

ITEL Integration

Test Starts Outside Mobile Claims

Disclaimer: This job aid was created using a demo insurance company with generic settings. Please refer to your specific carrier guidelines for proper claim and estimate settings.

Step 1

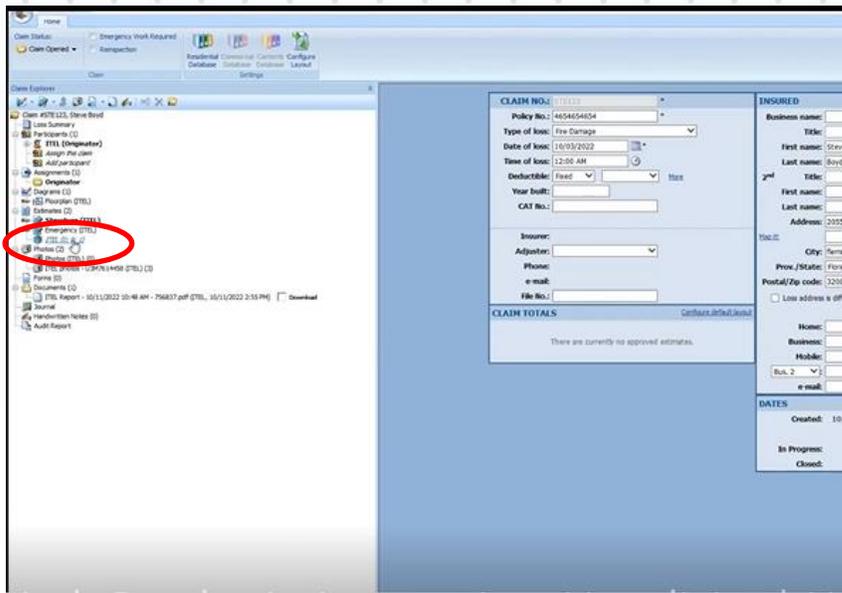
Begin by clicking 'Synchronize' once you have logged into Mobile Claims to view ITEL test results that were started outside of Mobile Claims, either through ITELNow or a Physical Sample Test. Then click on your claim assignment to open the claim from your claim list.

The screenshot shows the software interface with a menu bar at the top containing 'Home', 'View', and 'Misc'. Below the menu bar are several icons for actions: 'Create Claim', 'Create Temporary Claims', 'Recent Claims', 'Claim Properties', 'Merge Temporary Claim', 'Import Estimates', 'Delete Claim', 'Acquire Ownership', 'Release Ownership', 'Upload Claim', 'Download Claim', 'Stop Participating', and 'Synchronize'. The 'Synchronize' button is circled in red. Below the menu bar is a table of claims with columns for Claim No., File No., Insured, Claim Status, Assignment Status, Alerts, Assignment S., Date of Loss, Type of Loss, Policy No., Loss Address, Home Phone, Age, Current Garage, Policy Code, and Remarks. A red arrow points to the first row of the table.

Claim No.	File No.	Insured	Claim Status	Assignment Status	Alerts	Assignment S.	Date of Loss	Type of Loss	Policy No.	Loss Address	Home Phone	Age	Current Garage	Policy Code	Remarks
#12 379222		Brown, John	Claim Opened				04/01/2012 10:00 AM	Storm Damage	4634064	Henryland, Florida		138	Str. Alys at Ocean C...	32013	
#12 379224		Blue, Steve	Claim Opened				04/01/2012 10:00 AM	Water Damage	4634064	3055 Arden Forest Place, Penning...		138	Str. Alys at Ocean C...	32013	
#12 379225		STYLITE, SCHEDEL...	Claim Opened				04/01/2012 10:00 AM	Storm Damage	0210493472780...	31157 PARKWAY, WOODBRIDGE, ...		416	Str. Alys at Ocean C...	32256	
#12 379226		P. David	Claim Opened				04/01/2012 10:00 AM	Storm Damage	07-12345	Green Cove Springs, Florida		4076	Charl Park (Str.)	32043	
#12 379227		STL, TRL	Claim Opened				04/01/2012 10:00 AM		0000000	Florida		134	Str. Alys at Ocean C...	47400	
#12 379228		STL, TRL	Claim Opened				04/01/2012 10:00 AM		7784707035816...	214 N POPLAR ST, BELL, OR, Kansas		140	Str. Alys at Ocean C...		
#12 379229		Sherman, Stephen	Claim In Progress				04/01/2012 10:00 AM		0000000	Florida		134	Str. Alys at Ocean C...		
#12 379230		Kamran, Ayesha	Claim In Progress				04/01/2012 10:00 AM		0000000	Florida		134	Str. Alys at Ocean C...		
#12 379231		Valdes, Ledy	Claim In Progress				04/01/2012 10:00 AM	Storm Damage	222222	Miami Beach, Florida		234	Str. Alys at Ocean C...	32132	
#12 379232		L.A.L. L&L	Claim Opened				04/01/2012 10:00 AM	Structural Damage	233	Florida		242	Str. Alys at Ocean C...	32137	
#12 379233		Burt, Nick	Claim Opened				04/01/2012 10:00 AM	Water Damage	463406404	2555 Arden Forest Place, Penning...		138	Str. Alys at Ocean C...	32013	
#12 379234		Taylor, Stephen	Claim Opened	Job Started			04/01/2012 10:00 AM	Storm Damage	4600000	1913 Green Heather Lane, Cal...		136	Str. Alys at Ocean C...	32013	
#12 379235		Taylor, Stephen	Claim Opened				04/01/2012 10:00 AM	Storm Damage	5600000	Florida		136	Str. Alys at Ocean C...	32013	
#12 379236		Taylor, Stephen (S)	Claim Opened				04/01/2012 10:00 AM	Storm Damage	5600000	Florida		136	Str. Alys at Ocean C...	32013	
#12 379237		Taylor, Stephen	Claim Opened				04/01/2012 10:00 AM	Storm Damage	5600000	Florida		136	Str. Alys at Ocean C...	32013	
#12 379238	1332	green, Jerry	Claim Opened	Assignment Sent		02/01/2012 3...	02/01/2012 10:00 AM	Fire Damage	463406404	Florida		6164	Str. Alys at Ocean C...	32013	
#12 379239		John, Jerry	Claim Opened				02/01/2012 10:00 AM	Fire Damage	463406404	Florida		6164	Str. Alys at Ocean C...	32013	
#12 379240		John, Jerry	Claim Opened				02/01/2012 10:00 AM	Fire Damage	463406404	Florida		6164	Str. Alys at Ocean C...	32013	
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#12 379259		John, Jerry	Claim Opened				02/01/2012 10:00 AM	Fire Damage	463406404	Florida		6164	Str. Alys at Ocean C...	32013	
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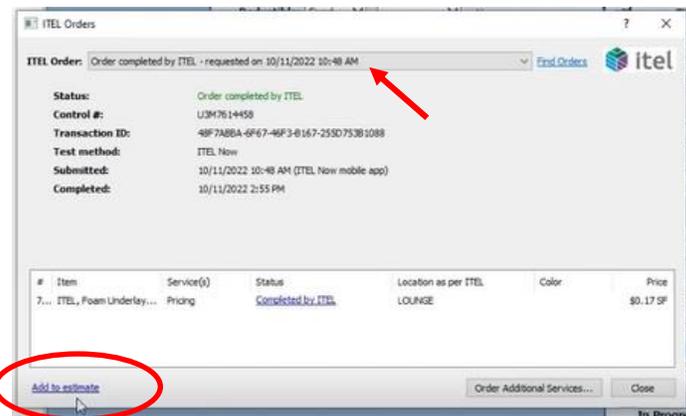
Step 2

Click on ITEL within the Claim Explorer tree to open the ITEL Orders box to view completed orders.



Step 3

Find the completed order from the dropdown at the top of the dialog box, then click 'Add to estimate' to initiate adding an ITEL price to a room or room(s) in a Floorplan.



If you are having trouble locating the completed order for your claim, you can click on ‘Find Orders’ to search for orders sent by ITEL for your company, but that Claims Connect/Mobile Claims was not able to automatically match to a claim. Enter search criteria and click ‘Search’.

Find ITEL Unresolved Orders

This feature allows you to find orders sent by ITEL for your company, but that Claims Connect was not able to automatically match to a claim.

Search criteria

Order submission date: 10/27/2022 to 11/02/2022

Control #:

Associated e-mail:

Claim #: 2022

Loss city: wauwatosa

Insured last name: miller

Loss postal/zip code:

Include resolved orders: Yes No

Search results

Control #	Order Date	Order M...	Claim #	Insured Last Name	Loss City	Loss Post...	Status
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Save and Attach to Claim... Close

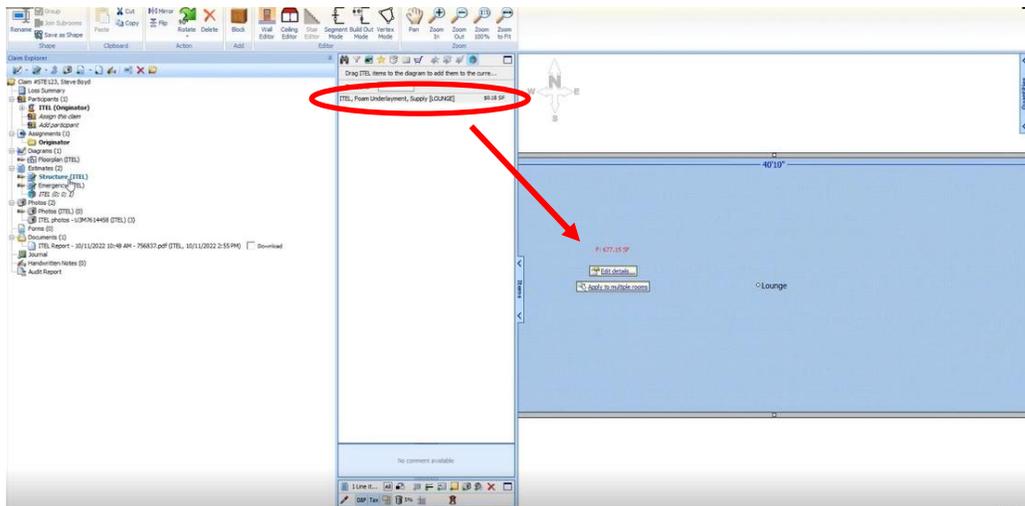
If your search returned the ITEL report that belongs to your claim, you may select it from the Search Results and click the ‘Save and Attach to Claim” button that will enable once a report is selected from the list. The report will then attach to the claim.

Step 4 – Line Item or Assembly Steps

Line Item Steps

Line Item Step

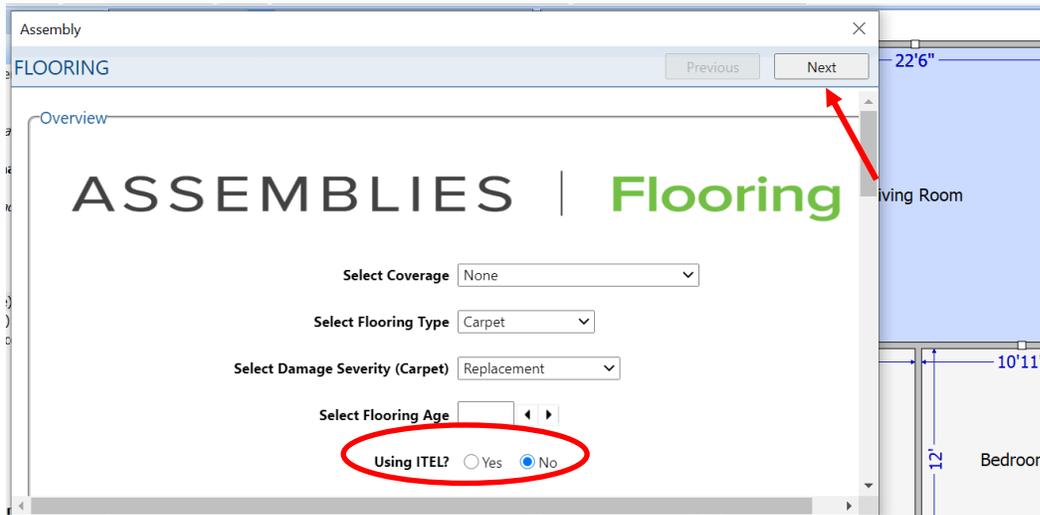
Within the Items blade on a Floorplan, select the ITEL, Supply line item from the database and drag & drop it onto the room(s) of the Floorplan where you wish to apply that line item to the estimate.



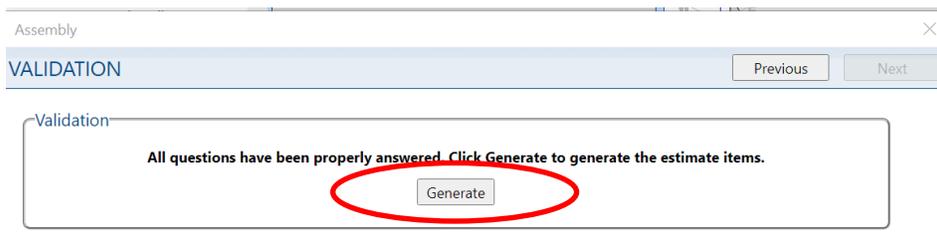
Assembly Steps

Assembly Step A

With an Assembly, you will select the Assembly from the list within the 'Items' blade, then drag & drop it to the portion of the diagram you want to apply it to or drop it on the whitespace to apply it to the whole diagram. Fill out the Assembly questionnaire, making sure to click 'Yes' on the 'Using ITEL?' question and answering all other pertinent questions. Click 'Next' once finished, then 'Generate' to generate the estimate items.



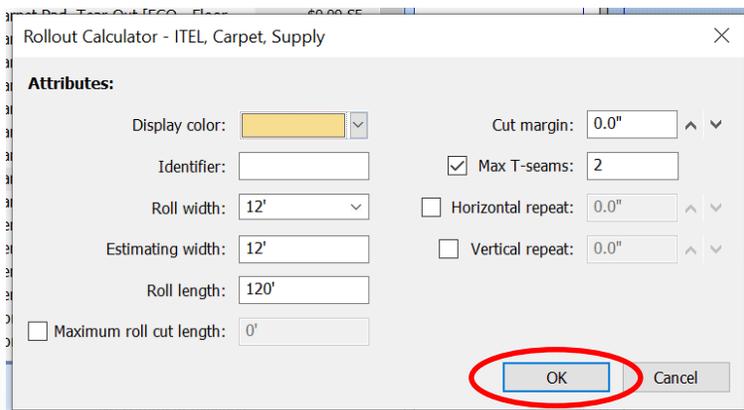
The screenshot shows the 'Assembly' dialog box with the 'FLOORING' tab selected. The 'Overview' section displays 'ASSEMBLIES | Flooring'. Below this, there are several dropdown menus: 'Select Coverage' (None), 'Select Flooring Type' (Carpet), and 'Select Damage Severity (Carpet)' (Replacement). There is also a 'Select Flooring Age' field with left and right arrow buttons. At the bottom, the 'Using ITEL?' question is highlighted with a red circle, with the 'No' radio button selected. A red arrow points to the 'Next' button in the top right corner. The background shows a floor plan with dimensions like 22'6" and 10'11" for a Living Room and Bedroom.



The screenshot shows the 'Assembly' dialog box with the 'VALIDATION' tab selected. The 'Validation' section contains the message: 'All questions have been properly answered. Click Generate to generate the estimate items.' Below this message, the 'Generate' button is highlighted with a red circle. The 'Previous' and 'Next' buttons are visible in the top right corner.

Assembly Step B

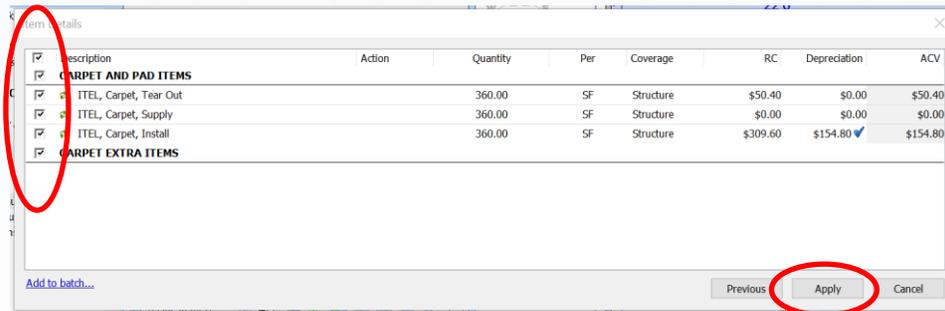
If the Rollout Calculator is enabled for your company and you are estimating for a material that utilizes the rollout method, the RC dialog box will appear next. Verify the flooring attributes and click 'OK'.



The screenshot shows the 'Rollout Calculator - ITEL, Carpet, Supply' dialog box. It has a title bar with a close button. The 'Attributes:' section includes several fields: 'Display color' (yellow), 'Identifier' (empty), 'Roll width' (12'), 'Estimating width' (12'), 'Roll length' (120'), and 'Maximum roll cut length' (0'). On the right side, there are 'Cut margin' (0.0"), 'Max T-seams' (checked, 2), 'Horizontal repeat' (0.0"), and 'Vertical repeat' (0.0"). At the bottom, the 'OK' button is highlighted with a red circle, and the 'Cancel' button is to its right.

Assembly Step C

Select the line items that you wish to add to your estimate by checking the boxes and clicking 'Apply'.



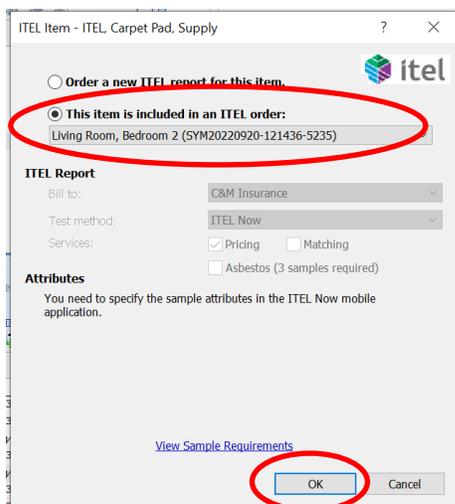
The 'Item Details' dialog box displays a table with the following data:

Description	Action	Quantity	Per	Coverage	RC	Depreciation	ACV
CARPET AND PAD ITEMS							
<input checked="" type="checkbox"/> ITEL, Carpet, Tear Out		360.00	SF	Structure	\$50.40	\$0.00	\$50.40
<input checked="" type="checkbox"/> ITEL, Carpet, Supply		360.00	SF	Structure	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/> ITEL, Carpet, Install		360.00	SF	Structure	\$309.60	\$154.80	\$154.80
CARPET EXTRA ITEMS							

At the bottom of the dialog, there are three buttons: 'Add to batch...', 'Previous', and 'Apply'. The 'Apply' button is circled in red.

Assembly Step D

The ITEL Item box will open next. Select 'This item is included in an ITEL Order' and find the order in the dropdown. The appropriate selections will default into the 'Bill to' and 'Test method' dropdowns based on the type of report that was previously performed or already in the claim. Click 'OK' to apply the pricing from that ITEL order to the line items in the Assembly.



The 'ITEL Item - ITEL Carpet Pad, Supply' dialog box shows the following options:

- Order a new ITEL report for this item.
- This item is included in an ITEL order:
Living Room, Bedroom 2 (SYM20220920-121436-5235)

Below these options, there are dropdown menus for 'Bill to:' (C&M Insurance) and 'Test method:' (ITEL Now). There are also checkboxes for 'Services:' (Pricing, Matching, Asbestos (3 samples required)).

At the bottom, there is a link 'View Sample Requirements' and two buttons: 'OK' and 'Cancel'. The 'OK' button is circled in red.

Step 5

If your ITEL order contains multiple items that are being priced (ex: carpet & pad, or flooring & underlayment), please refer to the [ITEL Tips & Tricks](#) reference document for the steps on applying the additional item(s) pricing to the estimate.

Step 6

If you have multiple Floorplans in the claim with the same flooring and would like to apply the pricing from the ITEL report previously ordered, first, you simply need to navigate to the other Floorplan and follow the 'Line Item' or 'Assembly' step(s) from above. The 'ITEL Item' box for the flooring that was selected will populate at this point. Select 'This item is included in an ITEL order' and select the order from the dropdown menu. The originating company preferences will be selected by default in the Bill to dropdown. Double check the selections are proper and then click 'OK'.

ITEL Item - ITEL Carpet Pad, Supply

Order a new ITEL report for this item

This item is included in an ITEL order:
Living Room, Bedroom 2 (SYM20220920-121436-5235)

ITEL Report

Bill to: C&M Insurance

Test method: ITEL Now

Services: Pricing Matching
 Asbestos (3 samples required)

Attributes

You need to specify the sample attributes in the ITEL Now mobile application.

[View Sample Requirements](#)

OK Cancel

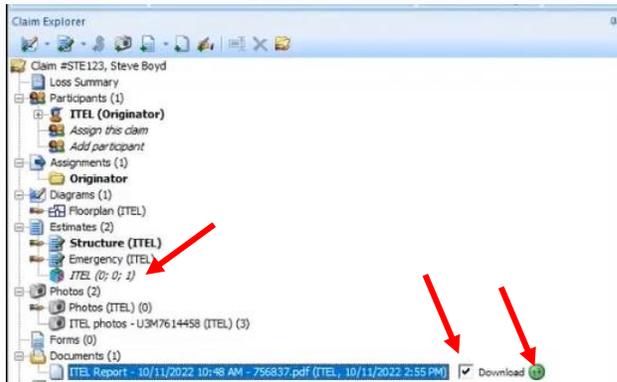
Step 7

In the Estimate, you will now see the ITEL, Supply line items with the applied pricing from the report.

Description	Quantity	Unit Price	Per	Total Cost
ESTIMATE: Structure (ITEL)				
In progress Claim #STE123, Steve Boyd				
FLOORPLAN: Floorplan				
Lounge				
Length: 40'10" Width: 16'7" Height: 8' Flat				
Walls: 918.68 SF Walls-subs: 918.68 SF Walls-subs-cas-bsbd: 885.18 SF				
Doors: 0.00 SF Windows: 0.00 SF Openings: 0.00 SF Missing Walls: 0.00 SF				
Floor: 677.15 SF Ceiling: 677.15 SF Perim (F): 114.82 LF Perim (C): 114.82 LF				
1 ITEL, Foam Underlayment, Supply	677.15	\$0.18	SF	\$121.89
Includes 5% waste on material price.				
Lounge - Subtotal (1 item)				\$121.89
Floorplan - Subtotal (1 item)				\$121.89

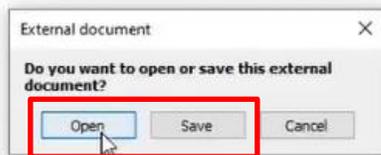
Step 8

The ITEL node in the Claim Explorer will show the items moved to the 'Order Completed' position. The ITEL report will be available in the 'Documents' section of the Claim Explorer tree, where you can check the box next to 'Download', then click the green icon to download the report to the assignment.



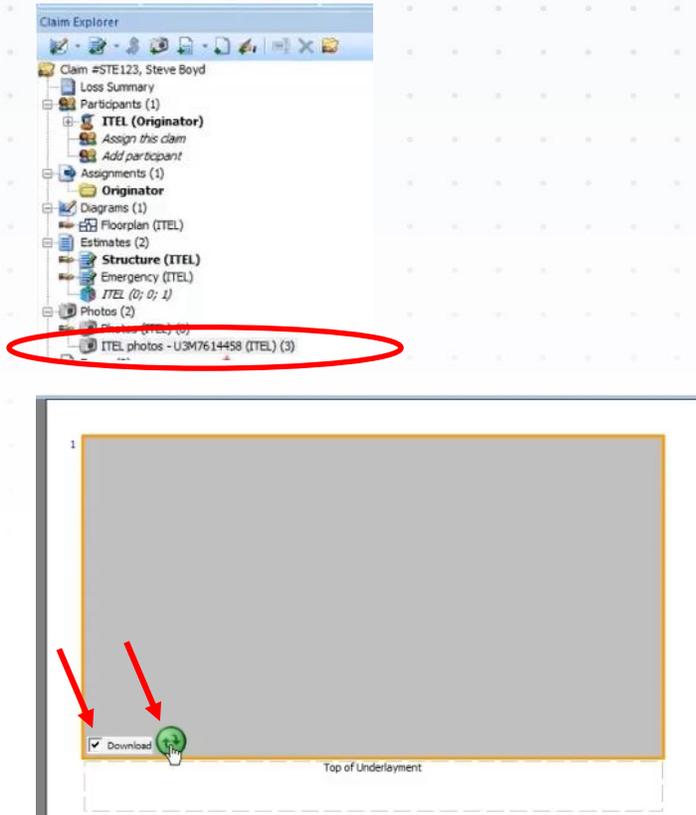
Step 9

To view the downloaded ITEL report, double click on the report link and click 'Open' to view in a PDF reader or click 'Save' to save to your desktop files.



Step 10

Photos taken using the ITELNow app will also be sent and can be downloaded by selecting the ITEL photos link, checking the box next 'Download' on each photo, then clicking the green download icon.



Step 11

The ITEL pdf report will also be available in Claims Connect in the Documentation page under Documents and the ITEL order form will be available under Forms.

