CoreLogic

Job Aid

Minimum Charges Redesign

Issue 1 May 25, 2023

Minimum Charges in Claims Connect

This job aid will guide you through the changes to how minimum charges operate for newly created claims in Claims Connect.

The following tasks are described in this document:

- Enabling the use of, modifying or verifying the Minimum Charge settings at the Claim Level
- Viewing Minimum Charges within an Estimate
- Editing Minimum Charges within an Estimate
- Enabling the use of, modifying or verifying the Minimum Charge settings within a specific estimate
- Printing an Estimate with Minimum Charges

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.

Enabling the use of, modifying or verifying the Minimum Charge settings at the Claim Level

1. Navigate to the Loss Summary Page within a claim.

LOSS TYPE Water Damage	insured John Carter			nator Insurance Company	claim status Claim opened		
	TIMELINE	Ø	LOSS SUMMARY		TASKS		
Loss Summary							
General Information						^	



2. Open the dropdown menu on the right by selecting **Loss Summary**, then click **Options**.

LOSS SUMMARY	^
Edit	
Options	
Change status	
Print	
ASSIGNMENTS	~
DOCUMENTATION	~
QUESTIONNAIRES	~
INTEGRATIONS	~
TASKS	~
міяс	~

3. From the **Options** blade, select the **Estimate Totals** tab, then click **Minimum Charges** to open that section futher.

Q Options		
PRICING	ESTIMATE TOTALS	CLAIM
1 A d d	\bigcirc	
Loss Address		

Q Options	Q Options									
PRICING	ESTIMATE TOTALS	CLAIM								
5711 Wilshire Dr. Fitchburg, Wisconsin, 537	11									
Apply these estim	ate totals options to all exi	sting estimates								
OVERHEAD AND PROFIT										
Overhead: 10% Profit: 1 Non-cumulative	10%		~							
STRUCTURE SALES TAX US Residential - Repair (Avalara) (Homeowner)										
CONTENTS SALES TAX Contents (Contents defau	Same as structure		~							
WASTE Calculate waste by increa	sing QUANTITY		~							
MINIMUM CHARGES	nimum charges		~							
DEPRECIATION	epreciation: 75%		~							

4. Settings will populate based on Company claim defaults. Toggle the switch to turn minimum charges on/off. If on, select from the dropdown how minimum charges should be calculated, and then check the box to apply O&P to minimum charges.



5. If an estimate or estimates already exists in the claim, toggle the switch next to **Apply these estimates totals options to all existing estimates** to do as such. If left untoggled, any updated settings will only apply to newly created estimates within the claim after the adjustments.

Q Options							
PRICING	ESTIMATE TOTALS	CLAIM					
Loss Address 5711 Wilshire Dr. Fitchburg, Wisconsin, 537	11						
Apply these estimate totals options to all existing estimates							

Viewing Minimum Charges within an Estimate

1. Navigate to the **Documentation** tab within the claim.

insured John (, Carter	originato AID Ins	NATOR CLAIM STATUS Insurance Company Claim opened				
	TIMELINE			TASKS			



2. Select the **Estimate** to work on and click to open.

All Documentation		GR	OUP BY: Object type 🗸		 :=
Estimates					^
IN PROGRESS		IN PROGRESS	IN PROGRESS	IN PROGRESS	
\$5,886.52	2	\$2,162.00	\$513.17	\$0.00	P
Primary Suite AID Insurance Company		Bathroom AID Insurance Company	Roof	Contents AID Insurance Company	

3. Ensure that you are on the **Estimate View**.

			tasks 🖸	DOCUMENTATION				
P Bathroom	Status	gress 👻		Estimate	•	б) Еріт	VIEW REPAIR OPTIONS	

4. Scroll to the bottom of the Estimate page to view Minimum Charges that have been automatically added to the estimate due to their association with the line items included.

									~	~~			
All Do	cumentation	1	Bathroom	Status In progress	-				View	imate •	- 🆻 🚺	EDIT VIEW REPAIR	OPTIONS ····
∧ Estin	nates 6	 <td>Description</td><td></td><td>Capacity: 2.0 Volume: 0.0</td><td>0 CY 3 CY</td><td>- 1</td><td>Quantity</td><td>Unit Price</td><td>Per</td><td>RC</td><td>Depreciation</td><td>ACV 🏟</td>	Description		Capacity: 2.0 Volume: 0.0	0 CY 3 CY	- 1	Quantity	Unit Price	Per	RC	Depreciation	ACV 🏟
B	Primary Suite AID Insurance Company		Wells: 208.00 SF Doors: 0.00 SF Floor: 40.00 SF	Walls-subs: 208.00 SF Windows: 0.00 SF Ceiling: 40.00 SF	Walls-subs-cas- Openings: 0.00 Perim (F): 26.0	-babd: 200.42 SF 0 SF 20 LF	Missing w Perim (C)	alls: 0.00 SF : 26.00 LF					
B	Bathroom AID Insurance Company		INSULATION ITE	45									
6	Roof AID Insurance Company		1 Remove - Insulati	on Ceiling Batt Unfaced 12"			-	2.00	\$0.45	SE	\$0.90	\$0.05 🥝	\$0.85
B	Contents AID Insurance Company		3 Bashara Jaculari	en Collina Balk Unford (17				3.00	10.0		64.30	\$0.21 @	
6	Structure DIA General Contracting		2 Replace - Insulati	on, centing, batt, onraced 12				2.00	52.14	ər	\$4.20	30.22	54.07
	Emergency		CEILING COVERIN	IG ITEMS									
8	DIA General Contracting		3 Remove - Drywal	, Celling 5/8", Taped				2.00	\$0.70	SF	\$1.40	\$0.09 🥝	\$1.31
Σ	Claim Totals AID Insurance Company		4 Replace - Drywali	, Celling 5/8', Taped				2.10	\$2.81	SF	\$5.91	\$0.39 🥝	\$5.52
√ Diag	rams 2		Includes 5	6 waste on quantity.									
· ∨ Phot	05												

11 Hucking of Hadding, 1/2 Horr	1	3147.55	LD	\$147.55	30.00	3147.33
 Minimum Charges (4 items) 				\$1,267.94	\$0.00	\$1,267.94
12 Minimum Charge, Insulation	1	\$270.56	LS	\$265.38	\$0.00	\$265.38
13 Minimum Charge, Drywall 2 Trips	1	\$605.72	LS	\$597.15	\$0.00	\$597.15
14 Minimum Charge, Painter	1	\$275.22	LS	\$206.26	\$0.00	\$206.26
15 Minimum Charge, Electrical	1	\$313.74	LS	\$199.15	\$0.00	\$199.15
Subtotal (20 literec)				\$1.612.79	\$52.65	\$1,560,14
(zo nema)					002.00	22,000,24

Note: Minimum Charges now operate like line items in an estimate. Notice that they have line numbers, coverage, quantities and subtotals. Minimum Charges are now included as part of the Estimate Subtotal, as well.

If Minimum Charges have been disabled at the Claim or Estimate leve, the Minimum Charges section will not display at all in Estimate view.

Editing Minimum Charges within an Estimate

1. Click the **Edit** button to enable edit mode for the Estimate.



2. Select the **Check box** next to the Minimum Charge item(s) that need editing.

Minimum Charges (4 items)				\$1,267.94	\$0.00	\$1,267.94
Fm Minimum Charge, Insulation	1	\$270.56	LS	\$265.38	\$0.00	\$265.38
Minimum Charge, Drywall 2 Trips	1	\$605.72	LS	\$597.15	\$0.00	\$597.15
14 Minimum Charge, Painter	1	\$275.22	LS	\$206.26	\$0.00	\$206.26
15 Minimum Charge, Electrical	1	\$313.74	LS	\$199.15	\$0.00	\$199.15

3. Click the **Ellipsis** button in the Edit ribbon to be presented with the option to Disable the selected Minimum Charge(s) by clicking **Enabled**. The check box next to Enabled will be hidden.

× 1 item selec	ed						EDIT	
Q Description	Capacity: 2.00 CV Volume: 0.03 CY	Quantity	Unit Price	Per	RC	Depreciation	✓ Ena	abled

4. To re-enable the Minimum Charge, repeat Steps 3 & 4 by checking the box, navigating to the Ellipsis menu and clicking **Enabled**. The check box next to Enabled will reappear.

×	1 item selected						EDIT ···
Q	Description Capacity: 2.00 CY Volume: 0.03 CY	Quantity	Unit Price	Per	RC	Depreciation	Enabled
10	Replace - Exhaust Fan Good	1.00	\$103.18	EA	\$103.18	\$20.64 🥝	\$82.54
	DEBRIS REMOVAL ITEMS						
11	Trucking & Hauling, 1/2 Ton	1.00	\$147.55	LD	\$147.55	\$0.00	\$147.55
^	Minimum Charges (4 items)				\$670.79	\$0.00	\$670.79
12	Minimum Charge, Insulation	1	\$270.56	LS	\$265.38	\$0.00	\$265.38
	Minimum Charge, Drywall 2 Trips	1	\$605.72	LS	\$597.15	\$0.00	\$597.15
13	Minimum Charge, Painter	1	\$275.22	LS	\$206.26	\$0.00	\$206.26
14	Minimum Charge, Electrical	1	\$313.74	LS	\$199.15	\$0.00	\$199.15

Note: Minimum charges that are enabled and still have a monetary value being added to the claim will display in black font with a line number. Minimum charges that are disabled or have a monetary value equaling zero will display in gray font with no line number.

12 Minimum Charge, Insulation	1	\$270.56	LS	\$265.38	\$0.00	\$265.38
Minimum Charge, Drywall 2 Trips	1	\$605.72	LS	\$597.15	\$0.00	\$597.15

5. Simply click anywhere on a Minimum Charge line item to be presented with the **Item Properties blade**.

Minimum Charges (4 Items)				\$670.79	\$0.00	\$670.79
Minimum Charge, Insulation	1	\$270.56	LS	\$265.38	\$0.00	\$265.38

6. View and modify the Minimum Charge properties such as Depreciation, Coverage, Paid When Incurred, and Taxes/O&P from the **Item Properties blade**.

Minimum Charge, Insulation Item Properties						
< GENERAL	UNIT PRICE	COVERAGE	>			
Item	Action	Grade				
O Minimum Charge, Insulat	ion					
Unit price: \$270.56 per LS						
Quantity:	1.00 LS					
Waste included:	0.00%					
Credit item (appears as ne	egative amount)					
Include subtractions in que	antity calculation					
Apply O&P						
Provisional item						
TAXES						
Name	Mat Lab Equ	M.Cond				
 Apply State Apply County 						

Utilize the arrows on either side of the tabs to view additional Item Properties tabs.



Note: Properties for Minimum Charges can also be edited in-line, as well as in bulk with other items via the multi-select check boxes, then clicking Edit in the Edit ribbon.

^	Minimum Charges (4 items)					\$670
12	Minimum Charge, Insulation	<none></none>	1	\$270.56	LS	\$265
	Minimum Charge, Drywall 2 Trips	Outbuildings	1	\$605.72	LS	\$597
13	Minimum Charge, Painter	Structure	1	\$275.22	LS	\$206
14	Minimum Chargo, Electrical	Structure	1	\$717.74	15	\$100

×	2 items selected						[ерит •••
Q	Description Capacity: 2.00 CY Volume: 0.03 CY	Coverage	Quantity	Unit Price	Per	RC	Depreciation	ACV 🌣
10	Replace - Exhaust Fan Good	Structure	1.00	\$103.18	EA	\$103.18	\$20.64 🥑	\$82.54
	DEBRIS REMOVAL ITEMS							
11	Trucking & Hauling, 1/2 Ton	Structure	1.00	\$147.55	LD	\$147.55	\$0.00	\$147.55
^	Minimum Charges (4 items)					\$1,267.94	\$0.00	\$1,267.94
	Minimum Charge, Insulation	Structure	1	\$270.56	LS	\$265.38	\$0.00	\$265.38
	Minimum Charge, Drywall 2 Trips	Structure	1	\$605.72	LS	\$597.15	\$0.00	\$597.15

Enabling the use of, modifying or verifying the Minimum Charge settings within a specific estimate

1. Within the Estimate View, select the **Ellipsis** button.

1	Bathroom	Status In progress ▼			View	mate 👻	P 🛈 🗖	DIT VIEW REPAIR		
<u>)</u> ्	Description	Capacity: 2.00 CY Volume: 0.03 CY	Coverage	Quantity	Unit Price	Per	RC	Depreciation	ACV	¢



- - 2. From the dropdown menu, click **Edit Options** from within the Estimate section.



3. Select the **Estimate Totals** tab from the Estimate Options blade.

Q Estimate Options									
PRICING	ESTIMATE TOTALS	FINALIZATION							

4. Open the **Minimum Charges** section by clicking anywhere on the dropdown.

Q Estimate Option	s		
PRICING	ESTIMATE TOTALS	FINALIZATION	
OVERHEAD AND PROFIT			
Overhead: 10% Profit: 10 Non-cumulative		~	
STRUCTURE SALES TAX US Residential - Repair (Av State 5% appl County 0.5% appl	valara) (Homeowner) ied to Mat ied to Mat		~
MINIMUM CHARGES Apply adjustments for min	imum charges 炘		~
DEPRECIATION			~



5. Review or modify the Minimum Charges settings for the estimate based on the estimate's needs. Click anywhere outside of the Estimate Options blade to close the blade.

MINIMUM CHARGES	^
Use adjustments for minimum charge	
Calculate up to the total minimum charge	•
Apply O&P to minimum charges	

Note: These settings will override any Claim level settings that were made from the Loss Summary page.

Printing an Estimate with Minimum Charges

1. Within the Estimate view, click the **Ellipsis** button and select **Print** from the Estimate section.

1	Bathroom	Status In progress				Viev	, imate	- P	(i) 🔽	DIT	VIEW REPAIR OPTIONS	
) Q	Description	Capacity: 2.00 CY Volume: 0.03 CY		Coverage	Quantity	Unit Price	Per		RC		ESTIMATE	^
^	Floorplan (16 ite	erns)							\$344.85		Edit options	
^	Bathroom (16 Ite	ems)							\$344.85		Print	
	Length: 8' Walls: 208.00 SF	Width: 5' Walls-subs: 208.00 SF	Height: 8'Flat Walls-subs-cas-bsbd:	200.42 SF							Export to Excel	1
	Doors: 0.00 SF Floor: 40.00 SF	Windows: 0.00 SF Ceiling: 40.00 SF	Openings: 0.00 SF Perim (F): 26.00 LF	Missin Perim	g walls: 0.00 SF (C): 26.00 LF						Delete	

2. The Print to PDF page will open, then check the boxes next to the parts of the claim you wish to print, making sure that Estimate is selected. Select **Generate PDF** to open the PDF version.



3. The Printed version of the Estimate will display the Minimum Charges section, but will hide any disabled OR enabled, but zeroed out Minimum Charges (the ones that appear gray when working on the estimate).

	DEBRIS REMOVAL ITEMS	SURFACE FINISH ITEMS	0							
		5 Texture, Ceiling, Knockdown - Replace	2.00	\$0.63 SF	\$1.26	\$0.25	\$1.01			
		6 Drywall/Plaster Celling - Prime	2.00	7 \$0.67 SF	\$1.34	\$0.56 🖌	\$0.78			
11	Trucking & Hauling 1/2 Top	7 Drywall/Plaster Ceiling - Paint, 1 Coat	40.00	\$0.67 SF	\$26.80	\$11.17 🖌	\$15.63	\$147.55	\$0.00	\$14755
	nocking of houting, it is for	8 Base Molding, 6" & Under - Prime & Paint	26.00	\$1.57 LF	\$40.82	\$17.01 🖌	\$23.81	011100	00100	4211100
		LIGHTING, FANS, ELECTRICAL, AND HVAC ITEM	5	1						
		9 Exhaust Fan Good - Tear Out	1	\$11.41 EA	\$11.41	\$2.28 🖌	\$9.13			
		10 Exhaust Fan Good - Replace)) 1	\$103.18 EA	\$103.18	\$20.64 🖌	\$82.54			
	Minimum Charges (4 Items)	DEBRIS REMOVAL ITEMS	1					\$1,267.94	\$0.00	\$1,267.94
	(Financial ges (Finans)	11 Trucking & Hauling, 1/2 Ton	1	\$147.55 LD	\$147.55	\$0.00	\$147.55	and the second se		Contraction of the
		Bathroom - Subtotal					\$292.20			
10	100 C	Floorplan - Subtotal					\$292.20	4044.90		0010.00
12	Minimum Charge, Insulation							\$205.58	20.00	\$265.58
		Minimum Charges								
		12 Minimum Charge Indulation	1	\$270.56 LS	\$265.38	\$0.00	\$265.33			
13	Minimum Charge, Drywall 2 Trips	13 Minimum Charge, Drywall-2 Trips	1	\$605.72 LS	\$597.15	\$0.00	\$597.15	\$597.15	\$0.00	\$597.15
	This is a set of the s	14 Hinimum Charge, Painter	1	\$275.22 LS	\$206.26	\$0.00	\$206.25			
		15 Minimum Charge, Electrical	1	\$313.74 LS	\$199.15	\$0.00	\$199.15			
333	2010 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Minimum Charges - Subtotal	Minimum Charges - Subtotal \$1,267.9							
14	Minimum Charge, Painter							\$206.26	\$0.00	\$206.26
		Subtotal					\$1,560.14			
15	Minimum Charge Electrical							\$100.15	\$0.00	\$100.15
15	Filminian charge, creculcar							3133.13	30.00	9199.13
	Subtotal (20 Items)							\$1,612.79	\$52.65	\$1,560.14
	and the fact the second	Claim 20230509-0923	Page 4 of	5			05/26/2023		120800022	Sector and a sector



Note: If a claim or estimate has Minimum Charges completely disabled or there are no Minimum Charges applying a monetary amount to the estimate, this section will not appear.

About CoreLogic

CoreLogic is the leading provider of property insights and solutions, promotes a healthy housing market and thriving communities. Through its enhanced property data solutions, services and technologies, CoreLogic enables real estate professionals, financial institutions, insurance carriers, government agencies and other housing market participants to help millions of people find, buy and protect their homes. For more information, please visit corelogic.com.

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