

# PLNAR for CoreLogic/Symbility Claims Connect

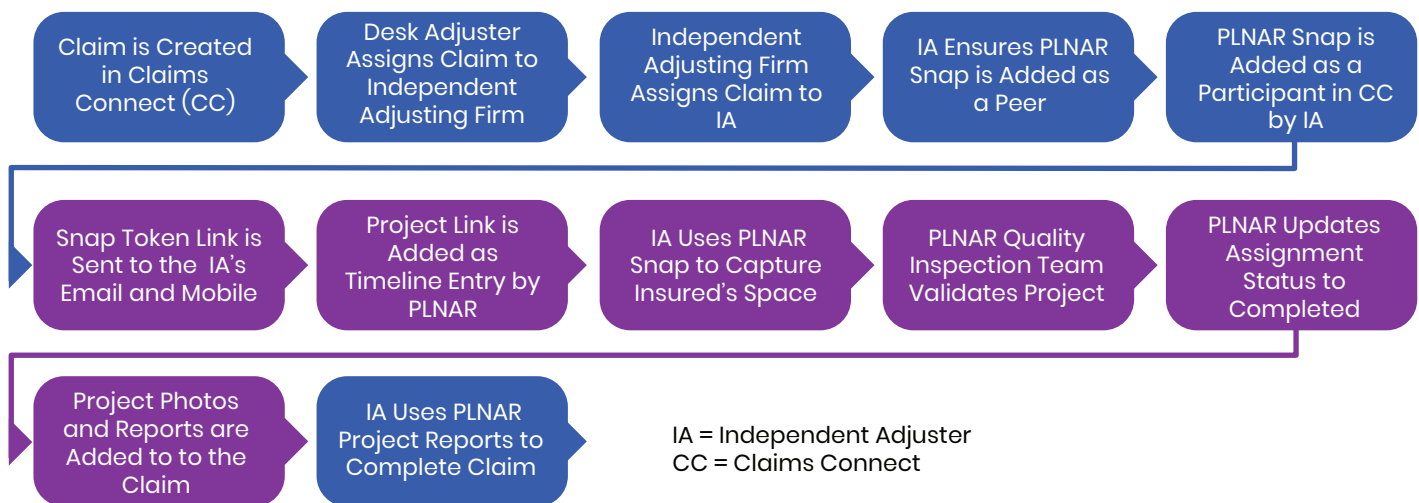
## At-A-Glance Workflows

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**

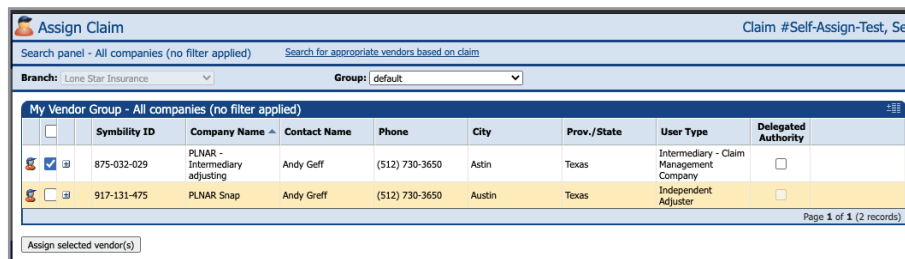
### Workflow 1: Enabling the Independent Adjuster

#### Overview

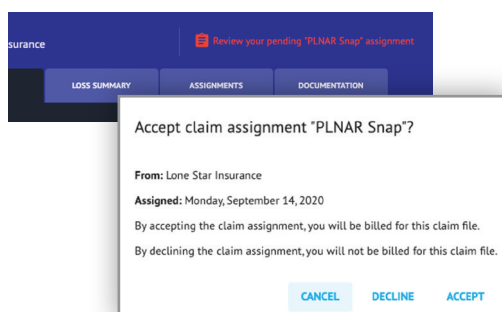


#### Step-by-Step

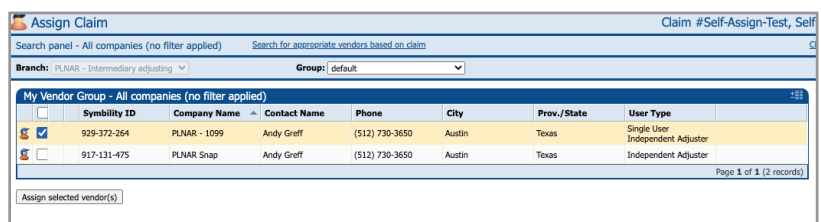
##### STEP 1 Desk Adjuster Assigns Claim to Independent Adjusting Firm



##### STEP 2 IA Firm Accepts Assignment



##### And Assigns to an 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						
	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

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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	
Username:	chris_plnar_1099
First name:	Fred
Last name:	1099guy
e-mail:	fred.109999@mailinator.com
Phone:	+1 (512) 917-5940
Old password:	
New password:	*****
Confirm password:	*****
User group:	Administrator
User role:	Adjuster
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/#/share/project/SNP-317392">https://portal.plnar.co/#/share/project/SNP-317392</a>	...

#### STEP 5

#### Attached Photos

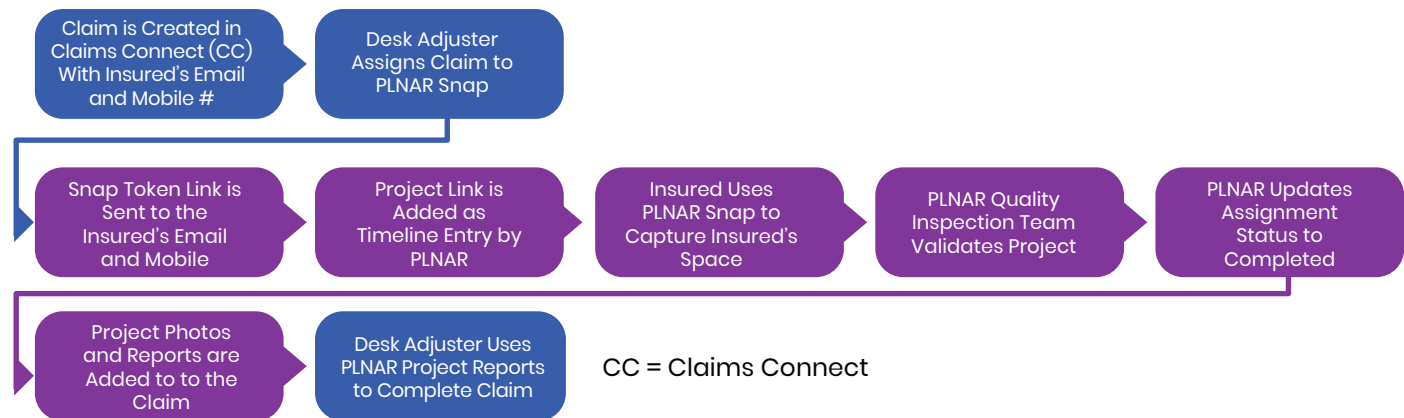
TIMELINE	
PLNAR Photos	ADD PHOTOS DELETE
Photos 34	PLNAR Photos 34
Videos	
Forms	
Documents 6	

#### Attached Documents

TIMELINE	
Documents \ PLNAR Attachments	ADD DOCUMENT SHARE
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

Branch: Lone Star Insurance Group: default

**My Vendor Group - All companies (no filter applied)**

	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"/>

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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