



Job Aid

Adjuster License Number Configuration

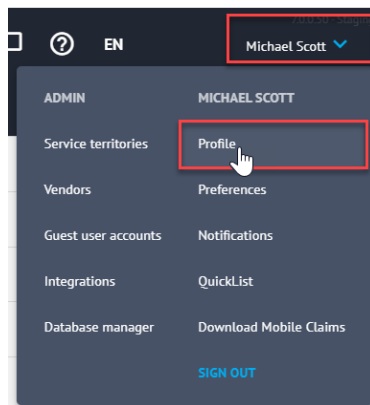
Issue 1
May 30, 2023

Adjuster License Number Configuration

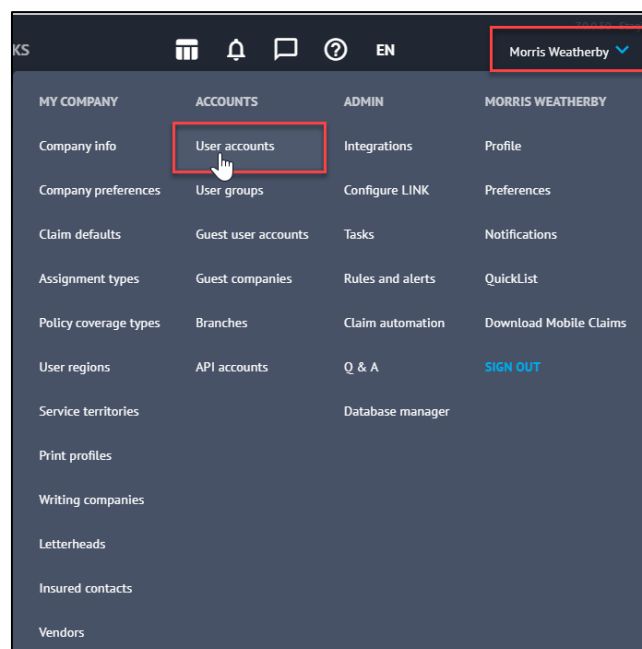
This job aid will guide a Company Administrator or User through the necessary steps to add adjuster license numbers to the user profile in Claims Connect.

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.



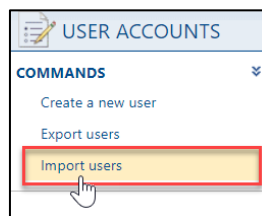
2. To add Adjuster License numbers to a user profile (as a Company Administrator), navigate to the User Accounts page.



3. Select the user from the list.

Search: <input type="text"/> Find <input type="button" value="v"/> Clear							
Username	Last Name	First Name	E-mail	Phone	Status	User	
lfrank_aidins	Frank	Lisa			Enabled	Standa	
lmorris_aidins	Weatherby	Morris			Enabled	Admin	
msscott_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 screenshot shows the 'MODIFY ACCOUNT' window with the 'Licenses' tab selected. The 'General' section is visible, containing fields for Username, First name, Last name, e-mail, Phone, Old password, New password, Confirm password, User group, User role, User Region, and User Area. A password requirement note is displayed on the right.

MODIFY ACCOUNT [Save] [Cancel]

General [Licenses] Assignments Insured Contacts

General

Username: msscott_aidins *

First name: Michael *

Last name: Scott *

e-mail: *

Phone:

Old password:

New password:

Confirm password:

User group: Supplier Manager v

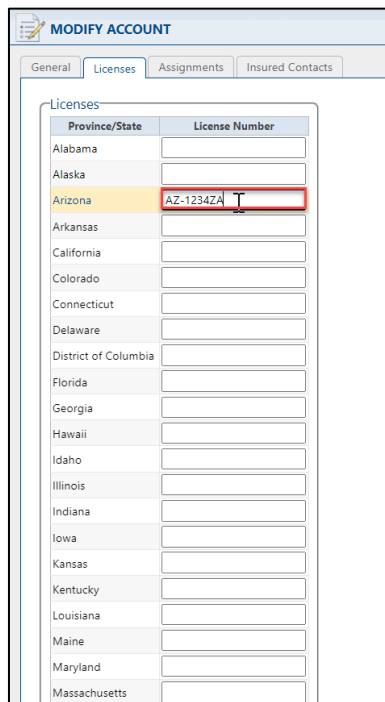
User role: Adjuster v

User Region: v

User Area: v

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.).

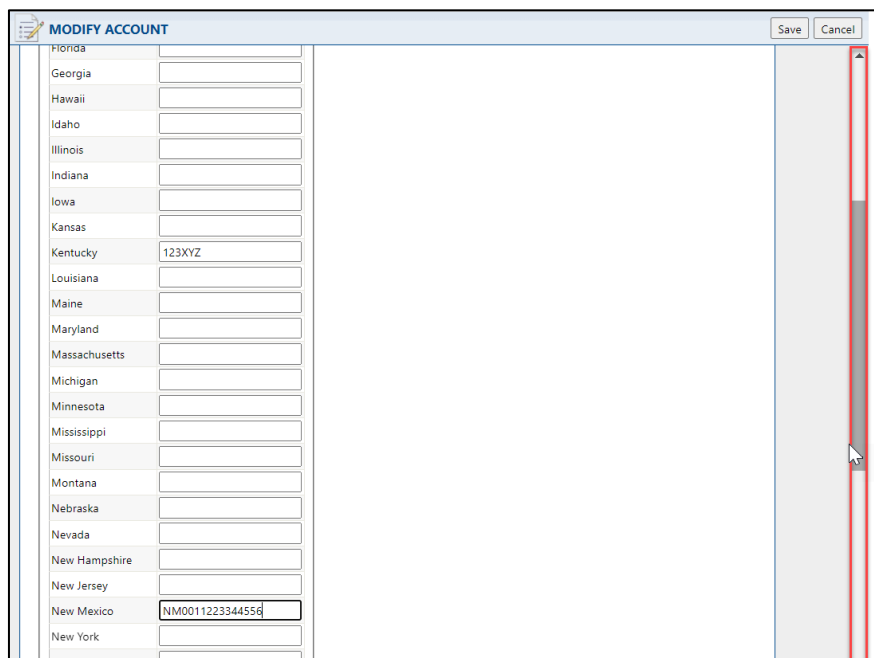
5. Select the Province/State and type the license number in the field.



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	

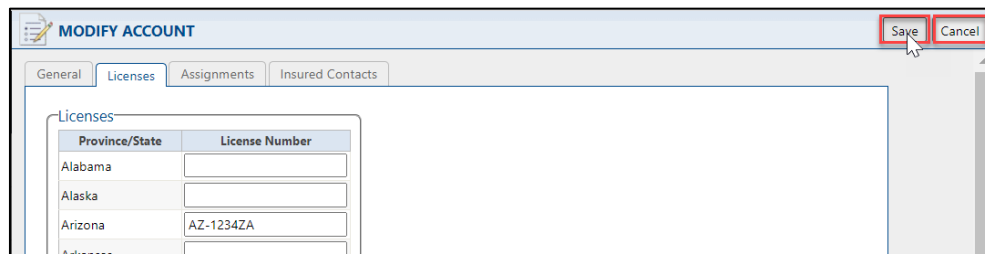
Note: There is a 15 character limit per License Number field. Letters, numbers and special characters are all accepted. If the User's company is located in Canada, Provinces will display instead of States.

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



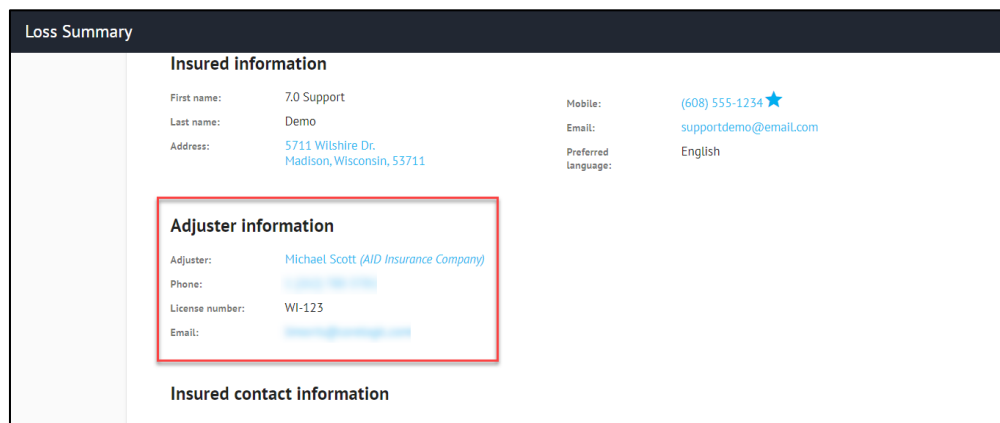
Province/State	License Number
Florida	
Georgia	
Hawaii	
Idaho	
Illinois	
Indiana	
Iowa	
Kansas	
Kentucky	123XYZ
Louisiana	
Maine	
Maryland	
Massachusetts	
Michigan	
Minnesota	
Mississippi	
Missouri	
Montana	
Nebraska	
Nevada	
New Hampshire	
New Jersey	
New Mexico	NM0011223344556
New York	
North Carolina	

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

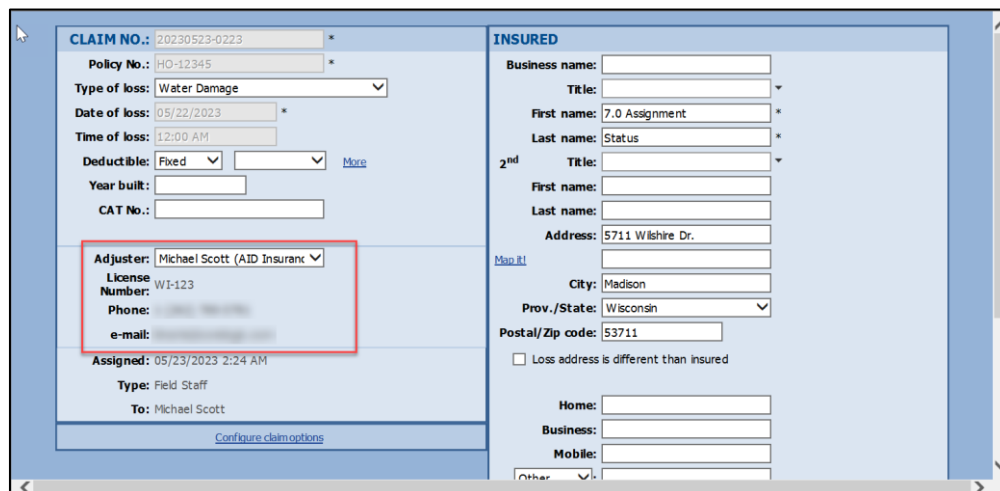


The screenshot shows the 'MODIFY ACCOUNT' page with tabs for General, Licenses, Assignments, and Insured Contacts. The 'Licenses' tab is active, displaying a table with columns 'Province/State' and 'License Number'. The table has three rows: Alabama, Alaska, and Arizona (with license number AZ-1234ZA). A 'Save' button and a 'Cancel' button are located at the top right of the page, with the 'Save' button highlighted by a red box.

- 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.

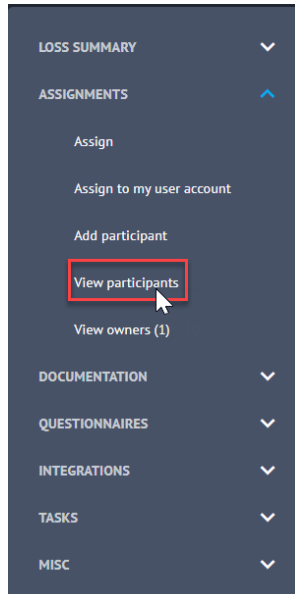


The screenshot shows the 'Loss Summary' page. It has sections for 'Insured information' and 'Adjuster information'. The 'Insured information' section displays: First name: 7.0 Support, Last name: Demo, Address: 5711 Wilshire Dr. Madison, Wisconsin, 53711, Mobile: (608) 555-1234, Email: supportdemo@email.com, Preferred language: English. The 'Adjuster information' section is highlighted with a red box and displays: Adjuster: Michael Scott (AID Insurance Company), Phone: [redacted], License number: WI-123, Email: [redacted]. Below this is the 'Insured contact information' section.



The screenshot shows the 'CLAIM NO.' page. It has sections for 'CLAIM NO.' and 'INSURED'. The 'CLAIM NO.' section displays: 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: [redacted], CAT No.: [redacted], Adjuster: Michael Scott (AID Insurance Company), License Number: WI-123, Phone: [redacted], e-mail: [redacted], Assigned: 05/23/2023 2:24 AM, Type: Field Staff, To: Michael Scott. The 'Adjuster' section is highlighted with a red box. The 'INSURED' section displays: Business name: [redacted], Title: [redacted], First name: 7.0 Assignment, Last name: Status, Title: [redacted], First name: [redacted], Last name: [redacted], Address: 5711 Wilshire Dr., City: Madison, Prov./State: Wisconsin, Postal/Zip code: 53711, Loss address is different than insured: [checkbox], Home: [redacted], Business: [redacted], Mobile: [redacted], Other: [redacted].

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.



The screenshot shows the 'Participants' blade in a software interface. On the left is a table with two columns: 'Name' and 'Contact'. The table lists participants under different company headers: 'AID Insurance Company' (Lisa Frank, Michael Scott, Morris Weatherby) and 'DIA General Contracting' (Neil Armstrong). The 'Contact' column contains email addresses and phone numbers. On the right is a detailed profile for 'Lisa Frank'. The profile includes a 'PROFILE' section with fields for Company (AID Insurance Company), First name (Lisa), Last name (Frank), License number (WI-555555, highlighted with a red rectangle), Phone ((414) 555-6789), and Email. Below this is the 'ASSIGNMENT ORIGINATOR' section, which includes a 'Role' dropdown menu set to 'Desk Adjuster', a checkbox for 'Primary adjuster for the claim' (unchecked), and a checked checkbox for 'Send claim notifications'. At the bottom right of the profile is a blue 'REMOVE USER' button.

Name	Contact
AID Insurance Company	
Lisa Frank	lilmorris@corelogi (414) 555-6789
Michael Scott	lilmorris@corelogi 1 (262) 780-3781
Morris Weatherby	lilmorris@corelogi
DIA General Contracting	
Neil Armstrong	lilmorris@corelogi

Participants

Lisa Frank

PROFILE

Company: AID Insurance Company

First name: Lisa

Last name: Frank

License number: WI-555555

Phone: (414) 555-6789

Email: [REDACTED]

ASSIGNMENT ORIGINATOR

Role: Desk Adjuster

☐ Primary adjuster for the claim

☒ Send claim notifications

REMOVE USER



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