



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.

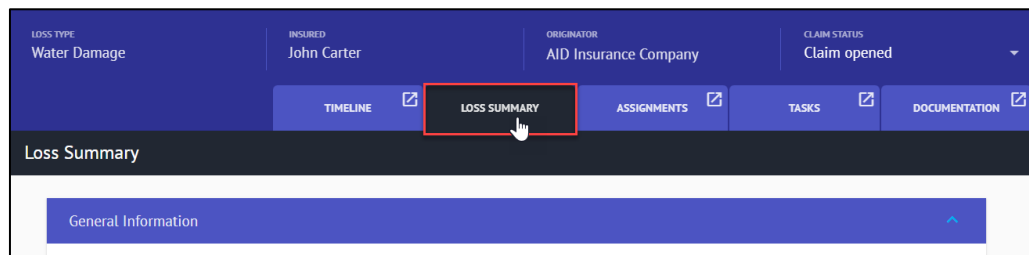
The following tasks are described in this document:

- 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

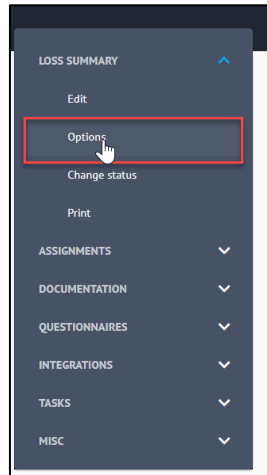
Note: This document was created using a demo insurance company with generic settings. Keep in mind that your screens may appear slightly different. Please refer to your specific carrier guidelines for proper claim and estimate settings.

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

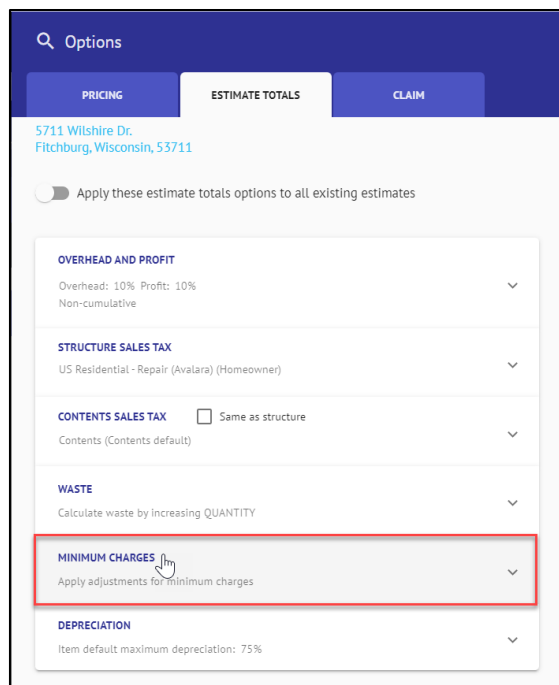
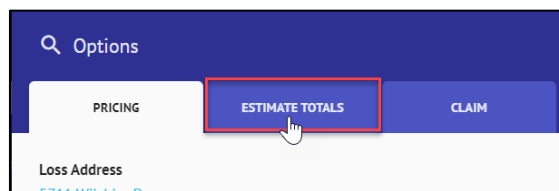
1. Navigate to the **Loss Summary Page** within a claim.



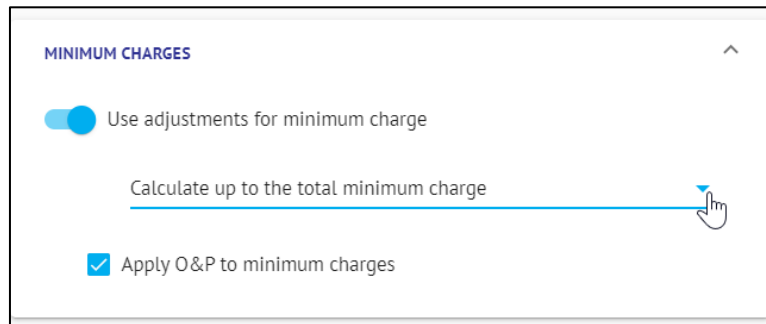
2. Open the dropdown menu on the right by selecting **Loss Summary**, then click **Options**.



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

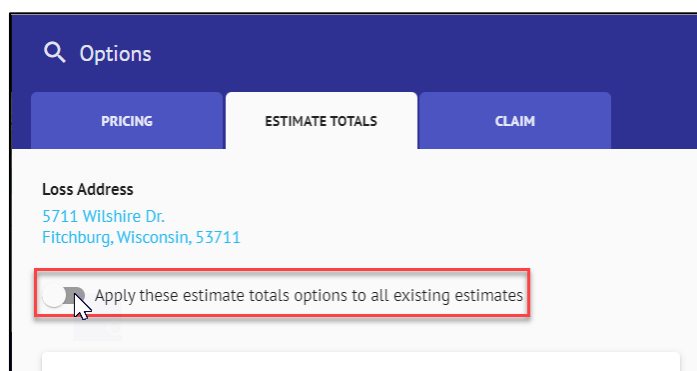


- Settings will populate based on Company claim defaults. Toggle the switch to turn minimum charges on/off. If on, select from the dropdown how minimum charges should be calculated, and then check the box to apply O&P to minimum charges.



The screenshot shows a settings panel titled "MINIMUM CHARGES". It contains a toggle switch labeled "Use adjustments for minimum charge" which is currently turned on. Below this is a dropdown menu labeled "Calculate up to the total minimum charge" with a hand icon pointing to it. At the bottom, there is a checked checkbox labeled "Apply O&P to minimum charges".

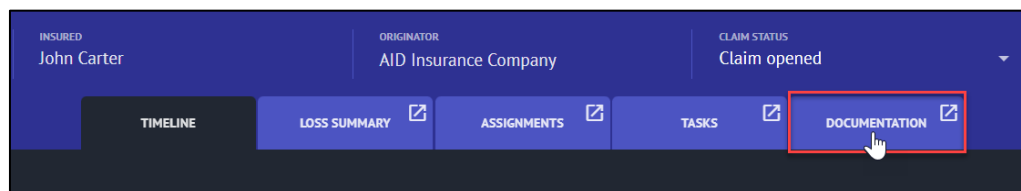
- If an estimate or estimates already exists in the claim, toggle the switch next to **Apply these estimates totals options to all existing estimates** to do as such. If left untoggled, any updated settings will only apply to newly created estimates within the claim after the adjustments.



The screenshot shows the "Options" panel with three tabs: "PRICING", "ESTIMATE TOTALS", and "CLAIM". The "ESTIMATE TOTALS" tab is selected. Under the "Loss Address" section, the address "5711 Wilshire Dr. Fitchburg, Wisconsin, 53711" is displayed. Below the address, there is a toggle switch labeled "Apply these estimate totals options to all existing estimates" which is currently turned off. A red box highlights this toggle switch.

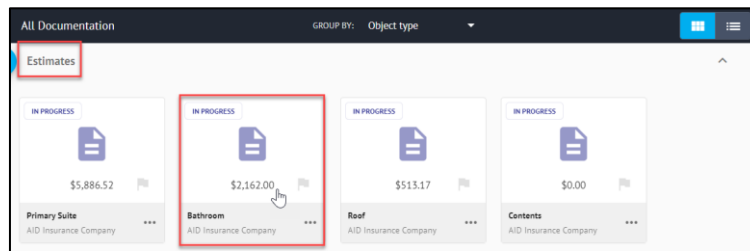
Viewing Minimum Charges within an Estimate

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

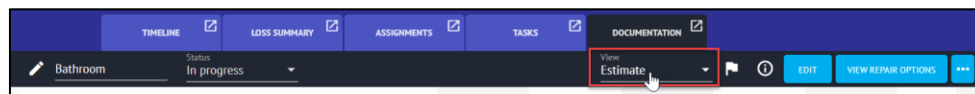


The screenshot shows the claim navigation bar. It includes fields for "INSURED" (John Carter), "ORIGINATOR" (AID Insurance Company), and "CLAIM STATUS" (Claim opened). Below these fields is a row of tabs: "TIMELINE", "LOSS SUMMARY", "ASSIGNMENTS", "TASKS", and "DOCUMENTATION". The "DOCUMENTATION" tab is highlighted with a red box and a hand icon pointing to it.

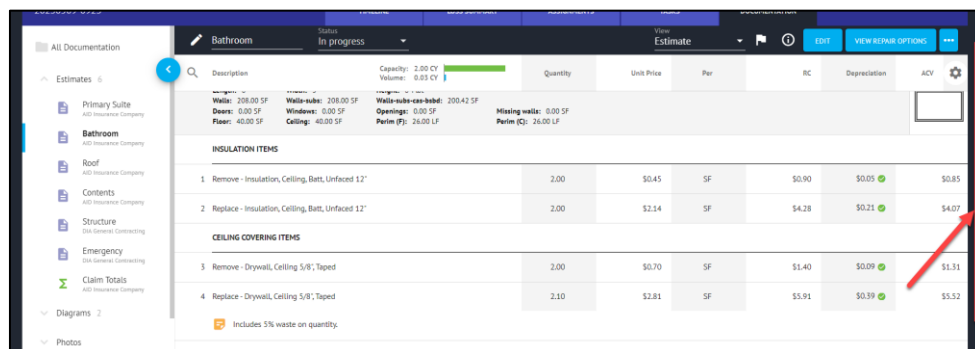
2. Select the **Estimate** to work on and click to open.



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



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.



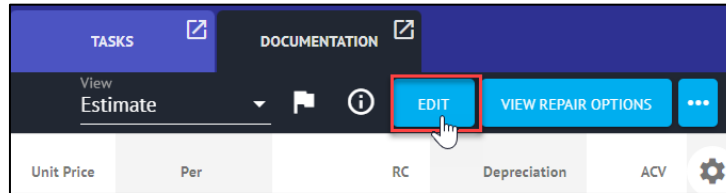
| Minimum Charges (4 Items) | | | | | | |
|---------------------------|---------------------------------|---|----------|----|------------|---------|
| 12 | Minimum Charge, Insulation | 1 | \$270.56 | LS | \$265.38 | \$0.00 |
| 13 | Minimum Charge, Drywall 2 Trips | 1 | \$605.72 | LS | \$597.15 | \$0.00 |
| 14 | Minimum Charge, Painter | 1 | \$275.22 | LS | \$206.26 | \$0.00 |
| 15 | Minimum Charge, Electrical | 1 | \$313.74 | LS | \$199.15 | \$0.00 |
| Subtotal (20 Items) | | | | | \$1,612.79 | \$52.65 |

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 level, the Minimum Charges section will not display at all in Estimate view.

Editing Minimum Charges within an Estimate

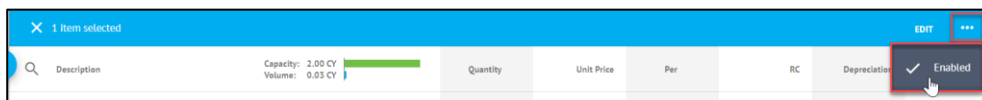
1. Click the **Edit** button to enable edit mode for the Estimate.



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 |
|-------------------------------------|---------------------------------|---|----------|----|------------|--------|------------|
| <input type="checkbox"/> | Minimum Charge, Insulation | 1 | \$270.56 | LS | \$265.38 | \$0.00 | \$265.38 |
| <input checked="" type="checkbox"/> | 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.



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.

| Minimum Charges (4 items) | | | | | \$670.79 | \$0.00 | \$670.79 |
|-------------------------------------|---------------------------------|---|----------|----|----------|--------|----------|
| <input checked="" type="checkbox"/> | 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 |
|---------------------------------|---|----------|----|----------|--------|----------|

- 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 |
|-----------------------------------------------------|---|----------|----|----------|--------|----------|
| <input type="checkbox"/> Minimum Charge, Insulation | 1 | \$270.56 | LS | \$265.38 | \$0.00 | \$265.38 |

- 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

Minimum Charge, Insulation

Unit price:

\$270.56 per LS

Quantity:

1.00 LS

Waste Included:

0.00%

☐ Credit item (appears as negative amount)

☐ Include subtractions in quantity calculation

☒ Apply O&P

☐ Provisional item

TAXES

Name

Mat

Lab

Equ

M.Cond

☒ Apply State

☒

☐

☐

☐

☒ Apply County

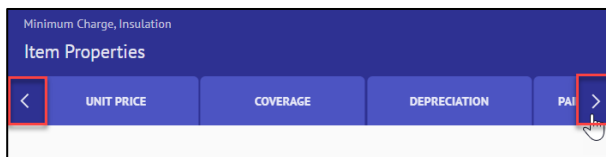
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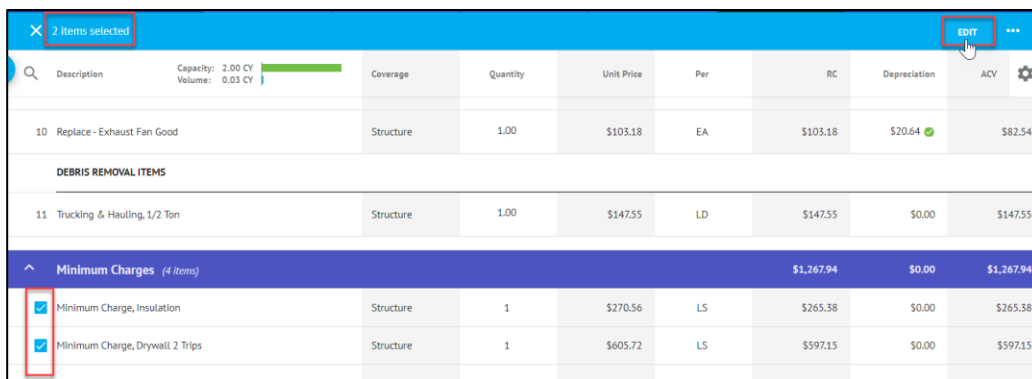
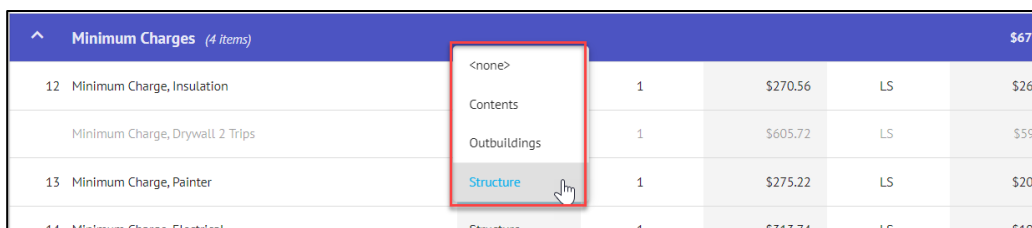
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Utilize the arrows on either side of the tabs to view additional Item Properties tabs.

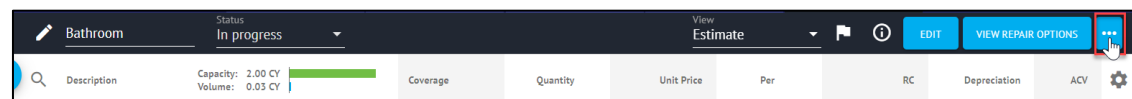


Note: Properties for Minimum Charges can also be edited in-line, as well as in bulk with other items via the multi-select check boxes, then clicking Edit in the Edit ribbon.

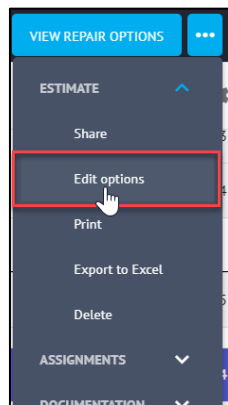


Enabling the use of, modifying or verifying the Minimum Charge settings within a specific estimate

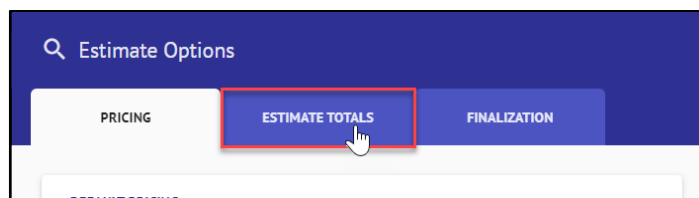
1. Within the Estimate View, select the **Ellipsis** button.



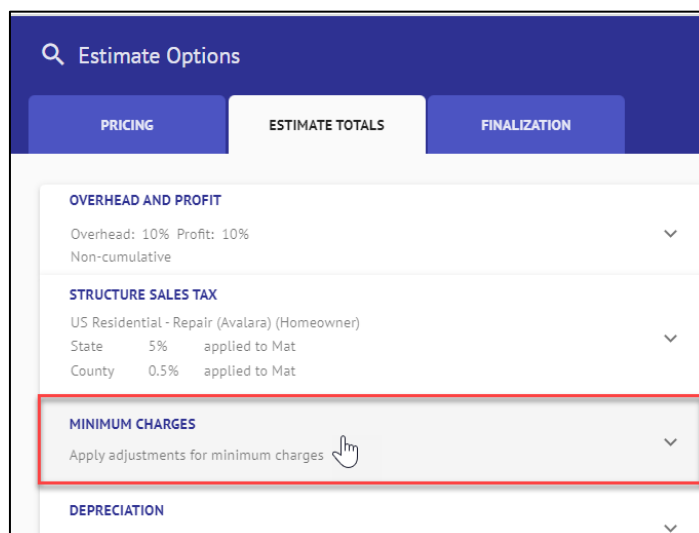
2. From the dropdown menu, click **Edit Options** from within the Estimate section.



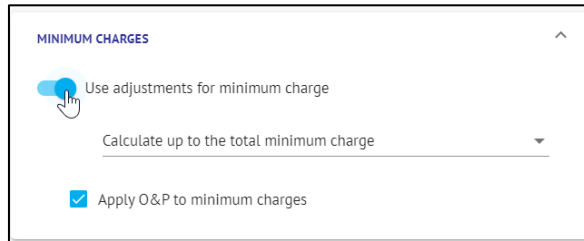
3. Select the **Estimate Totals** tab from the Estimate Options blade.



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



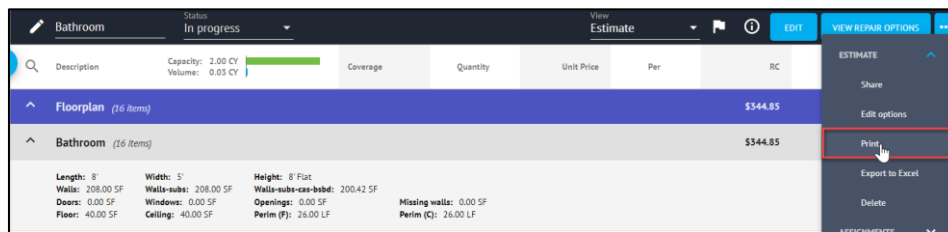
- Review or modify the Minimum Charges settings for the estimate based on the estimate's needs. Click anywhere outside of the Estimate Options blade to close the blade.



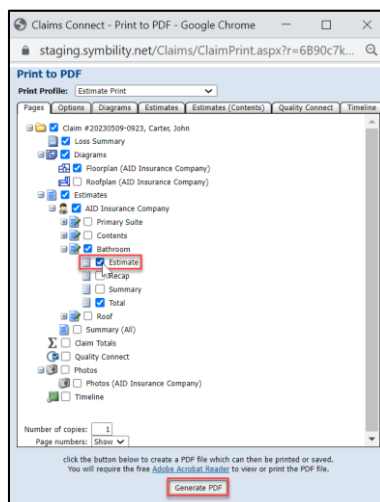
Note: These settings will override any Claim level settings that were made from the Loss Summary page.

Printing an Estimate with Minimum Charges

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



- 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.



- | DEBRIS REMOVAL ITEMS | | SURFACE FINISH ITEMS | | | | | | | | | | |
|--------------------------------------------|---------------------------------|----------------------|------------------------------------------|-------------|----------|------------|----------|---------|--------|------------|---|--------|
| 11 | Trucking & Hauling, 1/2 Ton | 5 | Texture, Ceiling, Knockdown - Replace | 2300 | \$0.43 | SF | \$1.26 | \$0.25 | ✓ | \$1.01 | | |
| | | 6 | Drywall/Plaster Ceiling - Prime | 2700 | | — | \$0.57 | SF | \$1.24 | \$0.56 | ✓ | \$0.78 |
| | | 7 | Drywall/Plaster Ceiling - Paint, 1 Coat | 40.00 | \$0.67 | SF | \$26.80 | \$11.17 | ✓ | \$15.63 | | |
| | | 8 | Base Molding, 4" & Under - Prime & Paint | 26.00 | \$1.57 | LF | \$40.82 | \$17.01 | ✓ | \$23.81 | | |
| LIGHTING, FANS, ELECTRICAL, AND HVAC ITEMS | | | | | | | | | | | | |
| | | 9 | Exhaust Fan Good - Tear Out | 1 | \$11.40 | EA | \$11.41 | \$2.29 | ✓ | \$9.13 | | |
| | | 10 | Exhaust Fan Good - Replace | 1 | \$103.18 | EA | \$103.18 | \$20.64 | ✓ | \$82.54 | | |
| DEBRIS REMOVAL ITEMS | | | | | | | | | | | | |
| | | 11 | Trucking & Hauling, 1/2 Ton | | \$147.55 | LD | \$147.55 | \$0.00 | | \$147.55 | | |
| | | | Bathrooms - Subtotal | | | | | | | \$299.20 | | |
| | | | Floorplan - Subtotal | | | | | | | \$299.20 | | |
| Minimum Charges (4 items) | | | | | | | | | | | | |
| 12 | Minimum Charge, Insulation | 1 | Minimum Charge, Insulation | 1 | \$270.56 | LS | \$270.56 | \$0.00 | | \$270.56 | | |
| 13 | Minimum Charge, Drywall 2 Trips | 1 | Minimum Charge, Drywall 2 Trips | 1 | \$600.73 | LS | \$600.73 | \$0.00 | | \$600.73 | | |
| | | 14 | Minimum Charge, Painter | 1 | \$272.32 | LS | \$272.32 | \$0.00 | | \$272.32 | | |
| 14 | Minimum Charge, Painter | 1 | Minimum Charge, Painter | 1 | \$313.74 | LS | \$313.74 | \$0.00 | | \$313.74 | | |
| | | | Minimum Charges - Subtotal | | | | | | | \$1,267.91 | | |
| 15 | Minimum Charge, Electrical | | Subtotal | | | | | | | \$1,560.14 | | |
| | | | Subtotal (20 items) | | | | | | | \$1,612.79 | | |
| | | Claim 20230509-2023 | | Page 4 of 5 | | 05/26/2023 | | | | | | |

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

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