Job Aid

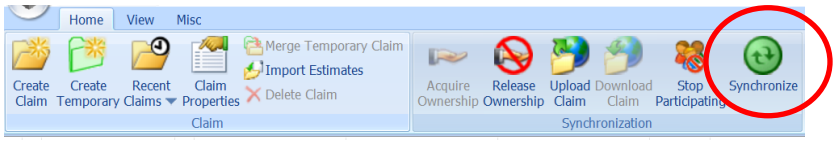
ITEL Integration

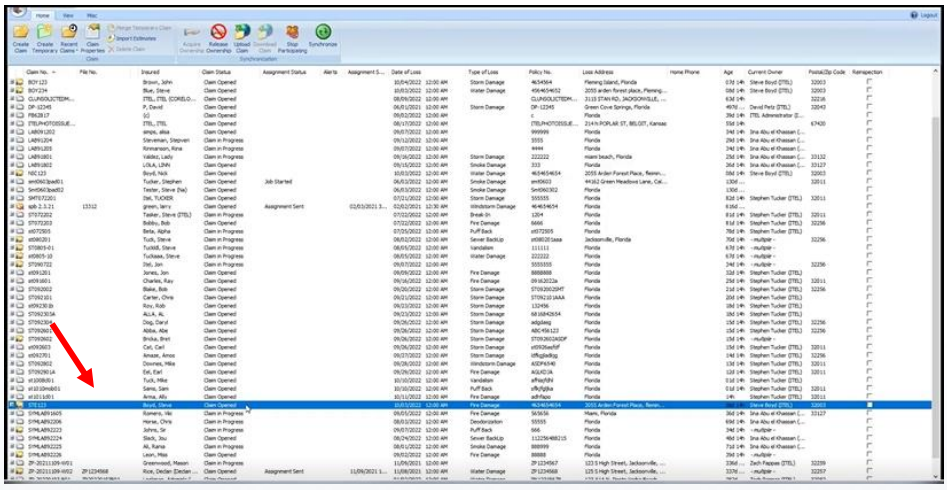
Test Starts Outside Mobile Claims

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

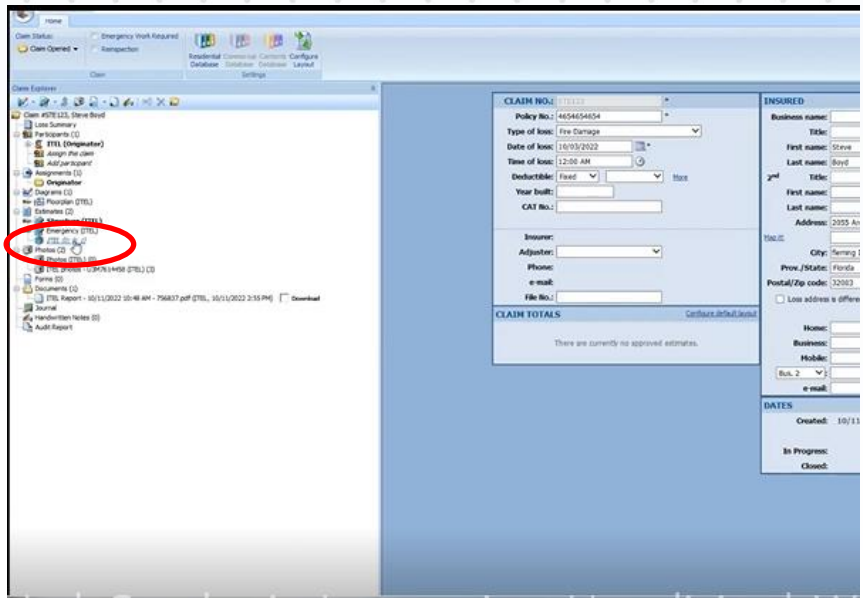
Begin by clicking 'Synchronize' once you have logged into Mobile Claims to view ITEL test results that were started outside of Mobile Claims, either through ITELNow or a Physical Sample Test. Then click on your claim assignment to open the claim from your claim list.





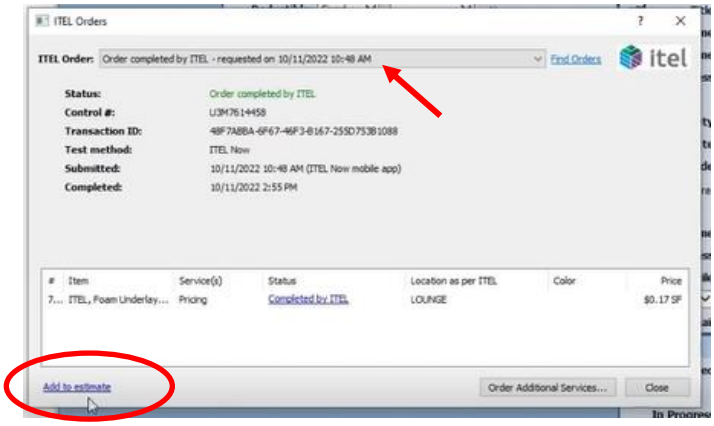
Step 2

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

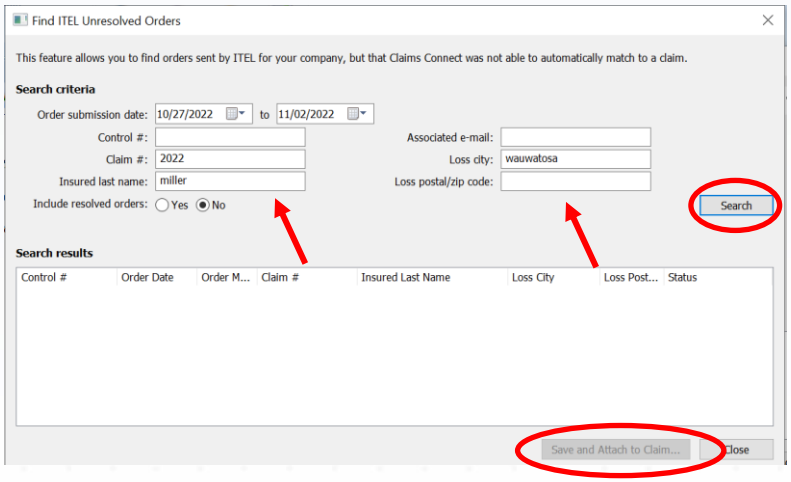


Step 3

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’.



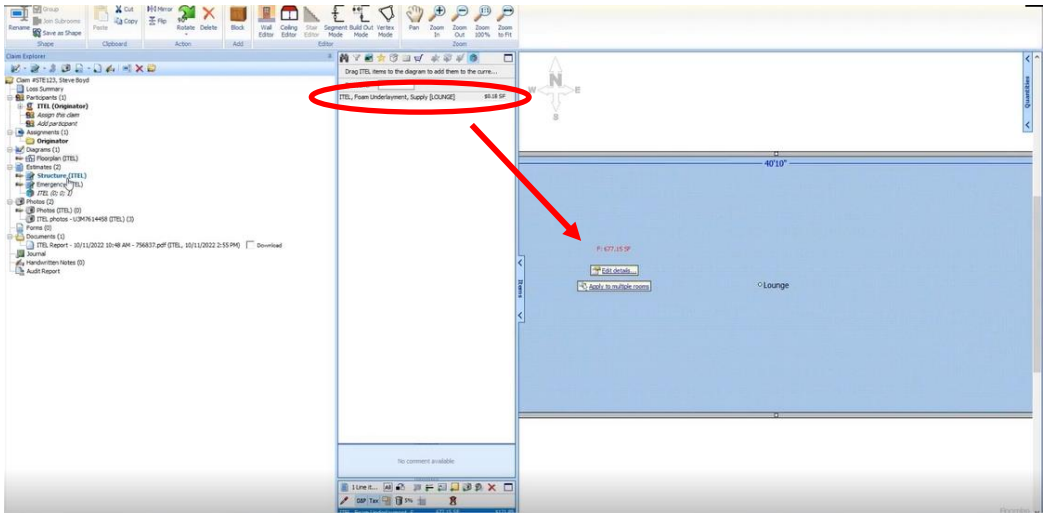
If your search returned the ITEL report that belongs to your claim, you may select it from the Search Results and click the ‘Save and Attach to Claim” button that will enable once a report is selected from the list. The report will then attach to the claim.

Step 4 – Line Item or Assembly Steps

Line Item Steps

Line Item Step

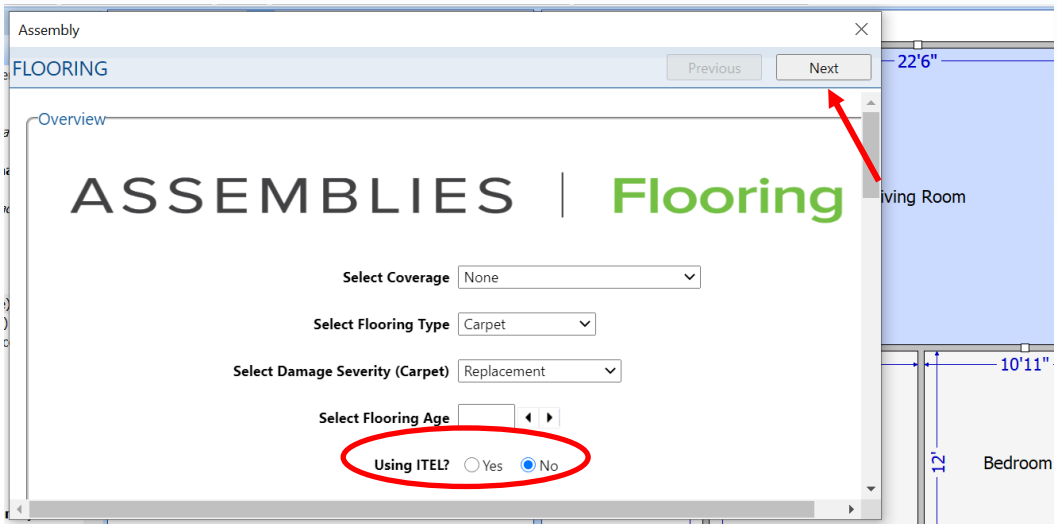
Within the Items blade on a Floorplan, select the ITEL, Supply line item from the database and drag & drop it onto the room(s) of the Floorplan where you wish to apply that line item to the estimate.

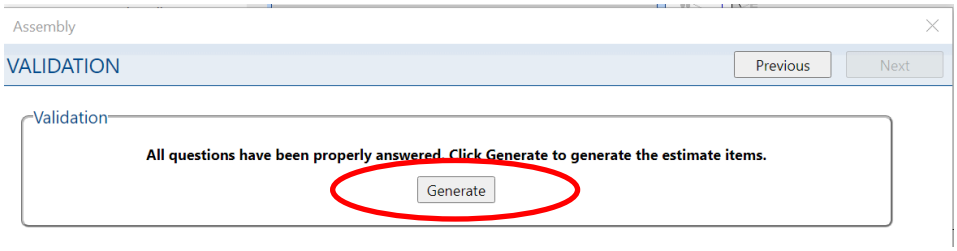


Assembly Steps

Assembly Step A

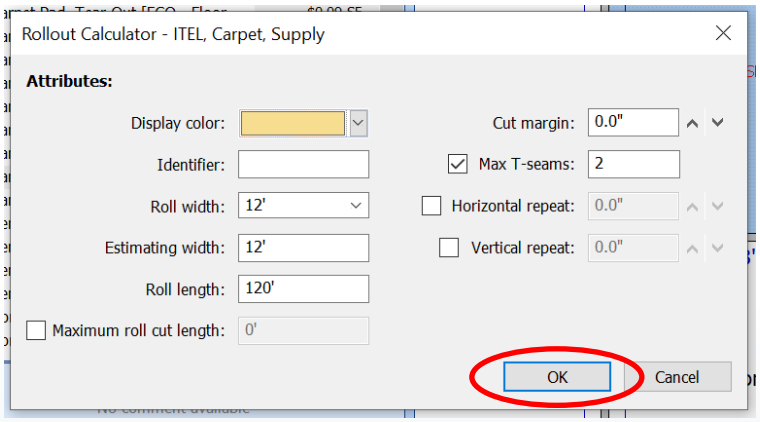
With an Assembly, you will select the Assembly from the list within the 'Items' blade, then drag & drop it to the portion of the diagram you want to apply it to or drop it on the whitespace to apply it to the whole diagram. Fill out the Assembly questionnaire, making sure to click 'Yes' on the 'Using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





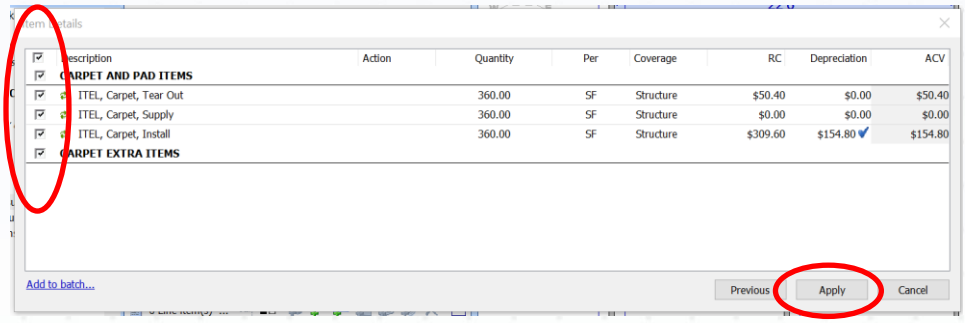
Assembly Step B

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'.



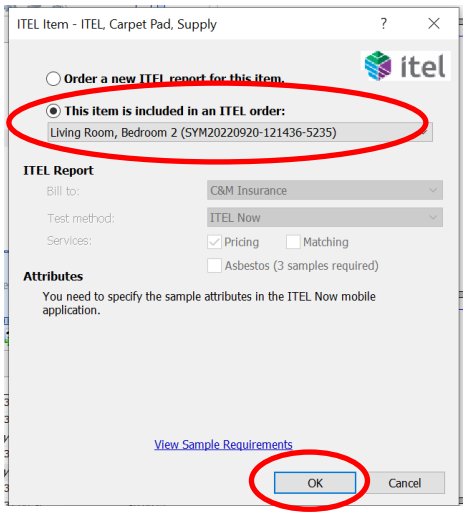
Assembly Step C

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



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.

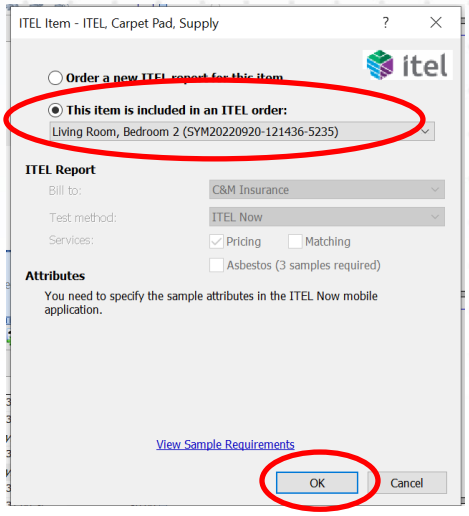


Step 5

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.

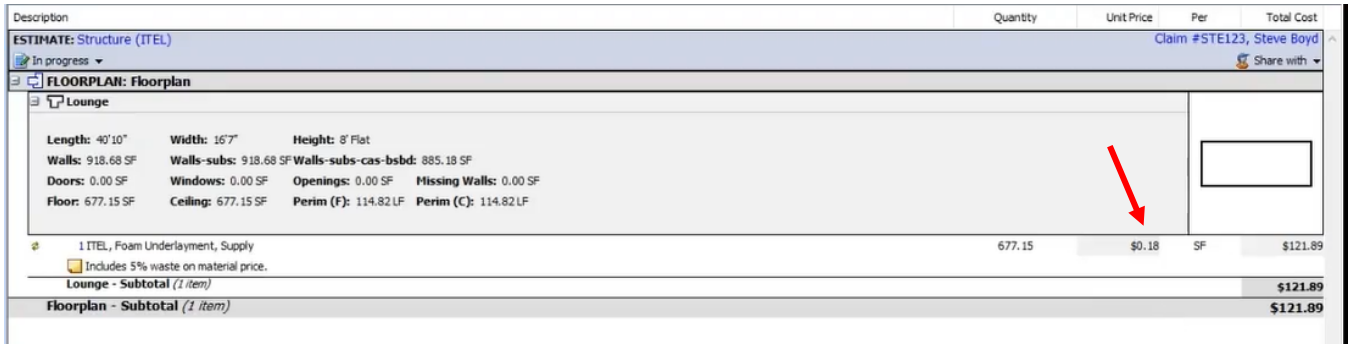
Step 6

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'.



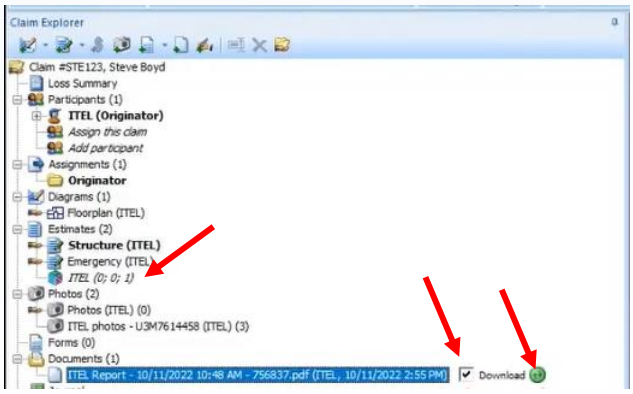
Step 7

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



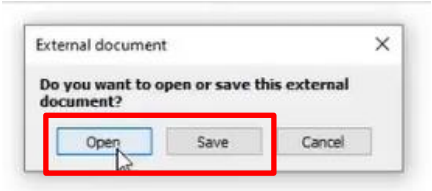
Step 8

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.



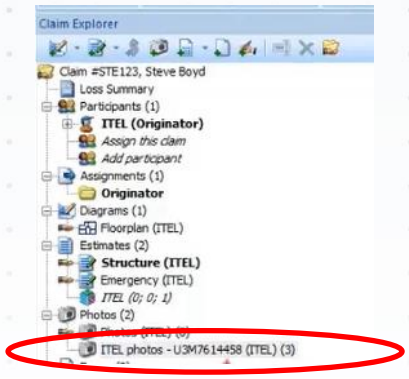
Step 9

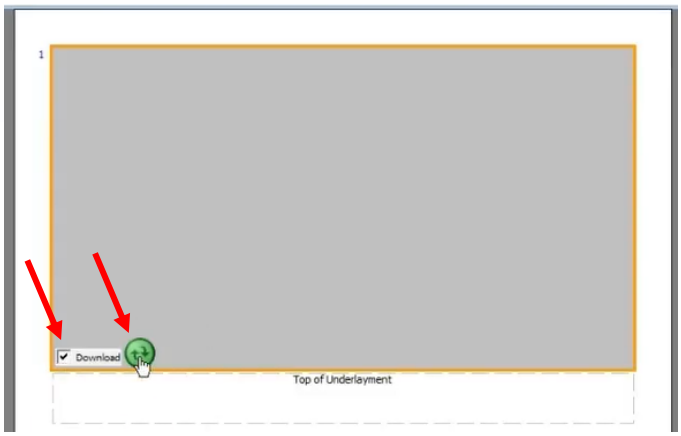
To view the downloaded ITEL report, double click on the report link and click ‘Open’ to view in a PDF reader or click ‘Save’ to save to your desktop files.

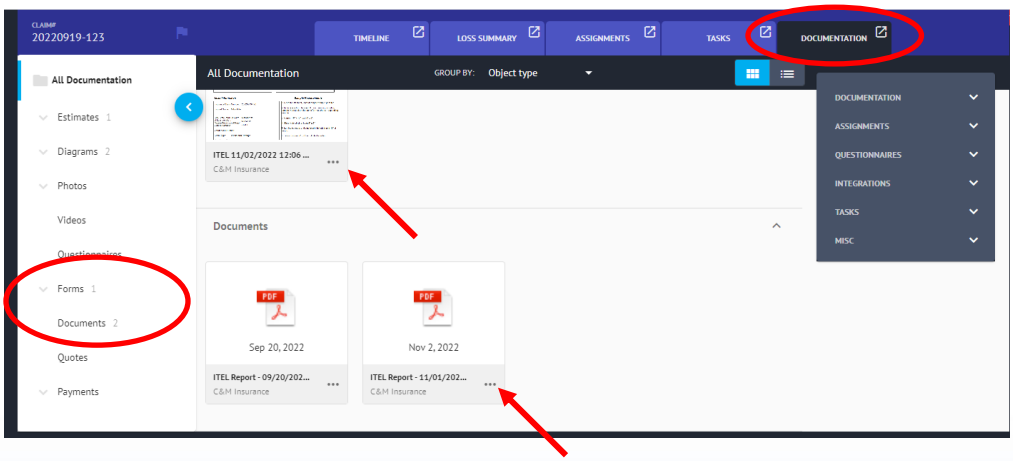


Step 10

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.