

Associating Claim Documentation to a Different Assignment

Claim documentation is now automatically associated to a specific assignment in Mobile Claims and in Claims Connect when it is added. This includes all objects (documentation) in the claim: Estimates, floorplans, forms, documents, photos, and photo folders.

Important to note:

1. The assignment must be accepted before you can apply claim documentation to that assignment. Additionally, if there is only one assignment made to a vendor, then all added documentation by that vendor will be under that assignment.
2. Estimates can only be associated to another of the vendor's assignment on the same claim if its status is In Progress and has never been changed to another status previously.
3. When adding a new object, there is a confirmation to which assignment it has been associated.
4. A vendor can only use the change assignment feature to associate objects between his own assignments on the same claim.

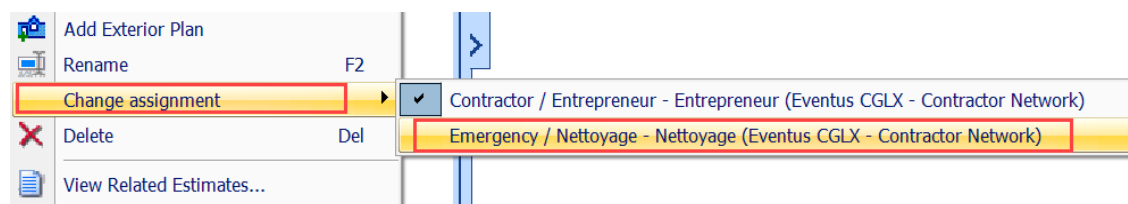
To change an associated assignment in Mobile Claims:

Diagram Example: By default, all added objects, including diagrams, will be associated with the *active* assignment.

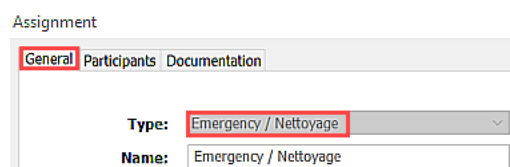
1. In this example, the active assignment is the *Contractor assignment*. When adding the diagram in this example, a confirmation of the association appears at the bottom of the claim explorer. As the screenshot shows, you can select *Change assignment*, then select the *Emergency* assignment below.



*Note: You can also right click the floorplan at any time and select *Change assignment*.



2. To view the documentation associated with each assignment:
Navigate to the assignment and click to open the box. By default, you will be on the general tab.



Each Assignment box also has a Documentation tab that shows which objects are associated to that assignment.

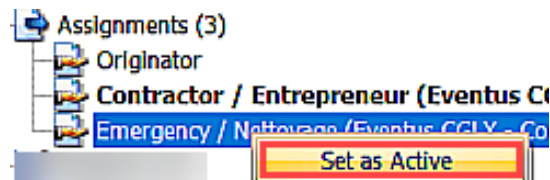
Assignment

| General Participants Documentation | | | | |
|--|-----------------------------------|-------------|---------------|--|
| Name | Company | Object Type | Status / Type | |
|  Floorplan | Eventus CGLX - Contractor Network | Diagram | Floor Plan | |
|  Emergency | Eventus CGLX - Contractor Network | Estimate | In progress | |
|  Photos 2 (Eventus CGLX - Contractor Network) | Eventus CGLX - Contractor Network | Photos | | |

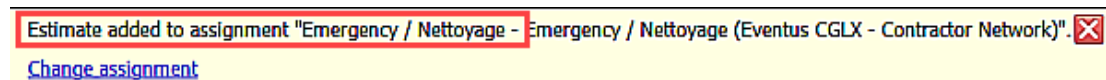
Estimate Examples: As with other claim documentation, all added objects, including estimates, will be associated with the *active* assignment by default. Therefore, when working with multiple estimates, it's important to make sure that the estimate is associated with the correct assignment. Here, we have listed a couple of ways to achieve this.

Example 1:

1. Look through the Claim Explorer and locate Assignments. Notice that *Contractor* assignment is bold, and that *Emergency* is not. A bold assignment indicates that the assignment is currently active. If you wish to add an estimate that is associated with the *Emergency* assignment, you can click the *Emergency* assignment and select *Set as Active*



2. Now, right click Estimates in the Claim Explorer and add an *Emergency* estimate. You will receive a confirmation when you add the estimate that it is going to that assignment.

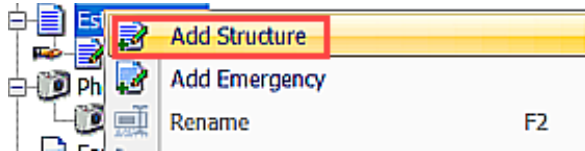


*Note that, as with diagrams and other documentation, you can change the associated assignment using the *Change assignment* option seen here.

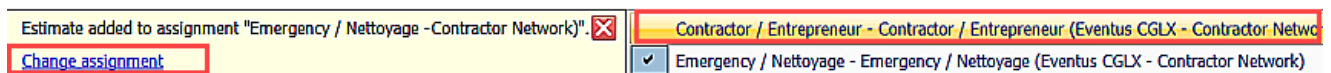
Note: In addition to the confirmation statement showing the associated assignment, the *Emergency* estimate is also **bold**, indicating that it is the *active estimate*. This indicates that any line items you add to a diagram will go into the emergency estimate, since it is now set to active.

Example 2:

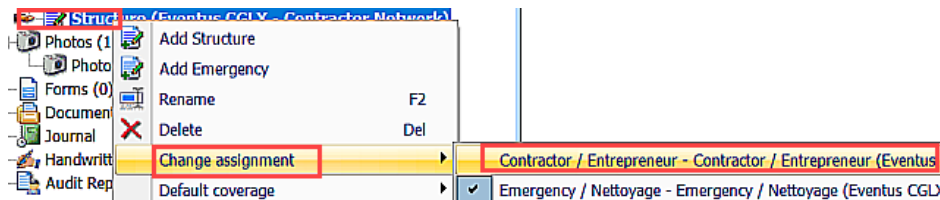
1. In this case, we'll leave the active assignment as the Emergency assignment. Right click estimates and select *Add Structure*.



2. When you add the Structure estimate, the confirmation will show that it is associated with the *Emergency* assignment. To change this, select change assignment and choose the *Contractor* assignment.



3. Another way to achieve this is to right click on the new estimate, Structure, and select *Change assignment* – *Contractor / Entrepreneur*.



4. As in the earlier examples, you can always look in the assignment boxes, on the documentation tab, to confirm the documents associated with each assignment.

| Assignment | | | | |
|------------------------------------|-----------------------------------|-------------|---------------|--|
| General Participants Documentation | | | | |
| Name | Company | Object Type | Status / Type | |
| Floorplan | Eventus CGLX - Contractor Network | Diagram | Floor Plan | |
| Structure | Eventus CGLX - Contractor Network | Estimate | In progress | |

Important reminders for assignments and estimates:

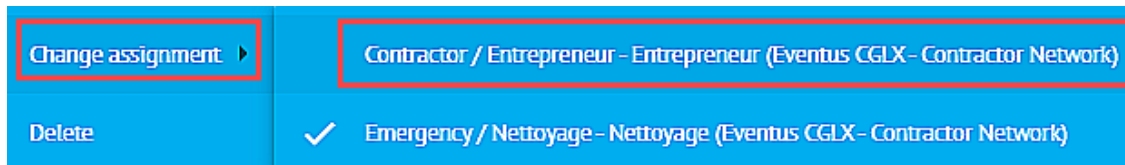
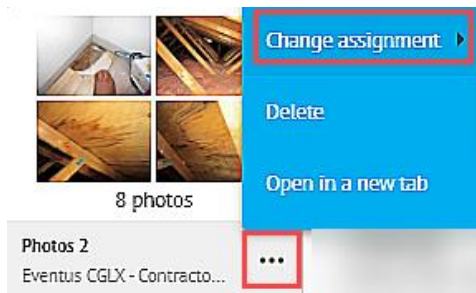
Each assignment has its own set of statuses. It's important to make sure you are marking statuses for each assignment.

The **active** assignment is the **bolded** assignment. When you add claim objects, they will be associated to the active assignment unless you change the associated assignment.

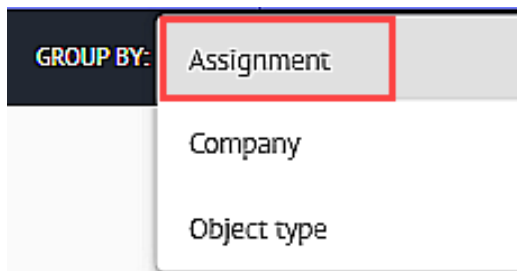
The **active** estimate is the **bolded** estimate. This means when you add line items to a diagram, they will go into the estimate that is bolded.

To change an associated assignment in Claims Connect:

1. Open the claim. In the Documentation tab, navigate to the item you are changing. In this case, we chose photos. Click the ellipsis, or the ellipsis in the gray box, and click *Change assignment*. From there choose the appropriate assignment.




2. You can now group your items in the Documentation tab by Assignment to view the documents associated with each assignment.



Example of documents grouped by the *assignment view*:

Originator (ACADEMIE CLGX, INC.)




0 photos

Photos
ACADEMIE CLGX, INC.


Contractor / Entrepreneur - Entrepreneur (Eventus CGLX - Contractor Network)

COMPLETED



\$11,415.83

Structure
Eventus CGLX - Contracto...




8 photos

Photos 2
Eventus CGLX - Contracto...

Emergency / Nettoyage - Nettoyage (Eventus CGLX - Contractor Network)


IN PROGRESS




\$7,997.56

Emergency
Eventus CGLX - Contracto...

FLOORPLAN



Floorplan
Eventus CGLX - Contracto...



Apr 27, 2021

Invoice.docx
Eventus CGLX - Contracto...

- You can also view this in the *Documentation tab* of the Assignments page in Claims Connect.

| Contractor / Entrepreneur - Entrepreneur... - Eventus CGLX - Contractor Netw... | | |
|---|-----------------------------------|-------------------|
| GENERAL | STATUSES | PARTICIPANTS |
| DOCUMENTATION | | |
| Name | Company | Status / Type |
| Estimates | | |
| Structure | Eventus CGLX - Contractor Network | Completed(locked) |
| Photos | | |
| Photos 2 | Eventus CGLX - Contractor Network | |