Assignment Entry

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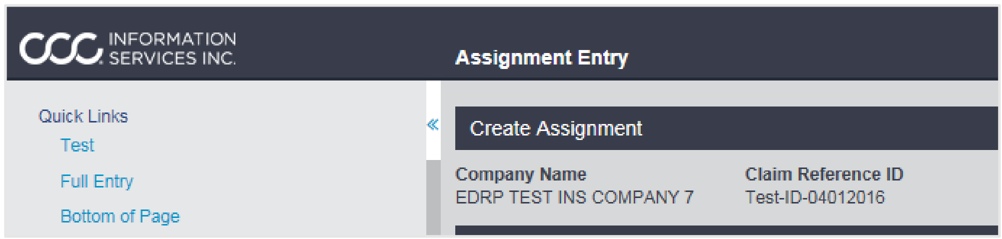
Introduction

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.

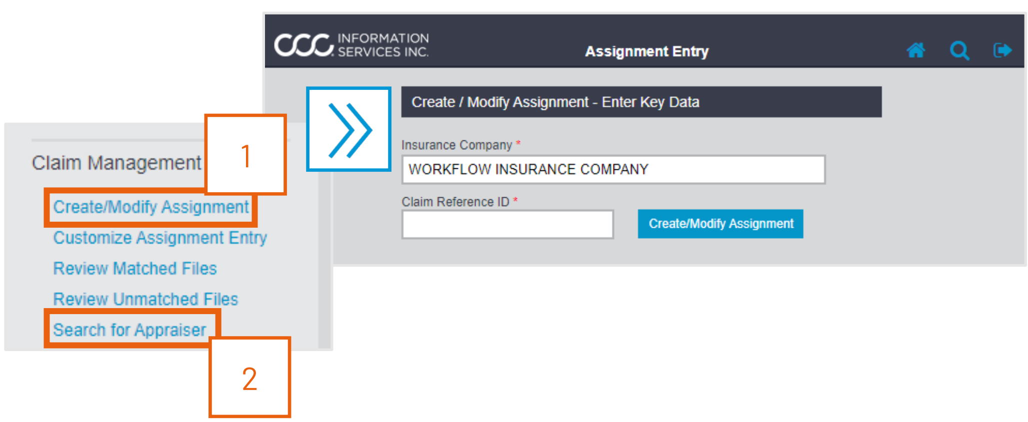
- Loss Takers
- Dispatchers
- Adjusters / Claim Representatives
- Other Insurance Company Employees

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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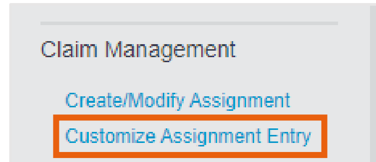
Assignment Entry, Continued

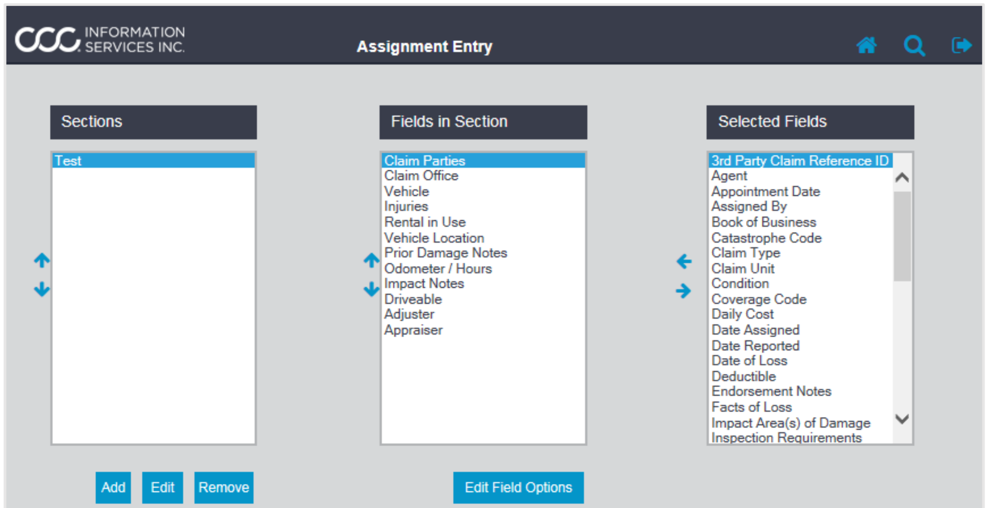
Customized Assignment Entry

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

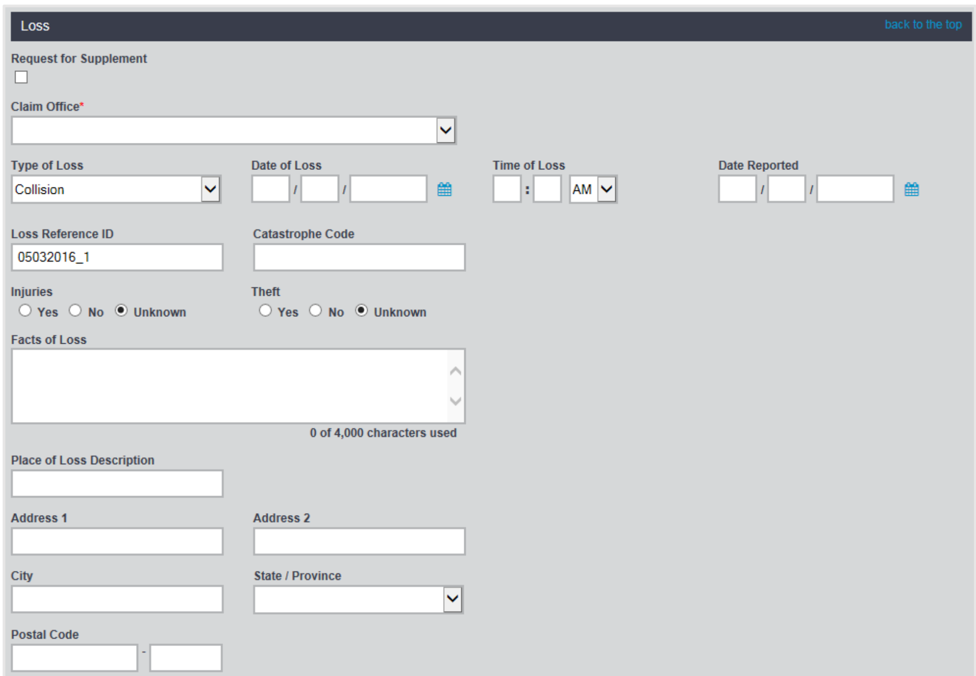
Full Assignment Form

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



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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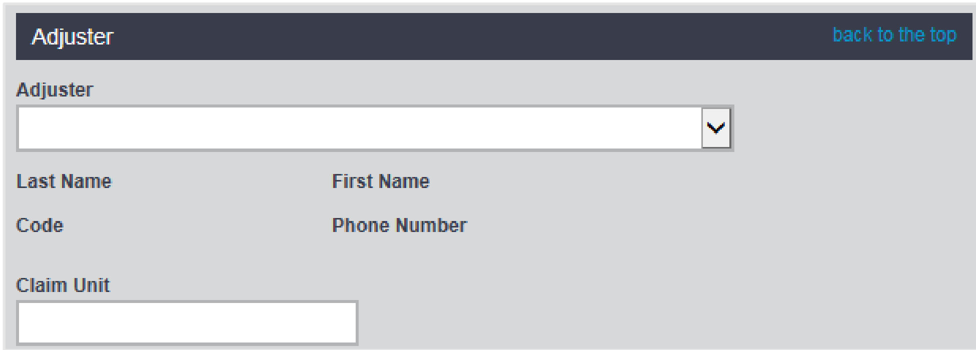
Adjuster Section



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.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>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.</td></tr>
<tr><td>2</td><td>To add a Claim Party Telephone Number, click the Add Claim Party Phone link.


<table>
<tr><th>Step</th><th>Action</th></tr>
<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>
</table></td></tr>
<tr><td>3</td><td>Click the Add Party button when all Claim Party information is entered.</td></tr>
</table>

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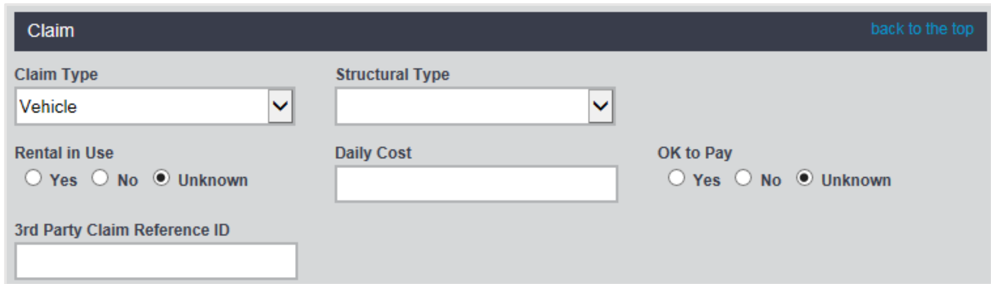
Assignment Entry, Continued

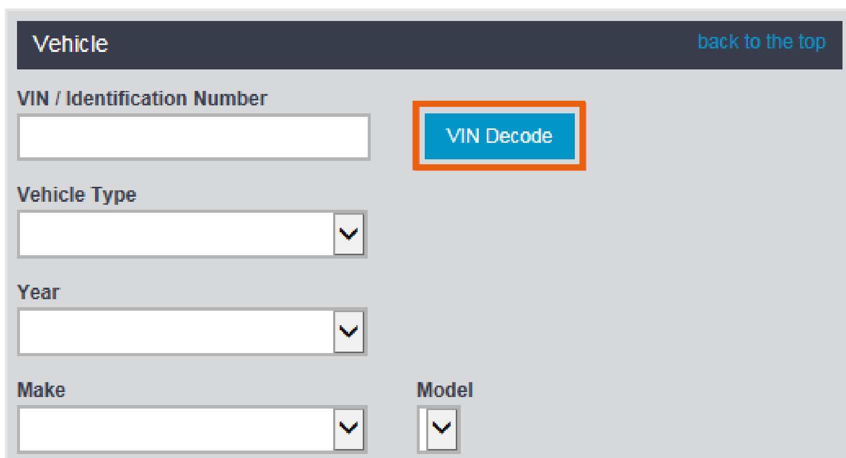
Claim Section



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.

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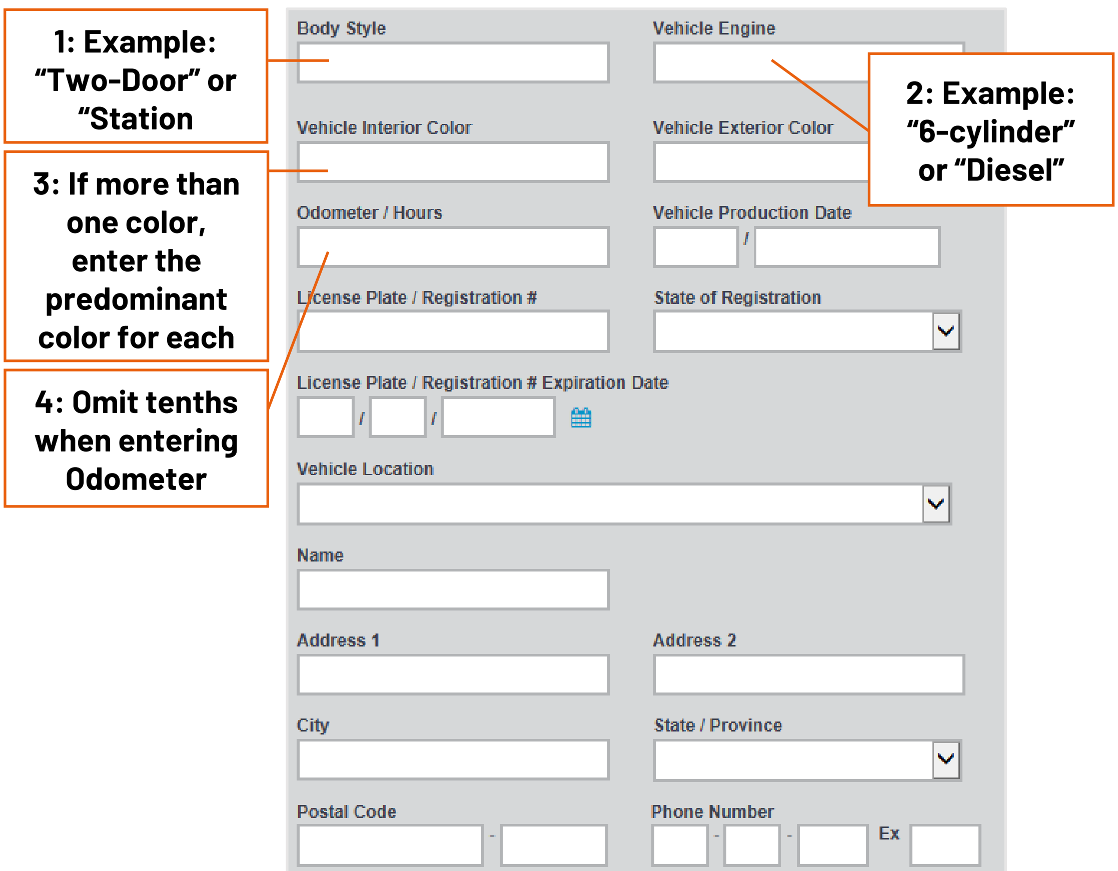
Assignment Entry, Continued

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.



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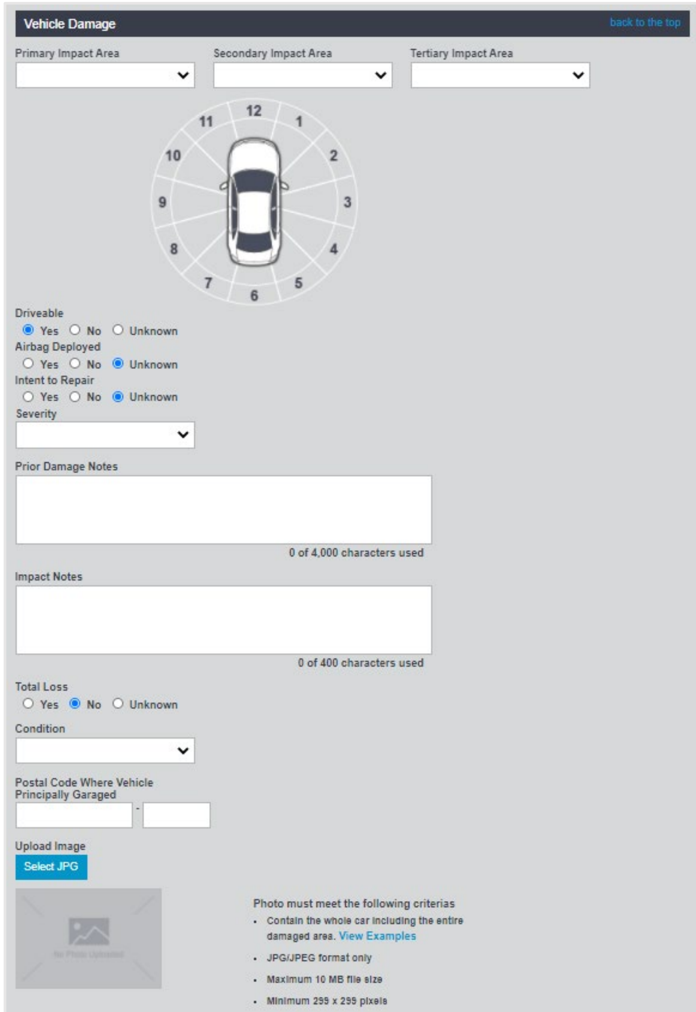
Assignment Entry, Continued

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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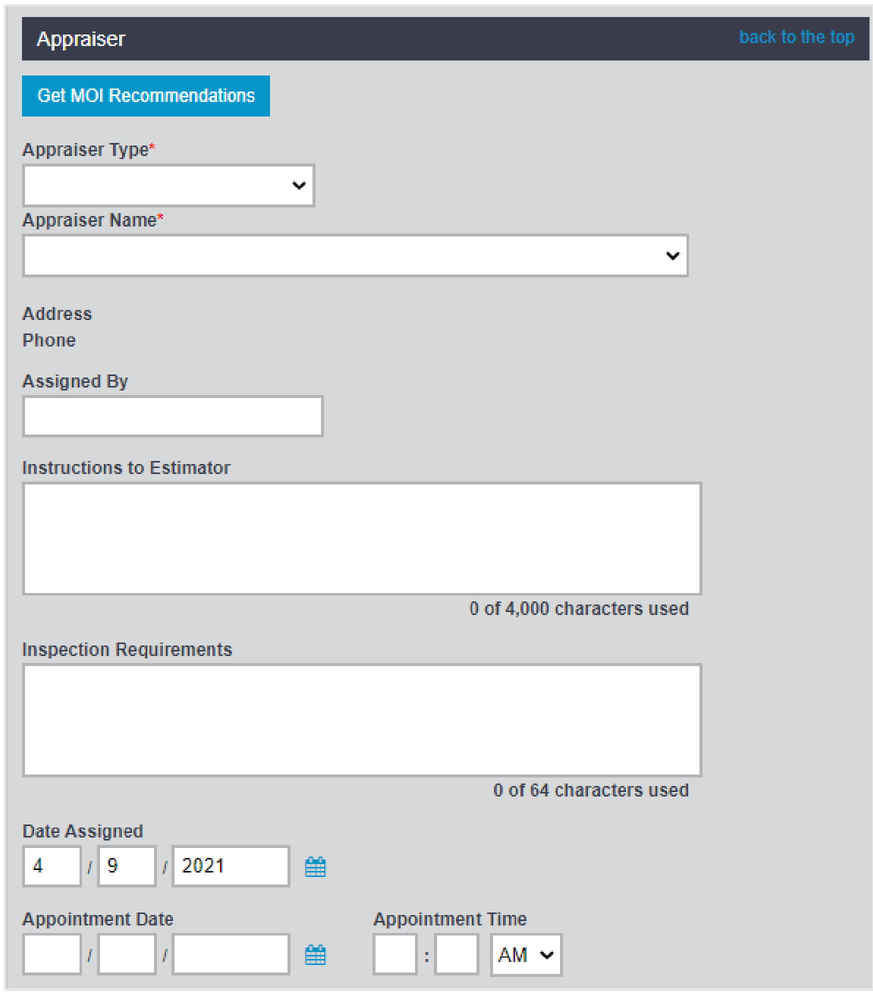
Assignment Entry, Continued

Appraiser Section



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 *search for appraiser* 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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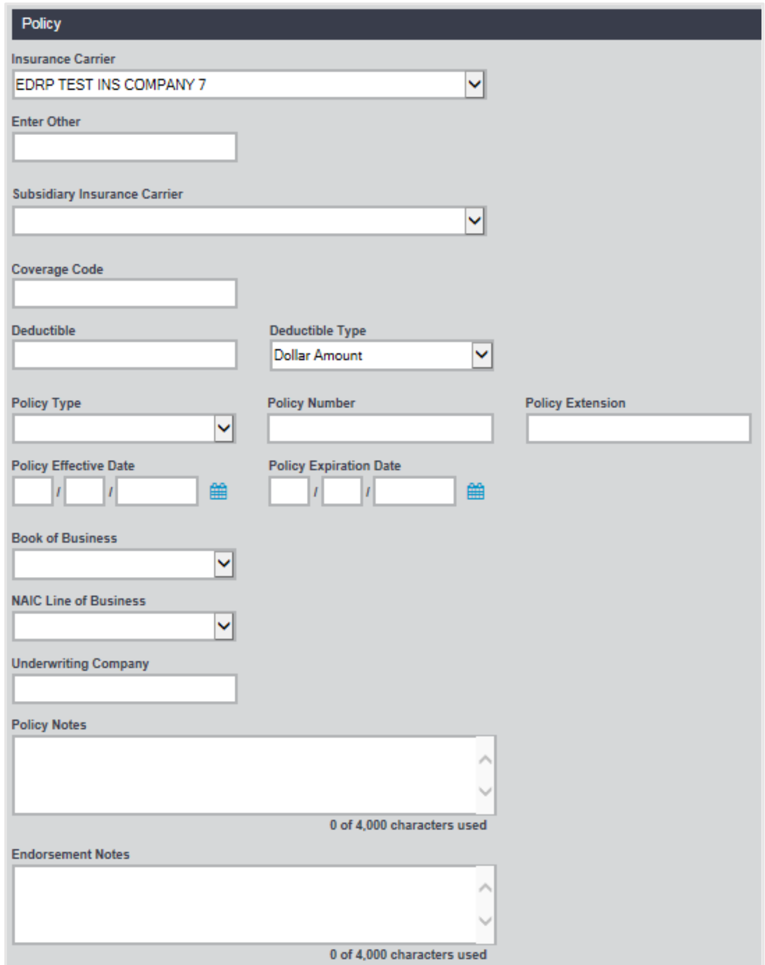
Assignment Entry, Continued

Policy Section
(Optional)



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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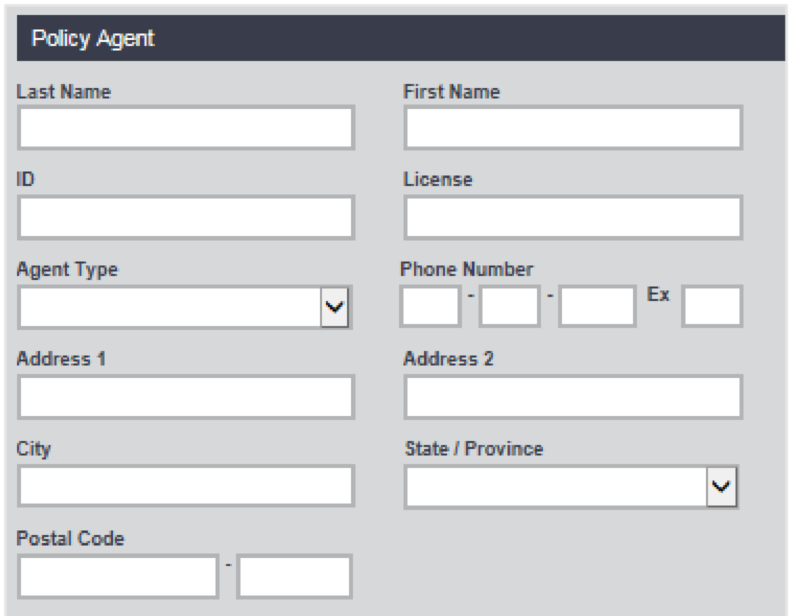
Assignment Entry, Continued

Policy Agent Section



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

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

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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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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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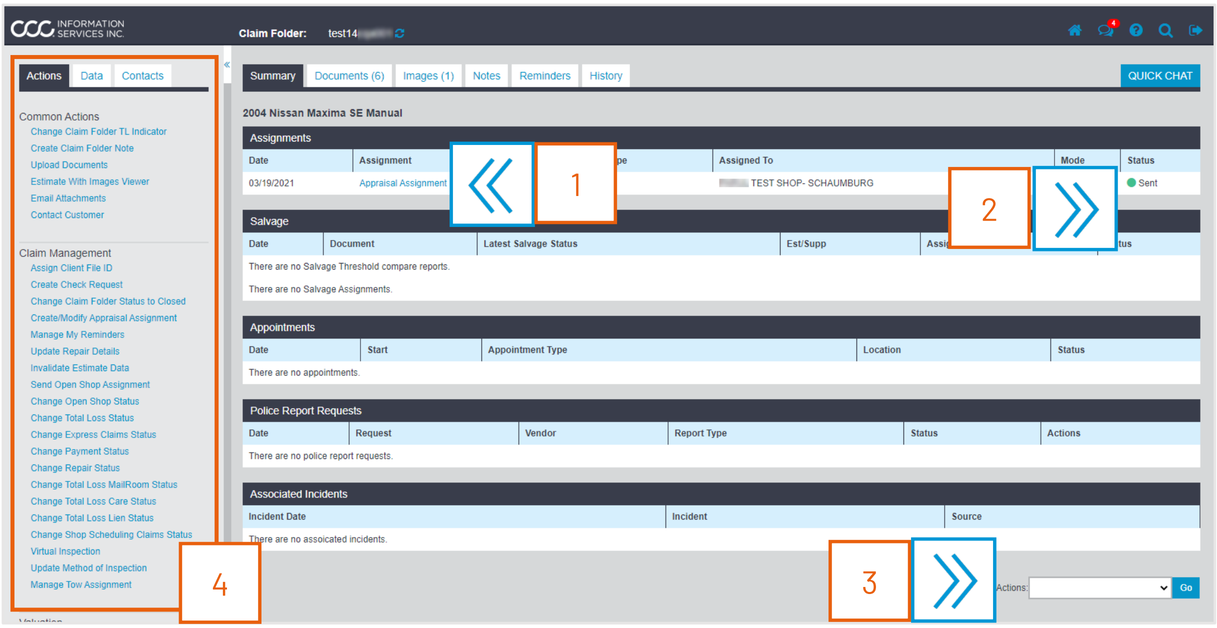
Assignment Entry, Continued

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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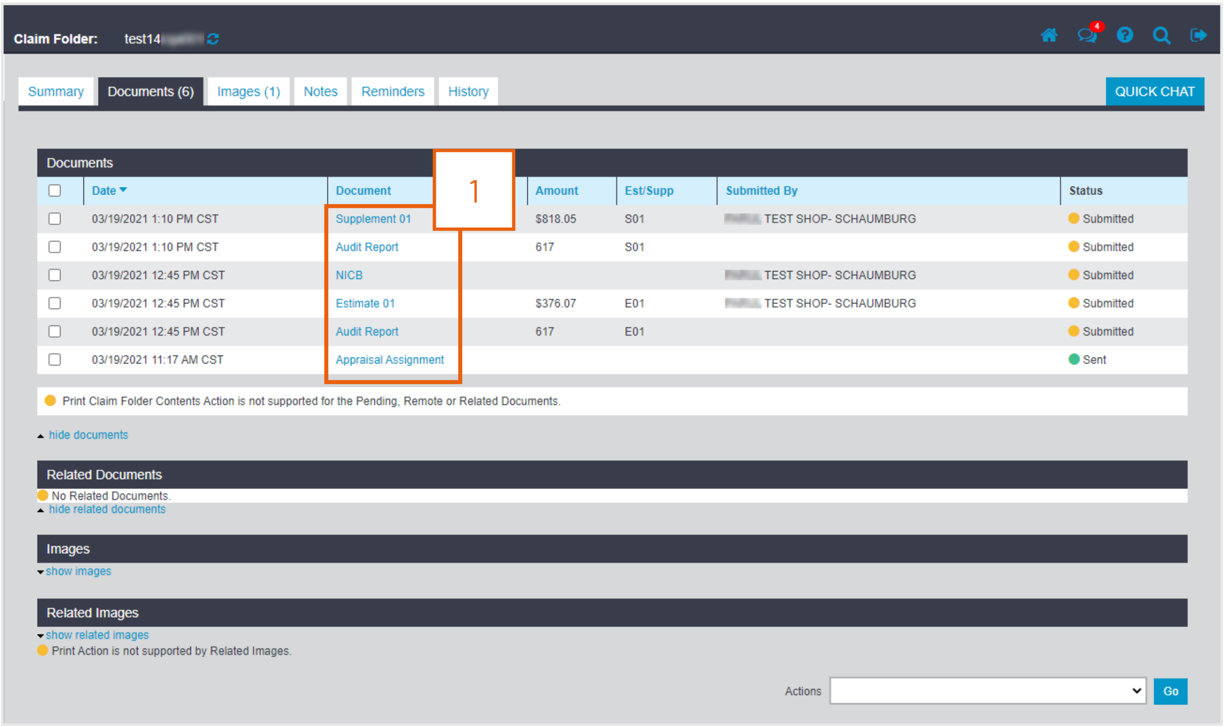
Assignment Entry, Continued

Document Page

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



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

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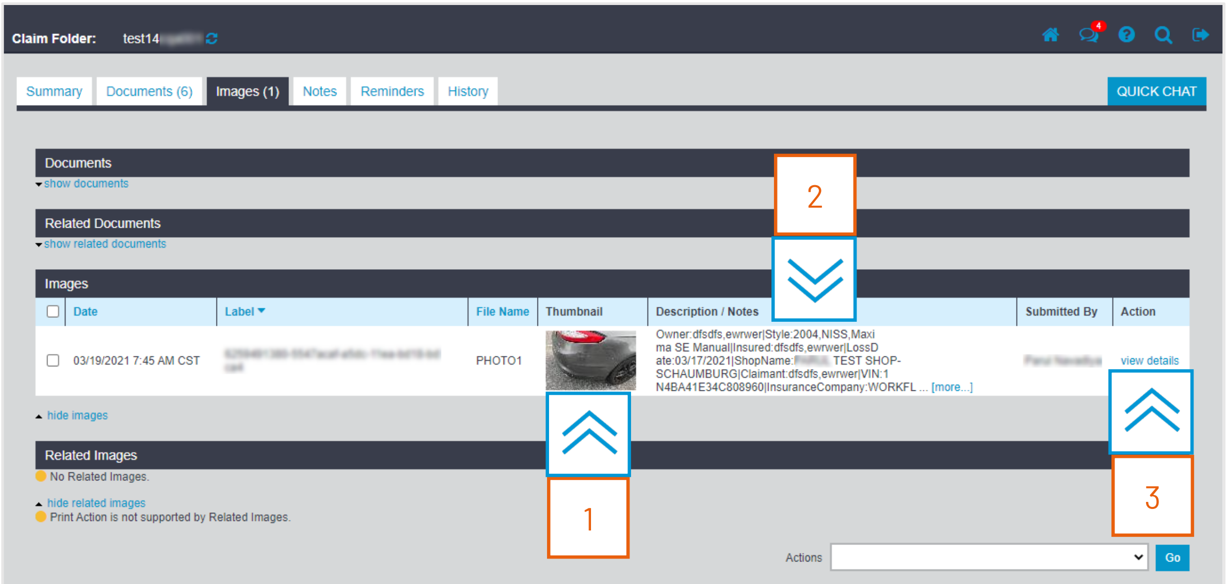
Images Page The Images Page contains all the digital images uploaded to the Claim Folder.



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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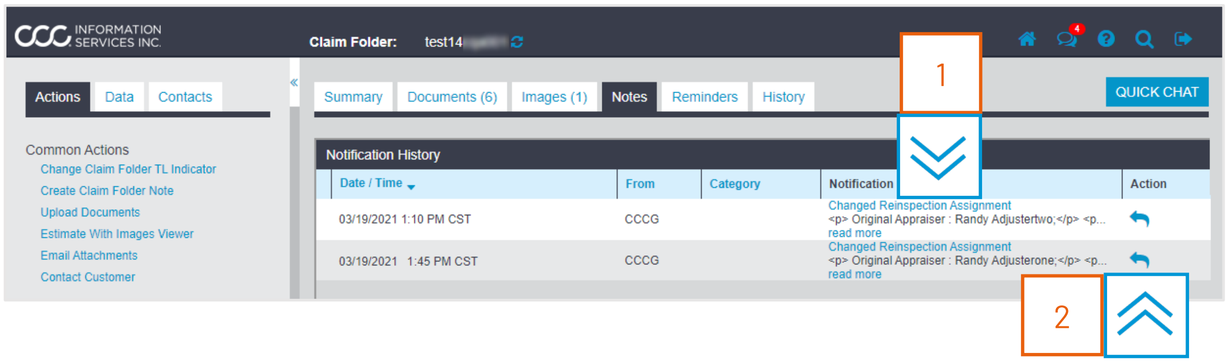
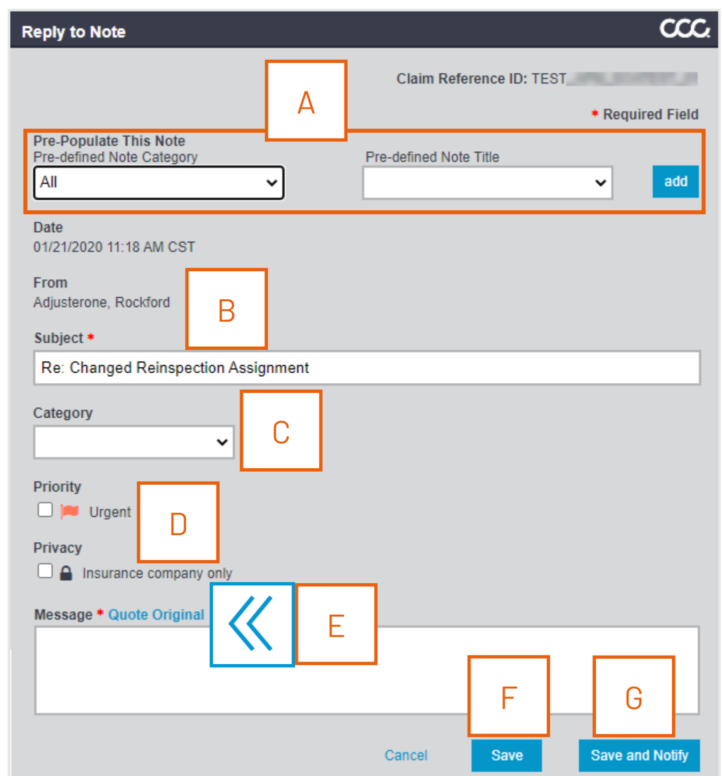
Notes Page

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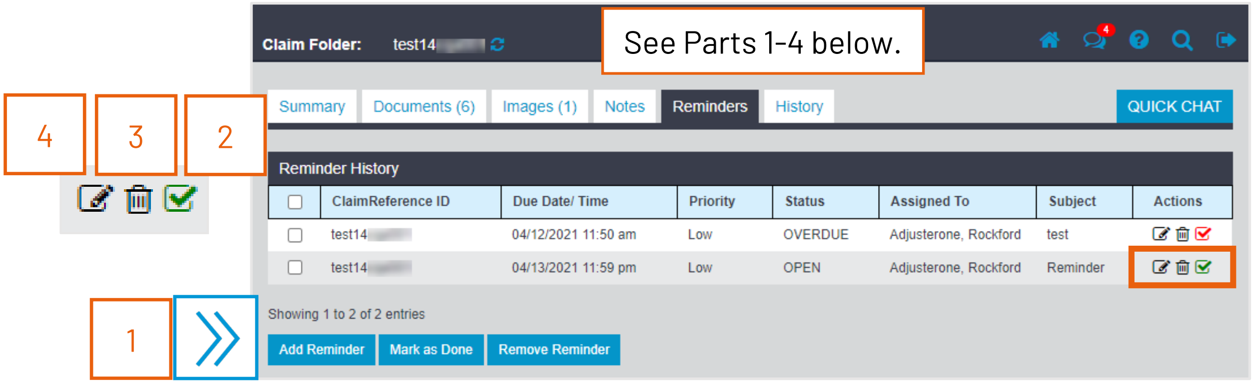
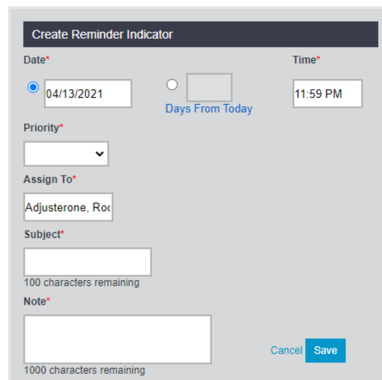
Reminders Page The Reminders Page contains a list of claim folder reminders.



<table>
<tr><th>Part</th><th>Description</th></tr>
<tr><td>1</td><td>

Add a Reminder

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.



Step	Action
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**.

</td></tr>
<tr><td>2</td><td>

Mark a Reminder as Done **Status:** Open **Status:** Overdue

Step	Action
1	Select the **Mark as Done** icon in the Actions column.
2	Then click **Yes** to confirm.

</td></tr>
<tr><td>3</td><td>

Remove a Reminder

Step	Action
1	Select the **Delete** icon in the Actions column.
2	Then click **Yes** to confirm.

</td></tr>
<tr><td>4</td><td>

Edit a Reminder

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.

</td></tr>
</table>

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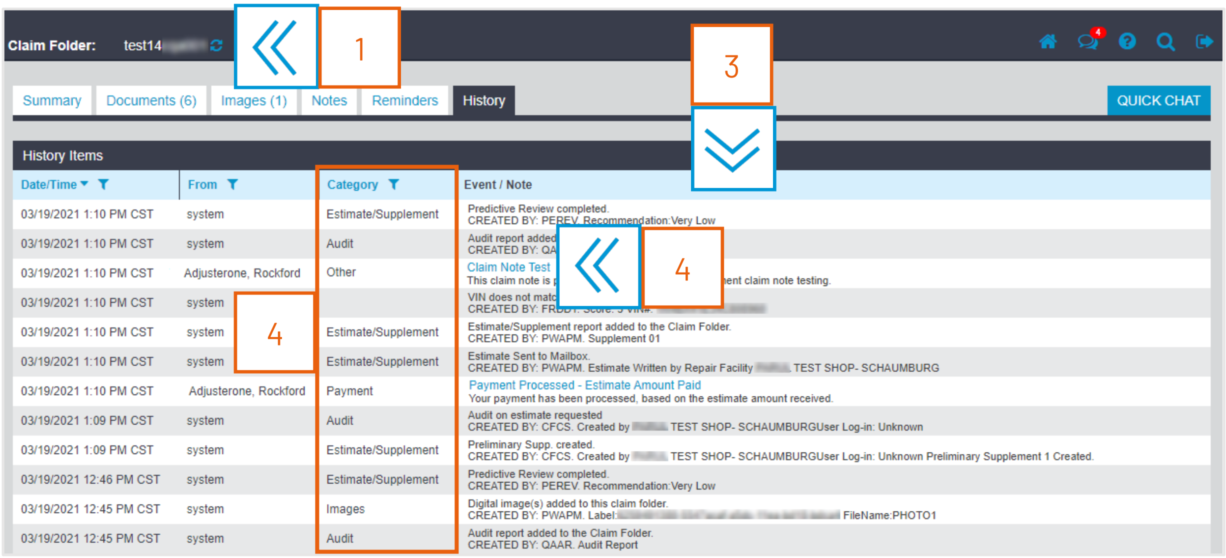
History Page

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.



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

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