

# How to Merge a Workfile with an Insurance Assignment

## Overview

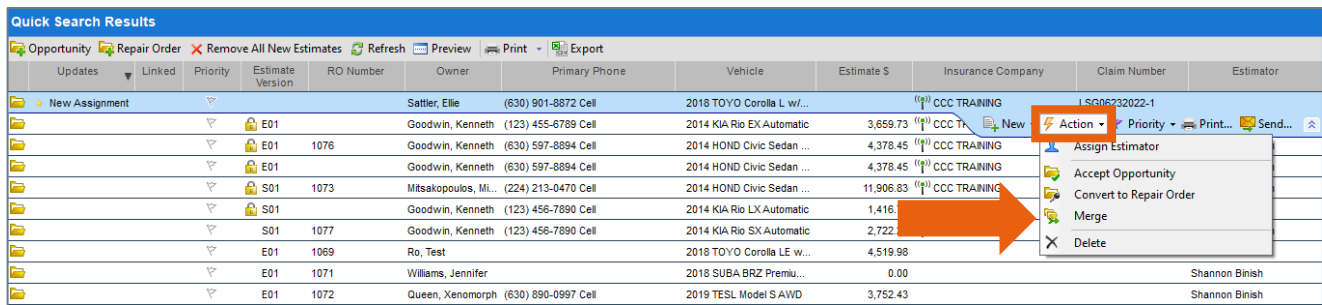
There will be occasions when you will need to merge an existing, manually created workfile with an Insurance Company Assignment or an EMS Assignment. You can merge them with a New Assignment if the manually created workfile is not Locked or a Total Loss.

This job aid describes how to merge an existing Workfile with an Insurance Company Assignment.

## Procedure

Use the following steps to merge a manually created Workfile with an Assignment from the Insurance Company:

Step	Action
1	To begin, make sure you are on the Workfiles View so that you can see all of your Workfiles and Assignments.
2	Click once on the <b>New Assignment</b> to select it.



3	<p>Go to <b>Action</b> on the mini-toolbar, and select <b>Merge</b>. The <b>Merge-Select Workfile</b> screen will open.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Merge</p> <p><b>Select Workfile</b></p> <p>Please search for and select the workfile to merge with. Search by vehicle owner, claim number, make, model, and/or VIN.</p> <p>Insurance Company: CCC TRAINING</p> <p>Search Terms: <input type="text"/> Match all of the words <input type="button" value="Search"/></p> <p style="text-align: center; color: blue; font-weight: bold;">No search results found</p> <p style="text-align: right;"><input type="button" value="Next"/> <input type="button" value="Cancel"/></p> </div>
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## How to Merge a Workfile with an Insurance Assignment, Continued

Procedure,  
continued

Step	Action
4	Enter a Search term. Then click <b>Search</b> , or leave blank and <b>Search</b> .
5	Select the Workfile to merge.
6	Click <b>Next</b> . The Confirm Merge screen displays.

Step	Action
7	Review and confirm the Assignment and Workfile information to be merged.
8	Click <b>Next</b> .
9	If you have already added images or attachments, select the ones to merge with the Assignment and send to the Insurer.

10	Click <b>Finish</b> .
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**Note:** The workfile opens for you to continue working. Remember to Save and Close.