



Job Aid

Mandatory Assignment Status Configuration

Issue 1
May 10th, 2023

Mandatory Assignment Status Configuration

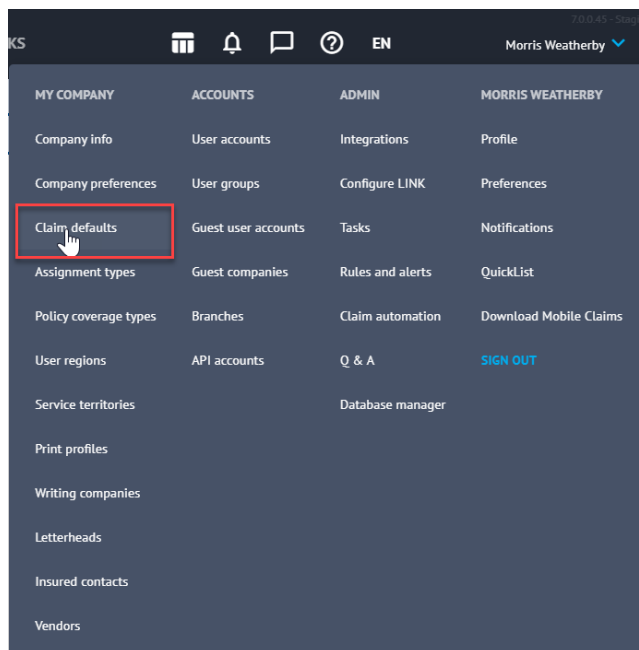
This job aid will guide a Company Administrator through the steps to configure mandatory assignment statuses for their originator and participant assignments.

Note: This document was created using a demo insurance company with generic settings. Keep in mind that your screens may appear slightly different. Please refer to your specific carrier guidelines for proper claim and estimate settings.

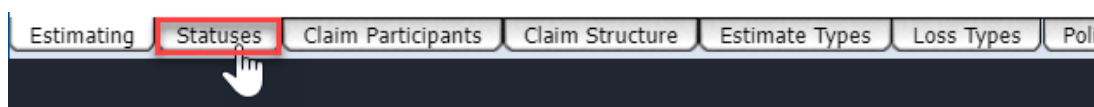
1. To set prerequisite/required statuses for Originator Assignments, first navigate to the User name and click to open the menu.



2. Click **Claim Defaults** from the My Company menu.



3. Navigate to the tabs at the bottom of the page and select **Statuses**.



- Click the **Define the statuses and prerequisite/required statuses** hyperlink.



- Select the pertinent assignment statuses for your company's originator assignments by checking the box next to the status.

A screenshot of the 'Originator Assignment Statuses' form. The form has a dark blue header with the title 'Originator Assignment Statuses' and two buttons: 'SAVE' and 'CANCEL'. Below the header, there is a tab labeled 'STATUSES'. The main content area is a table with two columns: 'Status' and 'Prerequisite/Required Statuses'. The table contains the following rows:

Status	Prerequisite/Required Statuses
<input checked="" type="checkbox"/> Assignment Sent	N/A
<input checked="" type="checkbox"/> Assignment Received	N/A
<input checked="" type="checkbox"/> Insured Contacted	N/A
<input checked="" type="checkbox"/> Inspection Scheduled	None
<input checked="" type="checkbox"/> Inspection Performed	None
<input type="checkbox"/> Mitigation Work Started	None
<input type="checkbox"/> Mitigation Work Completed	None
<input checked="" type="checkbox"/> Estimate Ready for Review	N/A
<input checked="" type="checkbox"/> Estimate Completed	N/A
<input checked="" type="checkbox"/> Estimate Approved	N/A
<input type="checkbox"/> Job Scheduled	None
<input type="checkbox"/> Job Not Sold	None
<input type="checkbox"/> Job Started	None
<input type="checkbox"/> Job Completed	None
<input checked="" type="checkbox"/> Assignment Completed	None
<input checked="" type="checkbox"/> Assignment Cancelled	N/A
<input checked="" type="checkbox"/> Assignment Declined	N/A
<input checked="" type="checkbox"/> Assignment Reopened	N/A

- Click the dropdown menu next to the status, where available, to view possible prerequisite statuses.

The screenshot shows the 'Originator Assignment Statuses' form. The 'STATUSES' tab is active. The table has two columns: 'Status' and 'Prerequisite/Required Statuses'. The 'Inspection Scheduled' status is selected, and its dropdown menu is open, showing options: 'Select all', 'Insured Contacted', and 'Inspection Scheduled'. A hand icon points to the 'Select all' option.

Status	Prerequisite/Required Statuses
<input checked="" type="checkbox"/> Assignment Sent	N/A
<input checked="" type="checkbox"/> Assignment Received	N/A
<input checked="" type="checkbox"/> Insured Contacted	N/A
<input checked="" type="checkbox"/> Inspection Scheduled	None
<input checked="" type="checkbox"/> Inspection Performed	
<input type="checkbox"/> Mitigation Work Started	
<input type="checkbox"/> Mitigation Work Completed	

☐ Select all
☐ Insured Contacted
☐ Inspection Scheduled

Check the box next to the desired prerequisite status(es). Checking **Select All** will check all boxes in the dropdown.

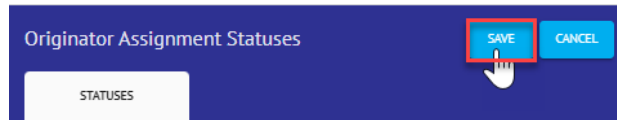
The screenshot shows the 'Originator Assignment Statuses' form. The 'STATUSES' tab is active. The table has two columns: 'Status' and 'Prerequisite/Required Statuses'. The 'Inspection Scheduled' status is selected, and its dropdown menu is open. The 'Select all' option is checked, and the other options, 'Insured Contacted' and 'Inspection Scheduled', are also checked. A hand icon points to the 'Select all' option.

Status	Prerequisite/Required Statuses
<input checked="" type="checkbox"/> Assignment Sent	N/A
<input checked="" type="checkbox"/> Assignment Received	N/A
<input checked="" type="checkbox"/> Insured Contacted	N/A
<input checked="" type="checkbox"/> Inspection Scheduled	None
<input checked="" type="checkbox"/> Inspection Performed	
<input type="checkbox"/> Mitigation Work Started	
<input type="checkbox"/> Mitigation Work Completed	

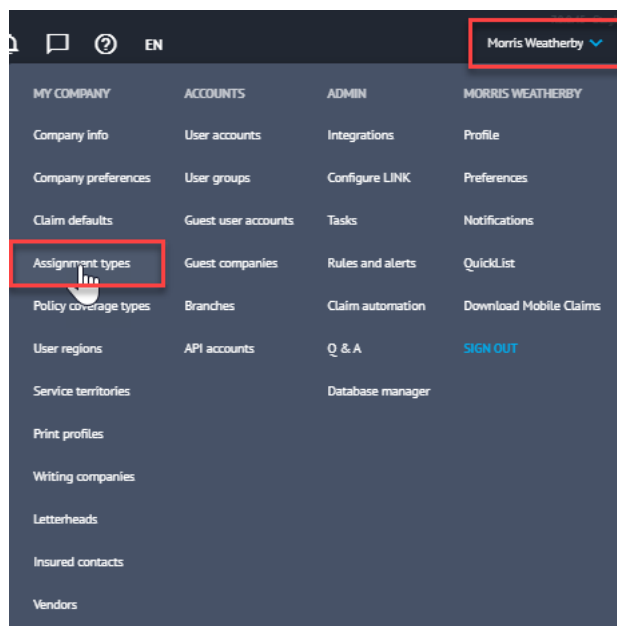
☒ Select all
☒ Insured Contacted
☒ Inspection Scheduled

Note: A prerequisite status is one that is required to be completed before the assignee can then complete the next status or before the assignee can complete the assignment. If a user attempts to skip a status or complete an assignment prior to completing all required or prerequisite statuses, an warning will present.

Click **Save** to save changes or **Cancel** to discard changes. Clicking either will close the blade as a result.



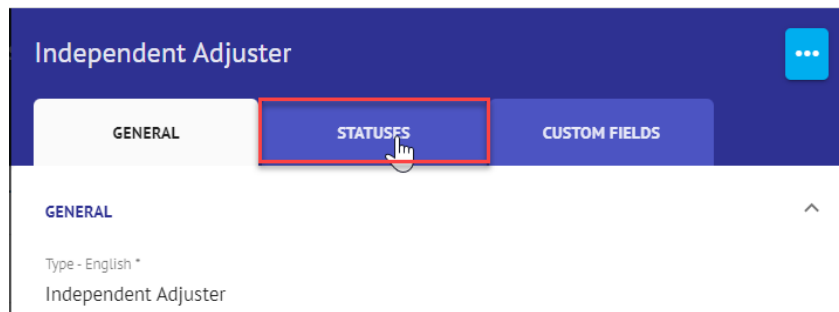
- To set prerequisite/required statuses by individual assignment type, navigate to the **Assignment Types** page from the Claim User menu.



- Select an Assignment from the list of available Assignment Types.

Assignment Types							
↑ Type - English	Type - Français (CA)	Name - English	Name - Français (CA)	Code	Default	Group Assignment - Class	Group Assignment - Group
Desk Adjuster						User	Desk Adjuster
Field Staff					✓	User	Field Staff
Independent Adjuster						Vendor	IA Firm
Mitigation						Vendor	Mitigation Contractor
Reinspection						User	Reinspection
Repair						Vendor	Repair Contractor

9. The **Assignment** blade will open from the right, then select the **Statuses** tab to view all available statuses and prerequisite/required statuses.



The screenshot shows the 'Independent Adjuster' configuration page with the 'STATUSES' tab selected. The table below lists the statuses and their prerequisite/required statuses.

Status	Prerequisite/Required Statuses
<input checked="" type="checkbox"/> Assignment Sent	N/A
<input checked="" type="checkbox"/> Assignment Received	N/A
<input checked="" type="checkbox"/> Insured Contacted	N/A
<input checked="" type="checkbox"/> Inspection Scheduled	None
<input checked="" type="checkbox"/> Inspection Performed	None
<input type="checkbox"/> Mitigation Work Started	None
<input type="checkbox"/> Mitigation Work Completed	None
<input checked="" type="checkbox"/> Estimate Ready for Review	N/A
<input checked="" type="checkbox"/> Estimate Completed	N/A
<input checked="" type="checkbox"/> Estimate Approved	N/A
<input type="checkbox"/> Job Scheduled	None
<input type="checkbox"/> Job Not Sold	None
<input type="checkbox"/> Job Started	None
<input type="checkbox"/> Job Completed	None
<input checked="" type="checkbox"/> Assignment Completed	None
<input checked="" type="checkbox"/> Assignment Cancelled	N/A
<input checked="" type="checkbox"/> Assignment Declined	N/A
<input checked="" type="checkbox"/> Assignment Reopened	N/A

10. Repeat **Steps 5-7** to set Statuses and Prerequisite/Required Statuses as they apply to the Individual Assignment Type.



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