

# PLNAR for CoreLogic/Symbility Claims Connect

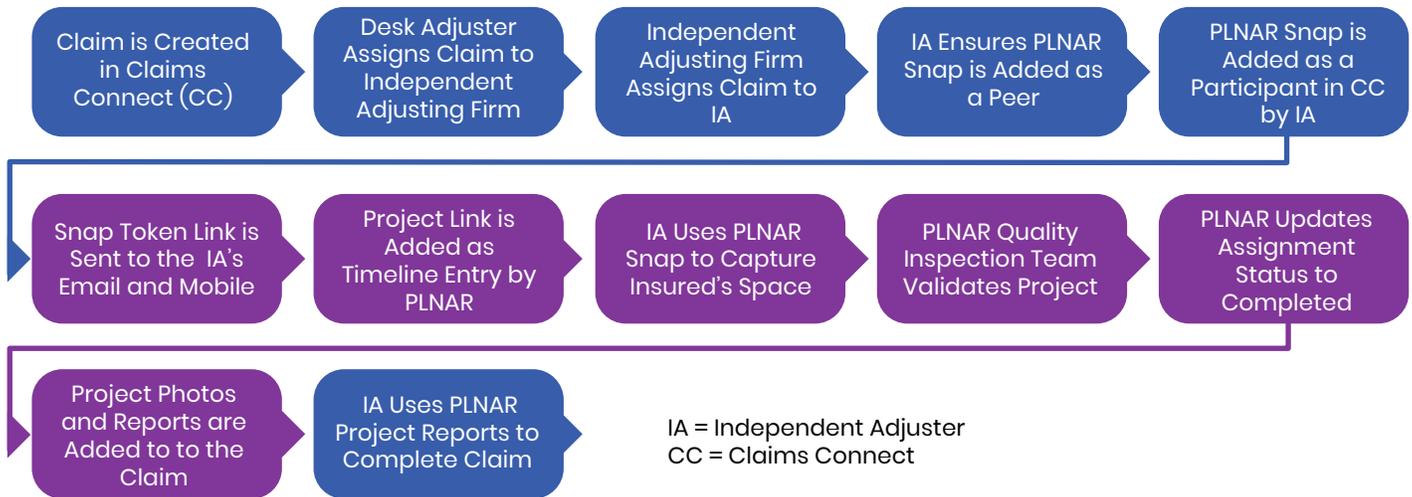
## At-A-Glance Workflows

CoreLogic/Symbility Claims Connect Integration with PLNAR Snap Supports two workflows:

- Enabling an Independent Adjuster to Use PLNAR Snap
- Enabling the Insured to Use PLNAR Snap

### Workflow 1: Enabling the Independent Adjuster

#### Overview



#### Step-by-Step

##### STEP 1 Desk Adjuster Assigns Claim to Independent Adjusting Firm

	Symbility ID	Company Name	Contact Name	Phone	City	Prov./State	User Type	Delegated Authority
<input checked="" type="checkbox"/>	875-032-029	PLNAR - Intermediary adjusting	Andy Geff	(512) 730-3650	Astin	Texas	Intermediary - Claim Management Company	<input type="checkbox"/>
<input checked="" type="checkbox"/>	917-131-475	PLNAR Snap	Andy Greff	(512) 730-3650	Austin	Texas	Independent Adjuster	<input type="checkbox"/>

##### STEP 2 IA Firm Accepts Assignment

Accept claim assignment "PLNAR Snap?"

From: Lone Star Insurance  
Assigned: Monday, September 14, 2020

By accepting the claim assignment, you will be billed for this claim file.  
By declining the claim assignment, you will not be billed for this claim file.

##### And Assigns to an Independent Adjuster

	Symbility ID	Company Name	Contact Name	Phone	City	Prov./State	User Type
<input checked="" type="checkbox"/>	929-372-264	PLNAR - 1099	Andy Greff	(512) 730-3650	Austin	Texas	Single User Independent Adjuster
<input type="checkbox"/>	917-131-475	PLNAR Snap	Andy Greff	(512) 730-3650	Austin	Texas	Independent Adjuster

# Workflow 1: Enabling the Independent Adjuster

## Step-by-Step (continued)

### STEP 3

IA Adds PLNAR Snap as a Participant. The IA Must First Add PLNAR Snap as a Peer Before PLNAR Snap can be Added as a Participant

My Peer List						
<input type="checkbox"/>	Company Name	Contact Name	Phone	City	Prov./State	User Type
<input checked="" type="checkbox"/>	PLNAR Snap	Andy Greff	(512) 730-3650	Austin	Texas	Independent Adjuster

Page 1 of 1 (1 record)

Add selected peer(s)

PLNAR Retrieves the IA's contact information from their profile and sends both and SMS and email with the PLNAR Snap token URL

The Project Token URL is also added as a Claims Connect Timeline Entry

4:16 pm PLNAR Snap Project Link Created: <https://snap.plnar.co/link/zu7N>

Text Message Today 4:16 PM

Fred Johnson at Global X Insurance has requested that you use the PLNAR SNAP app to document your space.

Tap this link to download & begin: <https://snap.plnar.co/link/zu7N>

Your project code is: A5CAF34

Reply 22 for assistance or STOP to opt-out.

General

General

Username:

First name:

Last name:

e-mail:

Phone:

Old password:

New password:

Confirm password:

User group:

User role:

User Region:

User Area:

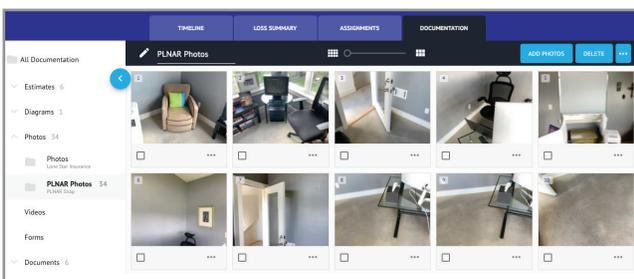
### STEP 4

Upon Project Completion by PLNAR's Quality Inspection team, a timeline entry with the PLNAR share link will be added, the assignment to PLNAR Snap is marked as completed, and the PLNAR Snap photos and documents are attached to the claim automatically.

3:23 pm	5 document(s) added to the claim.	...
3:23 pm	34 photo(s) added to the claim.	...
3:15 pm	The assignment "PLNAR Snap" has been marked as completed.	...
3:14 pm	PLNAR Share Link: <a href="https://portal.plnar.co/#1/share/project/SNP-317392">https://portal.plnar.co/#1/share/project/SNP-317392</a>	...

### STEP 5

#### Attached Photos

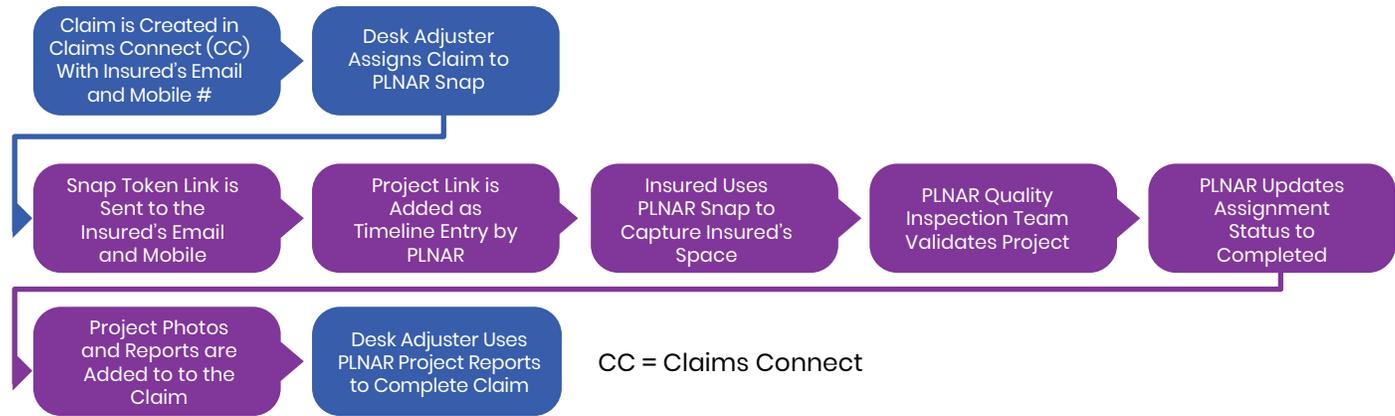


#### Attached Documents

Name	Company	Status / Type	Total	
Documents \ PLNAR Attachments				
PRO REPORT - SNP-317392.pdf	PLNAR Snap	PDF	1018 KB	...
SUMMARY REPORT - SNP-317392.pdf	PLNAR Snap	PDF	346 KB	...
MEASUREMENTS - SNP-317392.csv	PLNAR Snap	CSV	1 KB	...
2D PLANS - SNP-317392.zip	PLNAR Snap	ZIP	15 KB	...

## Workflow 2: Enabling the Insured

### Overview



### Step-by-Step

**STEP 1** Desk Adjuster ensures that the Insured's Mobile and Email are entered in the Loss Summary

**Loss Summary** [EDIT] [OPTIONS] [...]

**General Information**

**Claim information**

Claim number: Self-Assign-Test      Date of loss: 09/07/2020 12:00 AM  
 Policy number: 3333

**Insured information**

First name: Self      Mobile: (512) 917-5940  
 Last name: Assign      Email: self.assign@mailinator.com  
 Address: Texas

**STEP 2** Desk Adjuster assigns claim directly to PLNAR Snap. If the Claim Originator and Assigner are the same, PLNAR uses the Insured's information entered in the loss summary to send the PLNAR Snap token link via email and SMS

**Assign Claim** Claim #Self-Assign-Test, Self Assign

Search panel - All companies (no filter applied) Search for appropriate vendors based on claim [Clear] [X]

Branch: Lone Star Insurance Group: default

	Symbility ID	Company Name	Contact Name	Phone	City	Prov./State	User Type	Delegated Authority
<input type="checkbox"/>	875-032-029	PLNAR - Intermediary adjusting	Andy Geff	(512) 730-3650	Astin	Texas	Intermediary - Claim Management Company	<input type="checkbox"/>
<input checked="" type="checkbox"/>	917-131-475	PLNAR Snap	Andy Greff	(512) 730-3650	Austin	Texas	Independent Adjuster	<input type="checkbox"/>

Page 1 of 1 (2 records)

Assign selected vendor(s)

The Project Token URL is also added as a Claims Connect Timeline Entry and the insured receives an SMS message with token link

4:16 pm PLNAR Snap Project Link Created: <https://snap.plnar.co/link/zu7N>

Text Message Today 4:16 PM

Fred Johnson at Global X Insurance has requested that you use the PLNAR SNAP app to document your space.

Tap this link to download & begin: <https://snap.plnar.co/link/zu7N>

Your project code is: A5CAF34

Reply 22 for assistance or STOP to opt-out.

**STEP 3** The rest of the flow is the same after the Insured submits the project