



# Job Aid

## Adjuster License Number Configuration

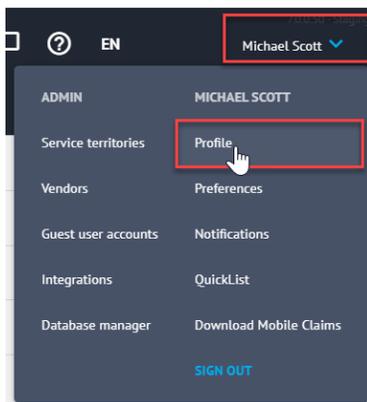
Issue 1  
May 30, 2023

# Adjuster License Number Configuration

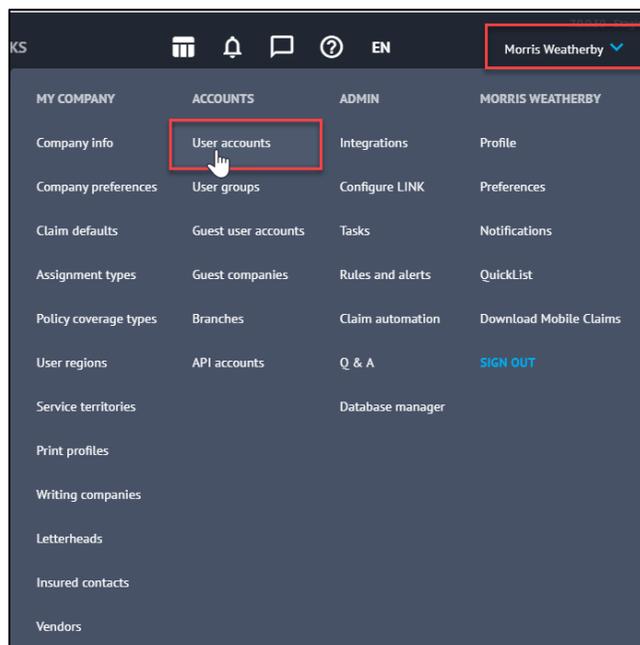
This job aid will guide a Company Administrator or User through the necessary steps to add adjuster license numbers to the user profile in Claims Connect.

**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 add Adjuster License numbers to your profile (as a Standard User), navigate to the User Profile page from the user menu, then proceed to Step 4.



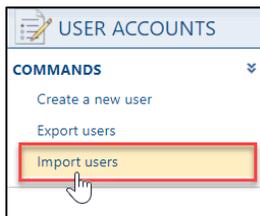
2. To add Adjuster License numbers to a user profile (as a Company Administrator), navigate to the User Accounts page.



3. Select the user from the list.

Username	Last Name	First Name	E-mail	Phone	Status	Us
lfrank_aidins	Frank	Lisa			Enabled	Standa
lmorris_aidins	Weatherby	Morris			Enabled	Admin
mscott_aidins	Scott	Michael			Enabled	Supplie

**Note:** As a Company Administrator, Adjuster License Numbers can also be added to User Profiles utilizing the Import users command and via the API.



4. Select the Licenses tab from the top of the Modify Account window.

The image shows the "MODIFY ACCOUNT" window with the "Licenses" tab selected. The "General" section contains the following fields:

- Username: mscott\_aidins \*
- First name: Michael \*
- Last name: Scott \*
- e-mail: \*
- Phone: \*
- Old password: \*
- New password: \*
- Confirm password: \*
- User group: Supplier Manager (dropdown)
- User role: Adjuster (dropdown)
- User Region: (dropdown)
- User Area: (dropdown)

A password requirement box on the right states: "Your password must be at least 8 characters in length, must not contain your username, first name or last name, and must contain at least one character from 3 of the 4 following groups: upper case letters (A-Z), lower case letters (a-z), numbers (0-9), special characters (!, \$, %, ^, &, etc.)."

5. Select the Province/State and type the license number in the field.

Province/State	License Number
Alabama	
Alaska	
Arizona	AZ-1234ZA
Arkansas	
California	
Colorado	
Connecticut	
Delaware	
District of Columbia	
Florida	
Georgia	
Hawaii	
Idaho	
Illinois	
Indiana	
Iowa	
Kansas	
Kentucky	
Louisiana	
Maine	
Maryland	
Massachusetts	

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**Note:** There is a 15 character limit per License Number field. Letters, numbers and special characters are all accepted. If the User's company is located in Canada, Provinces will display instead of States.

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6. Scroll to view all Provinces/States and add the license numbers as necessary.

Province/State	License Number
Florida	
Georgia	
Hawaii	
Idaho	
Illinois	
Indiana	
Iowa	
Kansas	
Kentucky	123XYZ
Louisiana	
Maine	
Maryland	
Massachusetts	
Michigan	
Minnesota	
Mississippi	
Missouri	
Montana	
Nebraska	
Nevada	
New Hampshire	
New Jersey	
New Mexico	NM0011223344556
New York	
North Carolina	

7. Click Save to save changes or Cancel to discard and leave the User Profile page.

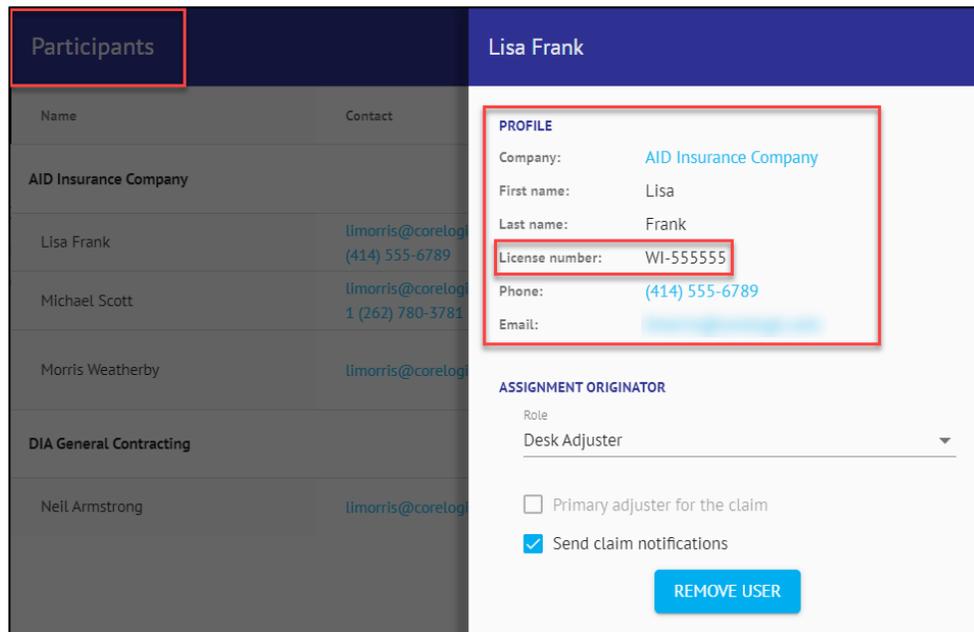
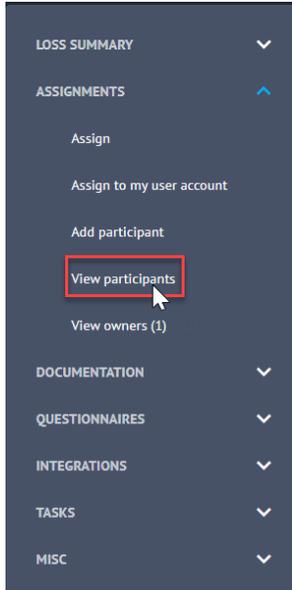
The screenshot shows the 'MODIFY ACCOUNT' interface with the 'Licenses' tab selected. A table lists licenses for Alabama, Alaska, and Arizona (AZ-1234ZA). The 'Save' and 'Cancel' buttons in the top right corner are highlighted with red boxes.

8. To view the Adjuster License number, go to the Loss Summary page of a claim in Claims Connect or Mobile Claims. If the User has a License Number loaded for the state in which the loss location is, the Adjuster License Number will be displayed.

The screenshot displays the 'Loss Summary' page. It includes sections for 'Insured information' (First name: 7.0 Support, Last name: Demo, Address: 5711 Wiltshire Dr., Madison, Wisconsin, 53711) and 'Adjuster information' (Adjuster: Michael Scott (AID Insurance Company), License number: WI-123). The 'Adjuster information' section is highlighted with a red box.

The screenshot shows a detailed claim form. The 'Adjuster' section is highlighted with a red box, showing 'Adjuster: Michael Scott (AID Insuranc...', 'License Number: WI-123', 'Phone:', and 'e-mail:'. Other fields include 'CLAIM NO.: 20230523-0223', 'Policy No.: HO-12345', 'Type of loss: Water Damage', 'Date of loss: 05/22/2023', 'Time of loss: 12:00 AM', 'Deductible: Fixed', 'Year built:', 'CAT No.:', 'Assigned: 05/23/2023 2:24 AM', 'Type: Field Staff', 'To: Michael Scott', 'Business name:', 'Title:', 'First name: 7.0 Assignment', 'Last name: Status', 'Address: 5711 Wiltshire Dr.', 'City: Madison', 'Prov./State: Wisconsin', 'Postal/Zip code: 53711', and 'Home:', 'Business:', 'Mobile:', 'Other:'.

9. If any Participant on the claim has an Adjuster License number loaded for the state that the claim is located in, their License number will display on the Participants blade.





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