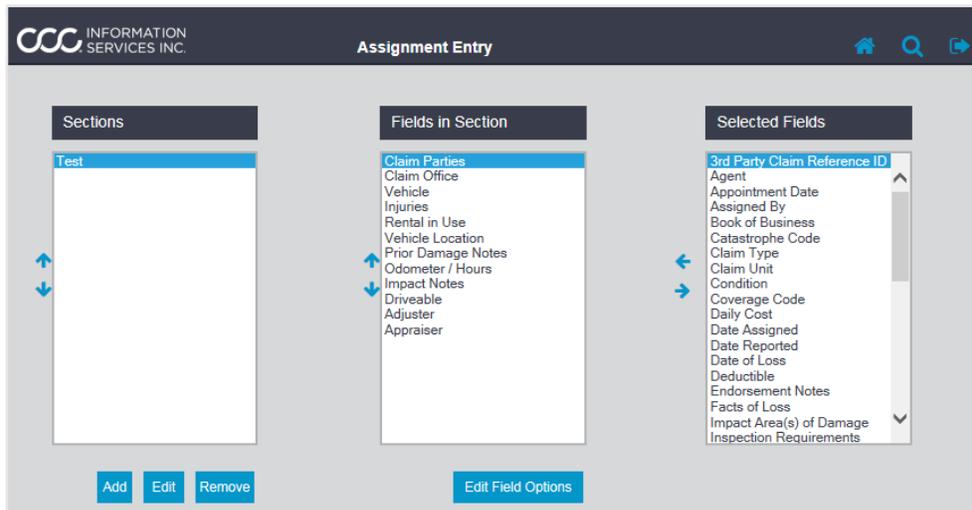
Customized Assignment Entry

Allows the Insurance Company to customize the look of the Assignment Entry screen, including the fields used when creating assignments.



Items that can be customized include:

- Section names
- Fields inside those sections (including the order)
- Fields required for sending an Assignment



If Assignment Entry is customized, then the customized view is the default when a user creates a new assignment. This view shows only those fields your company or claim office use for an assignment.

Note: If the Assignment Entry screen has not been customized, you will see the Full Entry View and all available fields.

Full Entry Screen

To see all the fields in the Assignment, click the **Full Entry** link located on the left side panel.

Note: Only system required fields are indicated by the red asterisk (*) in the Full View.



In both Views, the fields are organized into Sections with a scroll bar so that the assignment can be entered completely from one screen.

Note: If you have entered and saved data on fields NOT included in the Customized Assignment Entry View of the Assignment, that data is saved, but not displayed if you switch back to Customized Assignment Entry.

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Assignment Entry, Continued

Full Assignment Form

The Full Assignment Entry form contains the following sections:

- Loss
- Claim Parties
- Vehicle
- Appraiser
- Policy Agent
- Adjuster
- Claim
- Vehicle Damage
- Policy
- Method of Inspection

Fill in all the required information indicated with a red asterisk (*).

Loss Section

The screenshot shows a web form titled "Loss" with a "back to the top" link in the top right corner. The form contains the following sections and fields:

- Request for Supplement:** A checkbox.
- Claim Office*:** A dropdown menu.
- Type of Loss:** A dropdown menu with "Collision" selected.
- Date of Loss:** Text boxes for day, month, and year, with a calendar icon.
- Time of Loss:** Text boxes for hour and minute, with an "AM" dropdown.
- Date Reported:** Text boxes for day, month, and year, with a calendar icon.
- Loss Reference ID:** A text box containing "05032016_1".
- Catastrophe Code:** A text box.
- Injuries:** Radio buttons for "Yes", "No", and "Unknown".
- Theft:** Radio buttons for "Yes", "No", and "Unknown".
- Facts of Loss:** A large text area with a character count "0 of 4,000 characters used".
- Place of Loss Description:** A text box.
- Address 1:** A text box.
- Address 2:** A text box.
- City:** A text box.
- State / Province:** A dropdown menu.
- Postal Code:** A text box with a hyphen separator.

Step	Action
1	Select the Request for Supplement checkbox if an estimate exists and if the assigned appraiser needs a supplement assignment.
2	Select the appropriate Claim Office using the dropdown arrow.
3	Select the appropriate Type of Loss from the dropdown.
4	Enter the Date of Loss using the text boxes or the calendar icon.
5	Enter the Time of Loss .
6	Change the Date Reported and Loss Reference ID fields, if necessary.
7	Enter a Catastrophe Code , if applicable.
8	Use the radio buttons to indicate if there were Injuries or Theft .
9	Use the text box to enter a brief statement about the Facts of the Loss .
10	Use the text box to enter a description of the loss location in the Place of Loss Description .
11	Use the text boxes to enter the Address, City and Postal Code for the loss.
12	Use the dropdown menu to select the State the Loss took place.

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Assignment Entry, Continued

Adjuster Section

Step	Action
1	Select an Adjuster from the dropdown list
2	Use the text boxes to enter the Last Name
3	Use the text boxes to enter the Phone Number of the adjuster.
4	Enter any available Claim Unit information.

Claims Parties Section

Use the **Add Claim Party** link to enter Claim Party information.

Step	Action								
1	Enter available Claim Party information using the text boxes, radio buttons and dropdown lists. Note: Claim Party Type, Individual/Company and Last Name / Company Name are mandatory fields to send an assignment.								
2	To add a Claim Party Telephone Number, click the Add Claim Party Phone link. <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> </div> <table border="1" style="margin: 10px 0;"> <thead> <tr> <th>Step</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Use the text boxes to enter the phone Number.</td> </tr> <tr> <td>2</td> <td>Use the dropdown arrow to select the Type.</td> </tr> <tr> <td>3</td> <td>Click the Add Phone Number button.</td> </tr> </tbody> </table>	Step	Action	1	Use the text boxes to enter the phone Number .	2	Use the dropdown arrow to select the Type .	3	Click the Add Phone Number button.
Step	Action								
1	Use the text boxes to enter the phone Number .								
2	Use the dropdown arrow to select the Type .								
3	Click the Add Phone Number button.								
3	Click the Add Party button when all Claim Party information is entered.								

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Assignment Entry, Continued

Claim Section

Step	Action
1	Use the dropdown lists to select a Claim Type and Structural Type , if applicable.
2	Use the radio buttons to indicate if a rental car is in use from the Rental in Use section. Note: If you selected Yes, use the text box to enter the Daily Cost and the radio buttons to indicate if it is OK to Pay .
3	Use the text box to enter the 3rd Party Claim Reference ID , if appropriate.

Vehicle Section

Enter the **Vehicle Identification Number (VIN)** if it is available.

Click the **VIN Decode** button. If the corresponding information for the VIN is available, the vehicle data populates the **Vehicle Type**, **Year**, **Make** and **Model** fields (see next page).

Note: The VIN must be an exact match for this to work.

Continued on next page

Assignment Entry, Continued

Vehicle Section, continued

To enter the Vehicle Information manually, follow these steps:

Step	Action
1	Select a Vehicle Type from the dropdown list. The page refreshes so that the dropdown list for the next field populates. Note: If you selected Motorcycle as the Claim Type, then Motorcycle is the only option in the dropdown menu.
2	Select the model Year of the vehicle.
3	Select a Make (Manufacturer) for the vehicle.
4	Select a Model for the vehicle.

You can also include additional information about the Vehicle. Use the text boxes and dropdown lists to enter the vehicle information.

The screenshot shows a form for entering vehicle information. The fields are arranged in two columns. Callouts provide specific instructions for several fields:

- 1: Example: "Two-Door" or "Station"**: Points to the **Body Style** dropdown menu.
- 2: Example: "6-cylinder" or "Diesel"**: Points to the **Vehicle Engine** dropdown menu.
- 3: If more than one color, enter the predominant color for each**: Points to the **Vehicle Interior Color** and **Vehicle Exterior Color** text boxes.
- 4: Omit tenths when entering Odometer**: Points to the **Odometer / Hours** text box.

Other fields in the form include: **Vehicle Production Date** (date), **License Plate / Registration #** (text), **State of Registration** (dropdown), **License Plate / Registration # Expiration Date** (date with calendar icon), **Vehicle Location** (dropdown), **Name** (text), **Address 1** and **Address 2** (text), **City** (text), **State / Province** (dropdown), **Postal Code** (text), and **Phone Number** (text with hyphens and 'Ex' field).

Continued on next page

Assignment Entry, Continued

Vehicle Damage Section

Step	Action
1	Use the dropdown lists to select the Primary, Secondary, and Tertiary.
2	Use the radio buttons to select a vehicle operational status: Drivable, Airbags Deployed, and Intend to Repair. Note: Select Unknown if this information is not available.
2	Use the dropdown to select a Severity.
4	Use the text fields to enter Prior Damage Notes and Impact Notes.
5	Use the radio buttons to indicate if the vehicle is a Total Loss. Note: Select Unknown if this information is not available.
6	Use the dropdown list to select a vehicle Condition.
7	Enter the five to nine-digit Postal Code Where Vehicle Principally Garaged, if you selected Yes for Total Loss.
8	Click Select JPG to upload a vehicle image. Note: Follow the image criteria on the right.

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Assignment Entry, Continued

Appraiser Section

Appraiser
[back to the top](#)

Get MOI Recommendations

Appraiser Type*

Appraiser Name*

Address
 Phone

Assigned By

Instructions to Estimator

0 of 4,000 characters used

Inspection Requirements

0 of 64 characters used

Date Assigned
 / /

Appointment Date
 / /

Appointment Time
 :

Step	Action
1	Use the dropdown list to select an Appraiser Type . Based on the selected type, the Appraiser Name drop down list populates.
2	Select an Appraiser Name from the dropdown list or use the <i>search for appraiser</i> link to select an appraiser. The address and phone information populate.
3	Use the text box to enter Assigned By information.
4	Use the text boxes to enter Instructions to Estimator and / or Inspection Requirements .
5	Use the text boxes or calendar icons to enter Date Assigned and / or Appointment Date .
6	Use the text boxes to enter an Appointment Time .

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Assignment Entry, Continued

Policy Section (Optional)

The screenshot shows a 'Policy' form with the following fields and controls:

- Insurance Carrier:** A dropdown menu currently showing 'EDRP TEST INS COMPANY 7'.
- Enter Other:** A text input field.
- Subsidiary Insurance Carrier:** A dropdown menu.
- Coverage Code:** A text input field.
- Deductible:** A text input field.
- Deductible Type:** A dropdown menu currently showing 'Dollar Amount'.
- Policy Type:** A dropdown menu.
- Policy Number:** A text input field.
- Policy Extension:** A text input field.
- Policy Effective Date:** A date input field with a calendar icon.
- Policy Expiration Date:** A date input field with a calendar icon.
- Book of Business:** A dropdown menu.
- NAIC Line of Business:** A dropdown menu.
- Underwriting Company:** A text input field.
- Policy Notes:** A large text area with a character count of '0 of 4,000 characters used'.
- Endorsement Notes:** A large text area with a character count of '0 of 4,000 characters used'.

Step	Action
1	Use the dropdown list to select an Insurance Carrier . Select Other if the carrier does not appear on the list. Note: If you select Other, enter the name of the insurance company in the Enter Other field.
2	Select a Subsidiary Insurance Carrier from the dropdown if one exists.
3	Enter a Coverage Code in the text box.
3	Enter a Deductible Amount and select a Deductible Type from the dropdown list.
4	Select a Policy Type from the dropdown, then use the text boxes to enter the Policy Number and Policy Extension .
5	Use the text boxes or calendar icons to enter the Policy Effective and Expiration Dates .
6	Use the dropdown lists to select the Book of Business and / or the NAIC Line of Business .
7	Use the text boxes to enter the Underwriting Company , Policy and Endorsement Notes .

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Assignment Entry, Continued

Policy Agent Section

Policy Agent

Last Name <input style="width: 95%;" type="text"/>	First Name <input style="width: 95%;" type="text"/>
ID <input style="width: 95%;" type="text"/>	License <input style="width: 95%;" type="text"/>
Agent Type <input style="width: 95%;" type="text" value="v"/>	Phone Number <input style="width: 20%;" type="text"/> - <input style="width: 20%;" type="text"/> - <input style="width: 20%;" type="text"/> Ex <input style="width: 20%;" type="text"/>
Address 1 <input style="width: 95%;" type="text"/>	Address 2 <input style="width: 95%;" type="text"/>
City <input style="width: 95%;" type="text"/>	State / Province <input style="width: 95%;" type="text" value="v"/>
Postal Code <input style="width: 40%;" type="text"/> - <input style="width: 40%;" type="text"/>	

Step	Action
1	Use the text boxes to enter the agent's Last Name , First Name , Agent ID , and License .
2	Use the dropdown arrow to select the Agent Type .
3	Use the text boxes to enter the Phone Number .
4	Use the text boxes to enter the Address and City .
5	Use the dropdown arrow to select the State or Province .
6	Use the text boxes to enter the Postal Code .

Method of Inspection Section

Method of Inspection back to the top

Inspection Location <input style="width: 95%;" type="text" value="v"/>
Inspection Type <input style="width: 95%;" type="text" value="v"/>

Step	Action
1	Select an Inspection Location from the dropdown.
2	Select an Inspection Type from the dropdown.

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Assignment Entry, Continued

Sending an Assignment

To send the assignment to the designated Appraiser, click the **Send** button at the bottom the of the Assignment Entry screen.



You will be asked to confirm the send assignment.

Note: If you forgot any required information, an error message appears when you attempt to send the Assignment. The message tells you what field is missing and move the screen and cursor to that field.



Note: The **Book Appointment** button will direct you to the appointment booking page to search and book an appointment. The **Proceed To Booking** button will direct you to the Appraiser Search and Scheduling page. Click the **Save** button before proceeding to these pages.

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Assignment Entry, Continued

Claim Folder Management

Enables you to view estimates, images and other related claim documents and create and send claim notes. Claim folders are created automatically when an assignment is created.

The Claim Folder consists of 6 pages: Summary, Documents, Images, Notes, Reminders, and History. Each Page has an Overview Pane that displays Actions you can take, a snapshot of the Data in the Claim Folder, and the Contacts for this claim. The Claim Folder can include the following:

- Assignment
- Estimate/Supplement Report
- Digital Images
- Audit Report
- NICB Report
- Unrelated Prior Damage Report
- Claim Summary Report
- Reinspection Report
- Event Log
- Claim Folder Notes
- Other documents

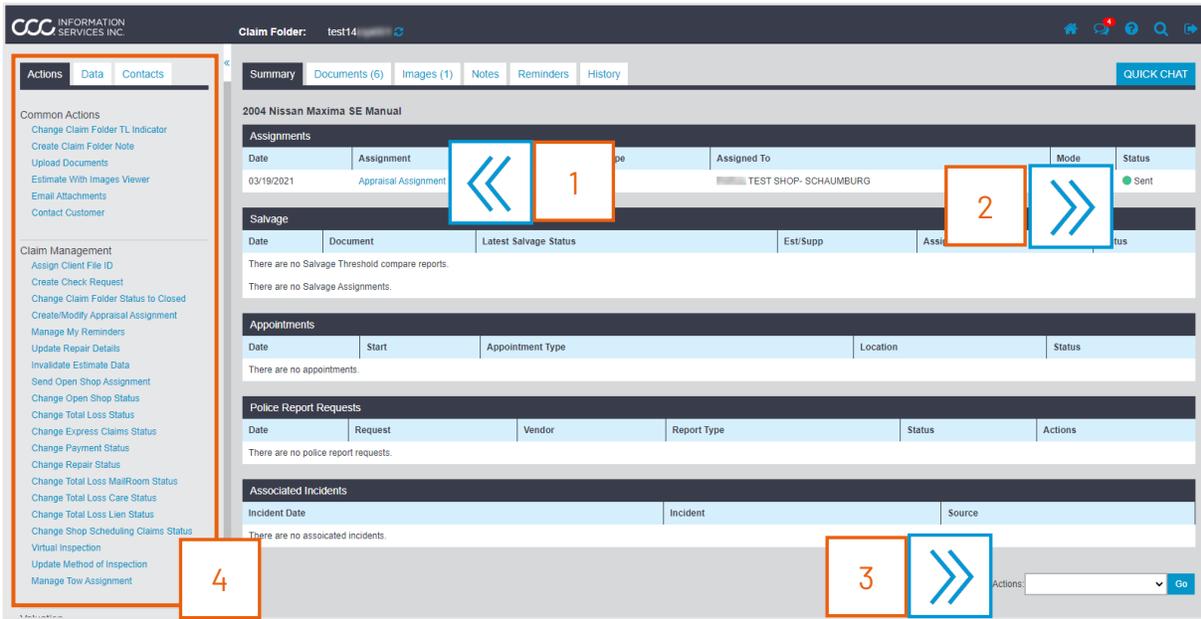
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Assignment Entry, Continued

Summary Page

The Summary Page displays the most recent information added to the Claim Folder. Available information is based on user access rights.



Part	Description
1	Click on links to open Claim Folder Documents.
2	Displays the Status of a Document in the auto claims process.
3	The Action Menu contains the print options and claim folder actions available to you on a particular Page.
4	Overview Plan displays available action, data and contacts for this claim.

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Assignment Entry, Continued

Document Page The Documents Page contains all of the documents that have been uploaded to this Claim Folder.

<input type="checkbox"/>	Date	Document	Amount	Est/Supp	Submitted By	Status
<input type="checkbox"/>	03/19/2021 1:10 PM CST	Supplement 01	\$818.05	S01	TEST SHOP- SCHAUMBURG	Submitted
<input type="checkbox"/>	03/19/2021 1:10 PM CST	Audit Report	617	S01		Submitted
<input type="checkbox"/>	03/19/2021 12:45 PM CST	NICB			TEST SHOP- SCHAUMBURG	Submitted
<input type="checkbox"/>	03/19/2021 12:45 PM CST	Estimate 01	\$376.07	E01	TEST SHOP- SCHAUMBURG	Submitted
<input type="checkbox"/>	03/19/2021 12:45 PM CST	Audit Report	617	E01		Submitted
<input type="checkbox"/>	03/19/2021 11:17 AM CST	Appraisal Assignment				Sent

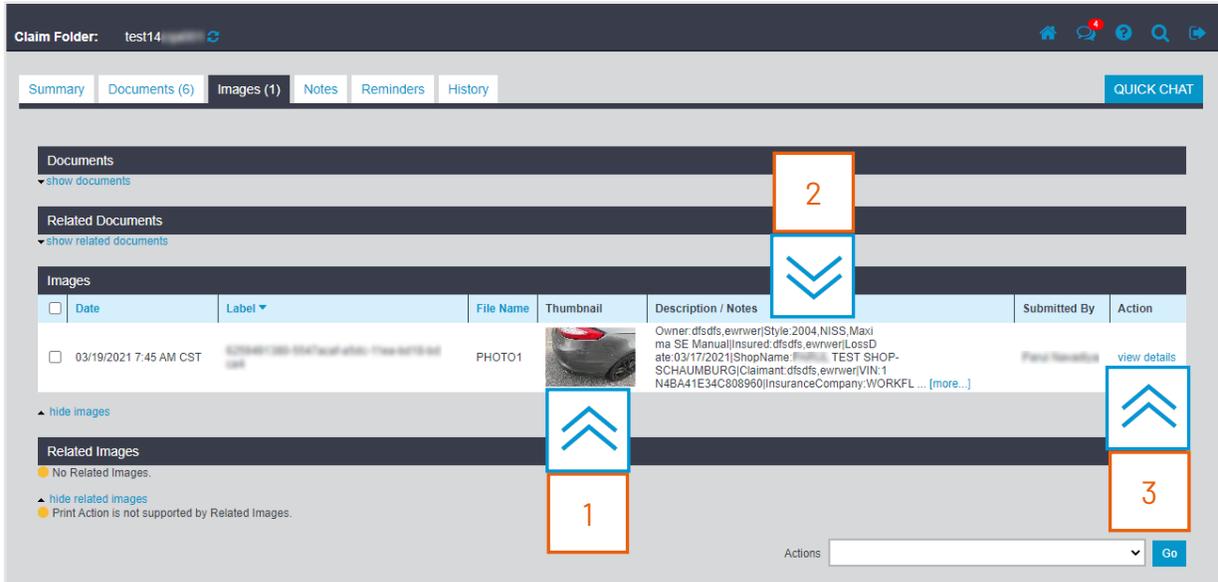
Part	Description
1	Click on each link to open the documents in Adobe Acrobat.

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Assignment Entry, Continued

Images Page The Images Page contains all the digital images uploaded to the Claim Folder.

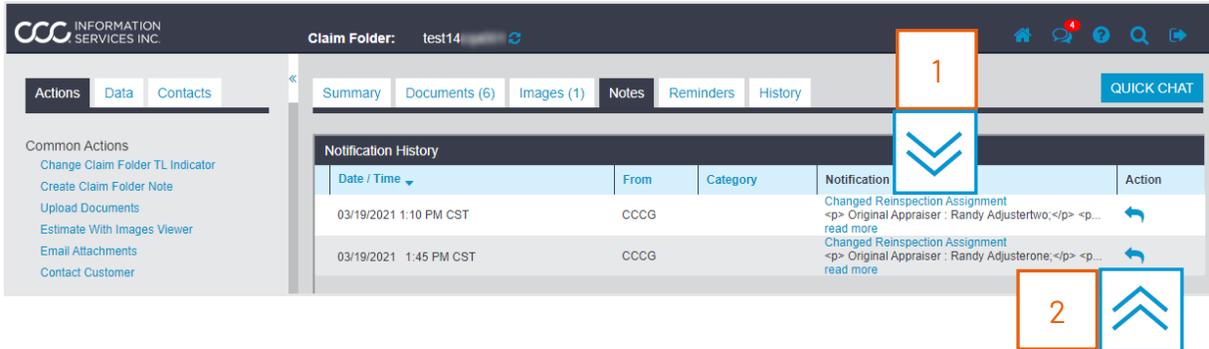


Part	Description
1	Click on thumbnail for full View of image Tools.
2	Allows users to view notes attached to image by estimator.
3	Click view detail to see all information about the image.

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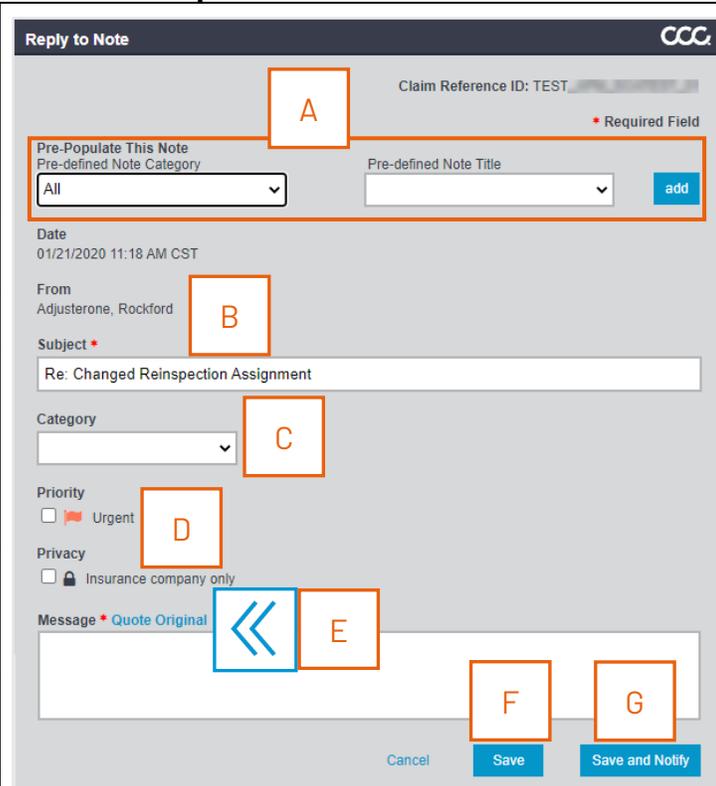
Assignment Entry, Continued

Notes Page The Notes Page contains a history of claim folder notes.



Part	Description
1	Click the link to view the note.
2	Click the Reply icon in the Actions column to reply to the note.

Part	Description
A	Select option from dropdowns, then click add to populate message field with the pre-defined message.
B	Enter a Subject in the field.
C	Select a note Category .
D	Use the checkboxes to select if the note is a Priority or Privacy (for the insurance company only).
E	Click Quote Original to add the original quote to the message field.
F	Click Save to save the note to the Notes tab.
G	Click Save and Notify to save the note to the Notes tab and notify the appropriate parties.

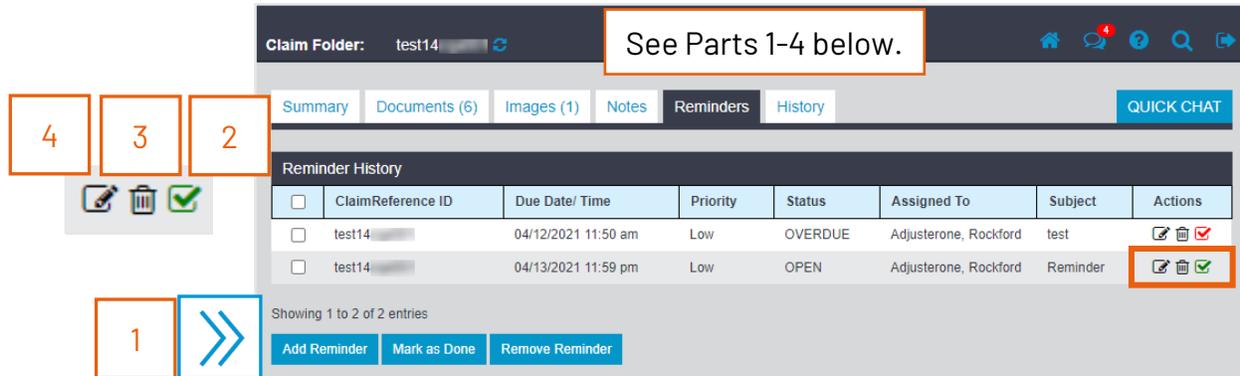


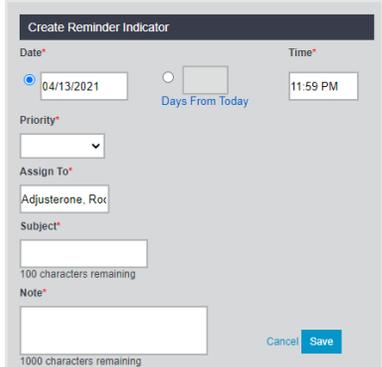
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Assignment Entry, Continued

Reminders Page The Reminders Page contains a list of claim folder reminders.



Part	Description														
1	<p>Add a Reminder</p> <table border="1"> <thead> <tr> <th>Step</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Click Add Reminder.</td> </tr> <tr> <td>2</td> <td>Select a Date radio button and enter a date for the reminder or the days from the current day for the reminder to occur.</td> </tr> <tr> <td>3</td> <td>Select a Priority from the dropdown.</td> </tr> </tbody> </table>  <table border="1"> <tbody> <tr> <td>4</td> <td>Enter the individual who is assigned to the reminder in the Assign To field.</td> </tr> <tr> <td>5</td> <td>Enter a reminder Subject in the field.</td> </tr> <tr> <td>6</td> <td>Enter the reminder Note in the field, then click Save.</td> </tr> </tbody> </table>	Step	Action	1	Click Add Reminder .	2	Select a Date radio button and enter a date for the reminder or the days from the current day for the reminder to occur.	3	Select a Priority from the dropdown.	4	Enter the individual who is assigned to the reminder in the Assign To field.	5	Enter a reminder Subject in the field.	6	Enter the reminder Note in the field, then click Save .
Step	Action														
1	Click Add Reminder .														
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3	Select a Priority from the dropdown.														
4	Enter the individual who is assigned to the reminder in the Assign To field.														
5	Enter a reminder Subject in the field.														
6	Enter the reminder Note in the field, then click Save .														
2	<p>Mark a Reminder as Done  Status: Open  Status: Overdue</p> <table border="1"> <thead> <tr> <th>Step</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Select the Mark as Done icon in the Actions column.</td> </tr> <tr> <td>2</td> <td>Then click Yes to confirm.</td> </tr> </tbody> </table>	Step	Action	1	Select the Mark as Done icon in the Actions column.	2	Then click Yes to confirm.								
Step	Action														
1	Select the Mark as Done icon in the Actions column.														
2	Then click Yes to confirm.														
3	<p>Remove a Reminder</p> <table border="1"> <thead> <tr> <th>Step</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Select the Delete icon in the Actions column. </td> </tr> <tr> <td>2</td> <td>Then click Yes to confirm.</td> </tr> </tbody> </table>	Step	Action	1	Select the Delete icon in the Actions column. 	2	Then click Yes to confirm.								
Step	Action														
1	Select the Delete icon in the Actions column. 														
2	Then click Yes to confirm.														
4	<p>Edit a Reminder</p> <table border="1"> <thead> <tr> <th>Step</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Select the Edit icon in the Actions column. </td> </tr> <tr> <td>2</td> <td>The Edit Reminder Indicator opens, make desired changes.</td> </tr> <tr> <td>3</td> <td>Click Save when complete.</td> </tr> </tbody> </table>	Step	Action	1	Select the Edit icon in the Actions column. 	2	The Edit Reminder Indicator opens, make desired changes.	3	Click Save when complete.						
Step	Action														
1	Select the Edit icon in the Actions column. 														
2	The Edit Reminder Indicator opens, make desired changes.														
3	Click Save when complete.														

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Assignment Entry, Continued

History Page The History Page contains all business events that have occurred to the Claim Folder from Assignment until the moment of viewing the History Page. **Note:** Click links in Event/ Notes to view additional information when available.

The screenshot shows the 'History' tab of a claim folder. The 'History Items' table is as follows:

Date/Time	From	Category	Event / Note
03/19/2021 1:10 PM CST	system	Estimate/Supplement	Predictive Review completed. CREATED BY: PEPEV. Recommendation: Very Low
03/19/2021 1:10 PM CST	system	Audit	Audit report added. CREATED BY: QAAR
03/19/2021 1:10 PM CST	Adjusterone, Rockford	Other	Claim Note Test This claim note is a VIN does not match CREATED BY: FR
03/19/2021 1:10 PM CST	system	Estimate/Supplement	Estimate/Supplement report added to the Claim Folder. CREATED BY: PWAPM. Supplement 01
03/19/2021 1:10 PM CST	system	Estimate/Supplement	Estimate Sent to Mailbox. CREATED BY: PWAPM. Estimate Written by Repair Facility: TEST SHOP- SCHAUMBURG
03/19/2021 1:10 PM CST	Adjusterone, Rockford	Payment	Payment Processed - Estimate Amount Paid Your payment has been processed, based on the estimate amount received.
03/19/2021 1:09 PM CST	system	Audit	Audit on estimate requested CREATED BY: CFCS. Created by: TEST SHOP- SCHAUMBURG User Log-in: Unknown
03/19/2021 1:09 PM CST	system	Estimate/Supplement	Preliminary Supp. created CREATED BY: CFCS. Created by: TEST SHOP- SCHAUMBURG User Log-in: Unknown Preliminary Supplement 1 Created.
03/19/2021 12:46 PM CST	system	Estimate/Supplement	Predictive Review completed. CREATED BY: PEPEV. Recommendation: Very Low
03/19/2021 12:45 PM CST	system	Images	Digital image(s) added to this claim folder. CREATED BY: PWAPM. Label: FileName: PHOTO1
03/19/2021 12:45 PM CST	system	Audit	Audit report added to the Claim Folder. CREATED BY: QAAR. Audit Report

Part	Description
1	Use to refresh the Events/ Notes.
2	Identifies type of Business Event.
3	Identifies what occurred in Claim Folder and by whom.
4	View Note Link.

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Assignment Entry, Continued

Version History

Version Number	Revision Date	Description
1.0	8/31/2021	Version History Added

