

Send Work Assignment

Using the Send Work Assignment form, you can create assignments and send them to adjusters/contractors electronically via XactAnalysis®. You can then track and evaluate the assignments using other tools in XactAnalysis. Prior to sending a real assignment, you may send a test assignment to confirm that the system is functioning properly. You may also send a single assignment to multiple contractors for complex claims.


The screen shots in this document are generic, and your company's interface may vary.

[Add rights](#)

[Access Send Work Assignment](#)

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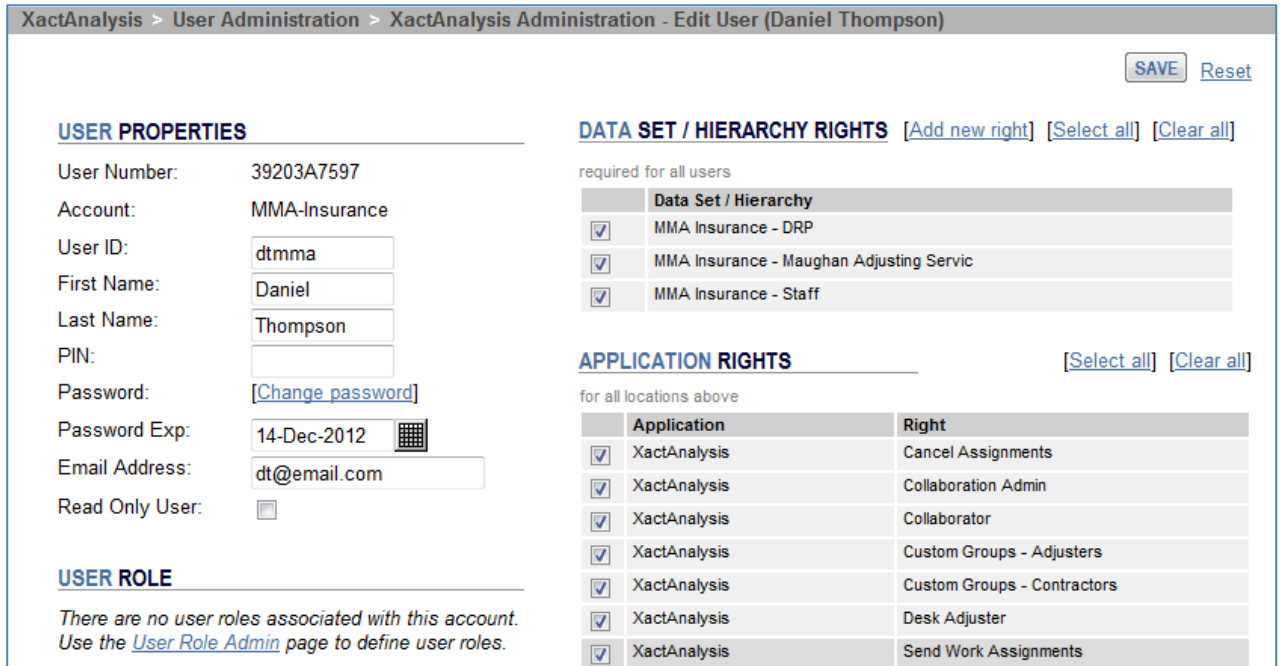
 [Send Work Assignment Training](#) – Watch this video for more information about using Send Work Assignment.

Add rights

To add Send Work Assignments user rights, perform the following steps:

- Go to the user rights page of the individual to whom you want to add rights.
- Under Application Rights, check the box *Send Work Assignments*.
- Click Save at the top of the page (see Figure 1).

Note: For more information about adding rights see [User Administration](#).



XactAnalysis > User Administration > XactAnalysis Administration - Edit User (Daniel Thompson)

[SAVE](#) [Reset](#)

USER PROPERTIES

User Number: 39203A7597
Account: MMA-Insurance
User ID: dtmma
First Name: Daniel
Last Name: Thompson
PIN:
Password: [\[Change password\]](#)
Password Exp: 14-Dec-2012
Email Address: dt@email.com
Read Only User:

DATA SET / HIERARCHY RIGHTS

[\[Add new right\]](#) [\[Select all\]](#) [\[Clear all\]](#)

required for all users

	Data Set / Hierarchy
<input checked="" type="checkbox"/>	MMA Insurance - DRP
<input checked="" type="checkbox"/>	MMA Insurance - Maughan Adjusting Servic
<input checked="" type="checkbox"/>	MMA Insurance - Staff

APPLICATION RIGHTS

[\[Select all\]](#) [\[Clear all\]](#)

for all locations above

	Application	Right
<input checked="" type="checkbox"/>	XactAnalysis	Cancel Assignments
<input checked="" type="checkbox"/>	XactAnalysis	Collaboration Admin
<input checked="" type="checkbox"/>	XactAnalysis	Collaborator
<input checked="" type="checkbox"/>	XactAnalysis	Custom Groups - Adjusters
<input checked="" type="checkbox"/>	XactAnalysis	Custom Groups - Contractors
<input checked="" type="checkbox"/>	XactAnalysis	Desk Adjuster
<input checked="" type="checkbox"/>	XactAnalysis	Send Work Assignments

USER ROLE

*There are no user roles associated with this account.
Use the [User Role Admin](#) page to define user roles.*

Figure 1 – Add Send Work Assignments rights

Access Send Work Assignment

To access Send Work Assignment, click the *Send Work Assignment* icon on the home page, or select *Send Work Assignment* from the Assignments menu (see Figure 2).

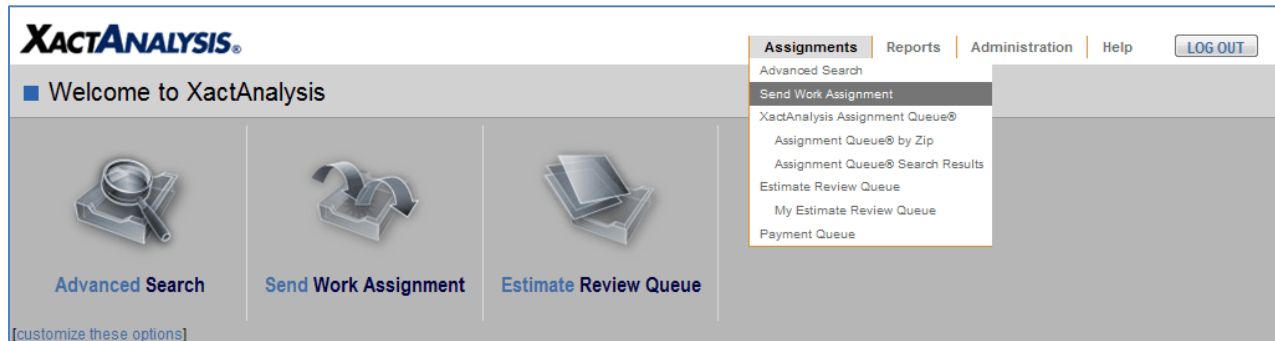


Figure 2 – Access Send Work Assignment

The Send Work Assignment form appears (see Figure 3).

Create and send an assignment

To create and send an assignment, perform the following steps:

- A. Select a data set from the *Data Set* drop-down menu, if available.
- B. Complete the form. Start with the *Property Owner / Risk Information* section, as some data entered here is used to determine what appears in the SmartLists later in the form. For a detailed explanation of the form, see [Send Work Assignment fields and menus](#). Required fields are marked with an asterisk (*) and must be completed before the form can be submitted. To clear the form, select *clear* (at the bottom of the form, to the right of *Submit*) (see Figure 3).

Note: *If you do not assign an adjuster/contractor when completing the form, the assignment goes to the assignment queue and is **not** sent to an adjuster/contractor's Xactimate® account.*

- C. When you have completed the form, click *Submit*. If you miss a required field, the assignment is not submitted. XactAnalysis highlights the field you missed. Update that field and re-click *Submit*.

Note: *Contact your account representative to adjust the available fields and mark certain fields as required.*

PROPERTY OWNER / RISK INFORMATION

Policyholder Name: *

Street: *

City: *

Zip/Postal Code: *

Home Phone:

Business Phone:

Mobile Phone:

Pager:

Select Primary Phone # *

Email Address:

3rd Party Claimant

Name:

Street:

City:

Zip/Postal Code:

Phone:

Risk Location (if different from Property Owner Address)

Street:

City: *

Zip/Postal Code:

Person to Contact to Access Property

Name:

Phone:

CLAIM INFORMATION

Type of Loss: *

Job Type: *

Job Size: *

Claim #: *

CAT Code:

County: *

Contractor: *

Desk Adjuster:

Price List Area: *

Date of Loss: * Time: : Time Zone:

Date Received: * Time: : pm Time Zone:

Description of Loss and/or Instructions:

POLICY INFORMATION

Policy Number: * Inception Date:

Effective Date:

Expiration Date:

[Add Coverage](#)

Apply Deductible: Across All Coverages Coverage Specific Apply Limits: Yes No

Coverage	Type	Policy Limit	Deductible	Apply To	ITV	Reserve	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Clear Delete

Loss Of Use: Amount: Reserve:

[Add Mortgage Holder](#)

Mortgage Holder - If none, so indicate Loan Number: [Delete](#)

Is this a Test Assignment?

[clear](#)

Figure 3 – Send Work Assignment form

- D. After you submit the assignment, a copy of your assignment appears (see Figure 4). If the information is correct, click *Send Assignment*. If there is missing or incorrect information, click *back* to make changes in the Send Work Assignment form.

Data Set: MMA Insurance - Staff

Assignment Type: Structural

PROPERTY OWNER / RISK INFORMATION

Policyholder Name: Mary Inkley	3rd Party Claimant:
Address: 3795 W. Main Street Orem, UT 84062 US	Address: US
Home Phone: (801) 555-3792 - Primary	Phone:
Business Phone:	Risk Location: 3795 W. Main Street Orem, UT 84062 US
Mobile Phone:	Property Access Contact:
Pager:	Phone:
Email Address:	

CLAIM INFORMATION

Type of Loss: Fire (FIRE)	Date of Loss: 08-Jan-2012 11:00 PM
Job Type: General	Date Received: 10-Jan-2012 11:37 AM
Job Size: Small....up to \$3,500.00	
Claim #: FR3297251	
CAT Code:	
County: Utah	
Contractor: George Bartholemew	
Price List Area: Orem	
Desk Adjuster:	

Description of Loss and/or Instructions:

POLICY INFORMATION

Policy Number: 39736462	Inception Date:
	Effective Date: 01-Dec-2011
	Expiration Date: 01-Dec-2012

Apply Deductible: Across All Coverages **Apply Limits:** Yes

Coverage	Type	Policy Limit	Deductible	Apply To	ITV	Reserve
No coverage information is available.						

Special Limits on Personal Property

Name	Single Item	Aggregate

Is this a Test Assignment: No

All times are Mountain Time

[SEND ASSIGNMENT](#) [back](#)

Figure 4 – Data confirmation

After you send the assignment, you are notified that the assignment was sent successfully (see Figure 5).

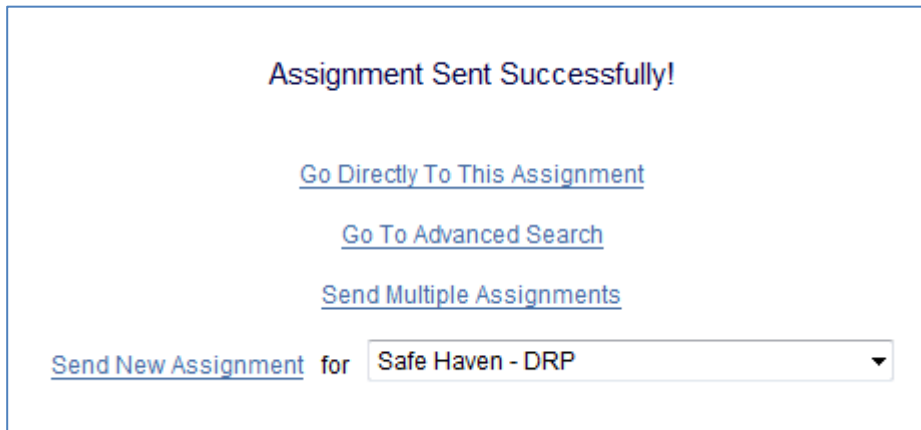


Figure 5 – Assignment Sent Successfully notification

In the *Assignment Sent Successfully* window you may select one of four options:

Go Directly to this Assignment: Select this link to go to the Assignment Detail page of the new assignment.

Go to Advanced Search: Select this link to go to Advanced Search.

Send Multiple Assignments: Select this link to go back to the Send Work Assignment form you just completed so you can send the assignment again as a Multiple Assignment.

Send New Assignment: Select this link to go to a blank Send Work Assignment form.

Send Work Assignment fields and menus

Data Set (Program): Select a data set. Your company may set up and use multiple data sets to manage assignments and estimates.

Property Owner / Risk Information

Policyholder Information: Enter the policyholder's name and address.

Enter the policy holder's phone number(s). Select a radio button to indicate the primary number.

Enter the policy holder's email address.

3rd Party Claimant: Enter the 3rd party claimant's name, address, and phone number.

Risk Location: Enter the risk location address (enter if different from property owner address).

Person to Contact to Access Property: Enter the name and phone number of the person to contact to access the risk location property (enter if different than property owner's name and phone).

Claim Information

Type of Loss: Select a type of loss. The type of loss is the damage-causing event (e.g., earthquake, fire, flood, theft, etc.).

Job Type: Select a job type. The job types listed are customized by your company. Common job types include general, emergency, and mitigation.

Job Size: Select the projected size of the job based on cost.

Claim #: Enter the claim number.

File Number: Enter the file number.

Claim Rep: Enter the name of the claim rep / contractor / adjuster assigned to the assignment.

CAT Code: Enter a catastrophe code if applicable.

Program Location: Select a program location from the SmartList. These options are based on the property owner's zip/postal code (which you entered in the Property Owner / Risk Information section).

Contractor/Adjuster: Select a contractor from the SmartList. This list shows only contractors/adjusters qualified for the selected data set and area, based on the property owner's zip/postal code.

***Note:** If you do not enter a contractor/adjuster for the assignment, the assignment will be sent to the assignment queue and will **not** be sent to a contractor/adjuster's Xactimate account.*

Project Manager: Select a project manager from the SmartList.

Price List Area: Select a Price List Area from the SmartList. The default area is based on the property owner's zip/postal code entered in the Property Owner / Risk Information section.

Date of Loss: Enter the date of loss in mm/dd/yyyy format, or select a date using the calendar button. Enter the time of the loss and select a time zone. You cannot enter or select a future date in this field.

Date Received: Enter the date received in mm/dd/yyyy format, or select a date using the calendar button. Enter the time received and select a time zone. You cannot enter or select a future date in this field.

Appointment Date: Enter the appointment date in mm/dd/yyyy format, or select a date using the calendar button. Enter the appointment time and select a time zone.

Description of Loss and/or Instructions: Enter a description of the loss or special instructions for the contractor/adjuster.

Attachments: To attach a file click Add. The Upload Attachments window appears. Click Browse... to find select the file you would like to attach. Repeat to attach more files. Write a description of the attached file(s) in the Description field and click Upload. When the page refreshes, the file name(s), description(s), type(s), and total size of the attached file(s) appear to the right of the Add and Delete buttons. To delete an attachment, check the box of the file you would like to delete and click Delete.

Policy Information

Policy Type: Select the type of policy (i.e. homeowner or commercial).

Policy Number: Enter the policy number (required).

Effective Date: Enter the date the policy took effect.

Expiration Date: Enter the date the policy expires.

Add coverage: Select to add a line of coverage.

Apply Deductible: Select a radio button to specify how to apply the deductible (i.e. across all coverages or coverage specific).

Apply Limits: Select a radio button to specify whether or not to apply coverage limits.

Coverage table: Enter the name of coverage. Select a type of coverage. Enter the policy limit and deductible. Select what the coverage applies to (R/C, ACV, or both). Enter the ITV and reserve amount. Add more lines of coverage by selecting *Add Coverage* (above). Select *Clear* and *Delete* to clear or delete a line of coverage.

Mortgage Holder: Write the name of the mortgage holder and the loan number. To add another mortgage holder select *Add Mortgage Holder*. If there is no mortgage holder write 'none' in the field. Select *Delete* to delete a mortgage holder line.

Loss of Use: Specify the amount and/or reserve for loss of use.

Is Attention Needed?: If available, check to change the attention status of the assignment.

Is this a Test Assignment?: Check to make this a test assignment. Test assignments are not included in counts and reporting.

Submit: Click to submit the assignment.

Clear: Select to clear the form.