

CoreLogic®

Job Aid

Vendor Weighted Assignment

Issue 1

September 20th, 2023

Vendor Weighted Assignment in Claims Connect

This job aid will guide company administrators through the steps to configure weighted assignment distribution for vendor groups. The company must have 'Group Assignment Process' Allowed Feature previously enabled by CoreLogic Customer Support.

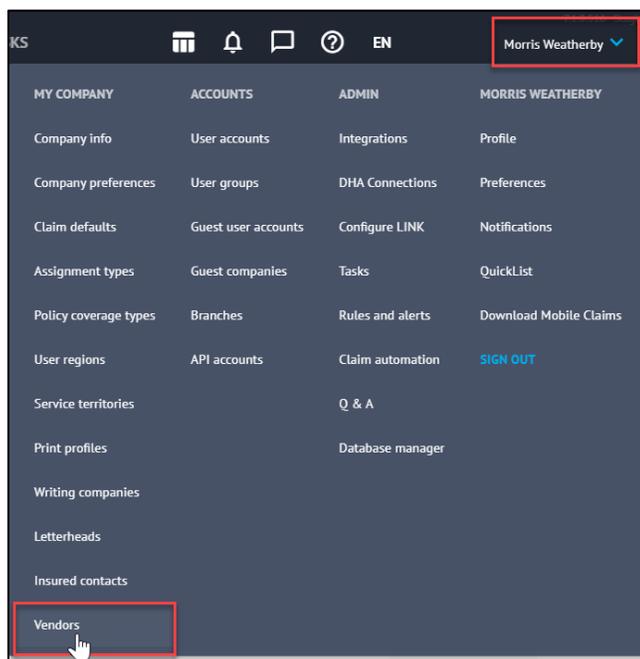
The following tasks are described in this document:

- Establishing the Assignment Distribution type for a Vendor Group
- Setting weighted amounts for Vendors within a Group
- Viewing new columns in Vendor Group list
- Manually resetting the Assignment Counter
- Designating the Weighted Distribution assignment process as default for an Assignment Type

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.

Establishing Assignment Distribution type for a Vendor Group

1. Navigate to the User Menu and select **Vendors**.



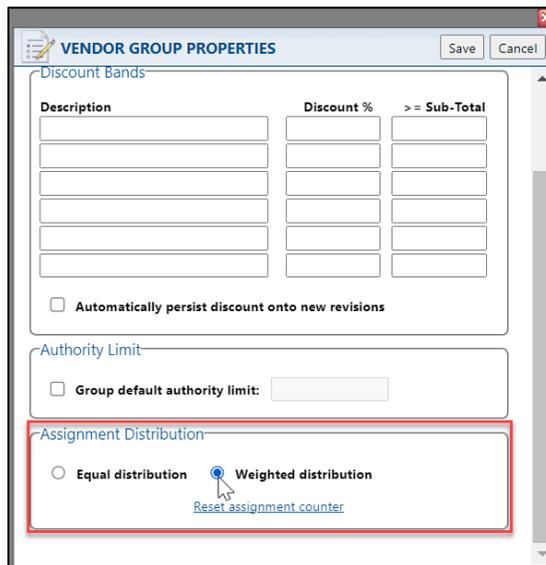
2. Choose the Vendor Group from the **Group** dropdown menu.



3. Click **Properties** to enter that Vendor Group's Properties.



4. Scroll down and select **Weighted distribution** from the Assignment Distribution section.



Note: For all existing Vendor Groups and newly created Vendor Groups, Equal distribution will be selected as the default Assignment Distribution type.

- Click **Save** to save the changes.

VENDOR GROUP PROPERTIES

Discount Bands

Description	Discount %	>= Sub-Total

Automatically persist discount onto new revisions

Authority Limit

Group default authority limit:

Assignment Distribution

Equal distribution Weighted distribution

[Reset assignment counter](#)

Save Cancel

Setting Weighted amounts for Vendors within a Group

- Once Weighted Distribution has been selected as the Assignment Distribution method for a group, navigate to the Vendor list and click on **Options** for the first vendor.

Vendors

Search panel - All companies (no filter applied) Clear

Branch: AID Insurance Company Group: IA Firm New Properties Service Territory Share Delete...

My Vendor Group - All companies (no filter applied)	Symbility ID	Company Name	Contact Name	Phone	City	Prov./State	Type	Options
<input type="checkbox"/>	533-534-210	ICIA Adjusters	[Redacted]	[Redacted]	Buffalo	New York	Intermediary - Independent Adjuster	Options
<input type="checkbox"/>	516-148-848	InterCon Adjusting	[Redacted]	[Redacted]	Dallas	Texas	Intermediary - Independent Adjuster	Options
<input type="checkbox"/>	125-425-590	L&P Adjusting	[Redacted]	[Redacted]	Wauwatosa	Wisconsin	Intermediary - Independent Adjuster	Options

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- Type the desired **Weight** into the text field.

Vendor Options

Company Name: ICIA Adjusters

Delegated Authority

Allow Change Claim Status

Allow Claim Creation

Allow Editing O&P

Visible in LINK*

* Applies when claim originator has LINK enabled

Authority Limit

Use group default

Authority limit:

Override group default

Assignment Distribution

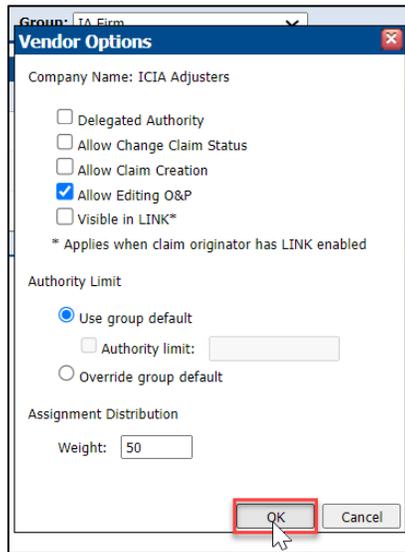
Weight:

OK Cancel

Note: Weight will default to 0. Whole numbers between 0–9999 are accepted in this field. If decimals are used, Claims Connect will round the figure up or down accordingly to the nearest whole number.

This section will not display if Equal distribution is selected as the Assignment Distribution method for a Vendor Group.

3. Click **OK** to save the changes.



Group: IA Firm
Vendor Options

Company Name: ICIA Adjusters

Delegated Authority
 Allow Change Claim Status
 Allow Claim Creation
 Allow Editing O&P
 Visible in LINK*

* Applies when claim originator has LINK enabled

Authority Limit

Use group default
 Authority limit:
 Override group default

Assignment Distribution

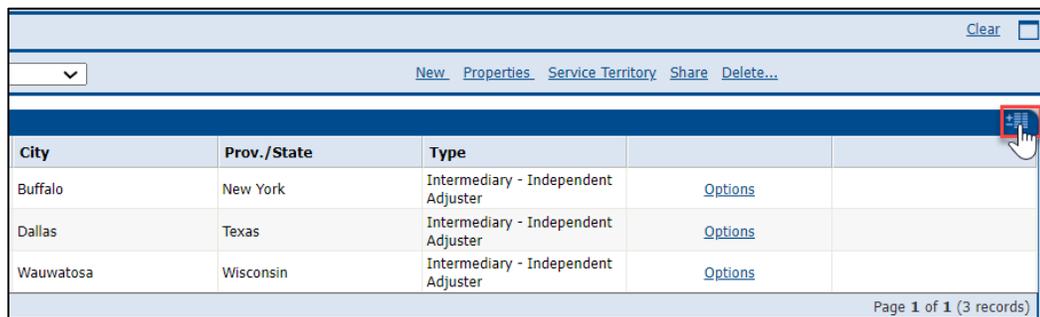
Weight:

4. Repeat Steps 1–3 in this section until all Vendors in the group have been assigned a weight.

Note: Vendor configuration can also be updated via the Import vendor configuration link in the Commands. Weight has been added as a column to the Vendor Group tab of the Vendor Configuration Template in Excel.

Viewing new columns in the Vendor Group list

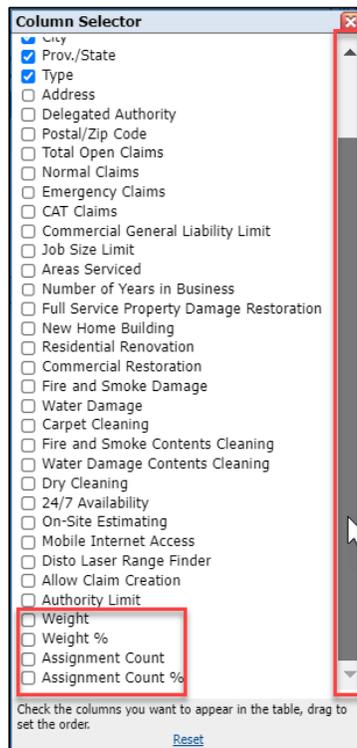
1. Within the Vendor Group list, navigate to the **Column Selector** button and click.



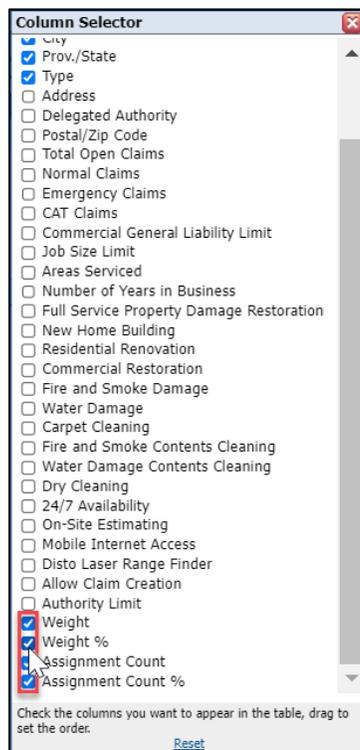
City	Prov./State	Type	Options
Buffalo	New York	Intermediary - Independent Adjuster	Options
Dallas	Texas	Intermediary - Independent Adjuster	Options
Wauwatosa	Wisconsin	Intermediary - Independent Adjuster	Options

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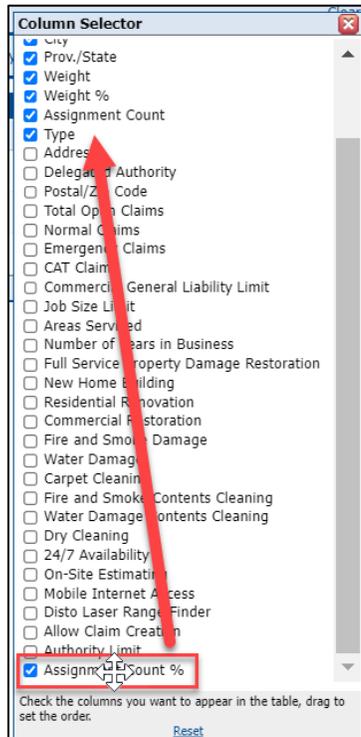
2. Scroll down to view the new column options.



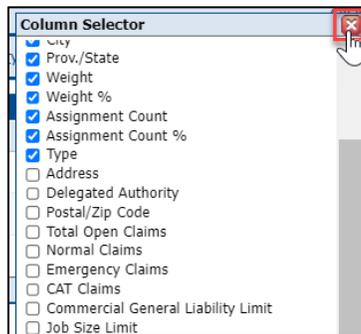
3. Check the box next to the column name to activate that column.



- With the directional cursor, drag & drop the column into the desired order of appearance.



- Click the red X to exit the Column Selector screen.



- The newly added columns will now be visible in the table.

My Vendor Group - All companies (no filter applied)												
<input type="checkbox"/>	Symbility ID	Company Name	Contact Name	Phone	City	Prov./State	Weight	Weight %	Assignment Count	Assignment Count %	Type	
<input type="checkbox"/>	539-534-210	ICIA Adjusters	Craig Batten	(555) 555-5555	Buffalo	New York	50	43.48%	0	0.00%	Intermediary - Independent Adjuster	Options
<input type="checkbox"/>	516-148-848	InterCon Adjusting	Craig Batten	(519) 589-9735	Dallas	Texas	45	38.13%	0	0.00%	Intermediary - Independent Adjuster	Options
<input type="checkbox"/>	125-425-590	LAP Adjusting	Linda Morrison	(414) 555-9876	Wauwatosa	Wisconsin	20	17.39%	0	0.00%	Intermediary - Independent Adjuster	Options

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Note: When Equal distribution is the selected distribution method, the Weight column will display N/A as the values and the Weight % will equally distribute percentages based on the number of active vendors in the group.

If a company's status is switched to 'Inactive' from the Vendor Properties in their Vendor Profile, the new columns will display Inactive for that vendor and the Weight % will redistribute accordingly amongst the remaining active vendors in the group.

My Vendor Group - All companies (no filter applied)												
<input type="checkbox"/>	Symbility ID	Company Name	Contact Name	Phone	City	Prov./State	Weight	Weight %	Assignment Count	Assignment Count %	Type	
<input type="checkbox"/>	533-534-210	ICIA Adjusters			Buffalo	New York	N/A	33.33%	0	0.00%	Intermediary - Independent Adjuster	Options
<input type="checkbox"/>	516-148-848	InterCon Adjusting			Dallas	Texas	N/A	33.33%	0	0.00%	Intermediary - Independent Adjuster	Options
<input type="checkbox"/>	125-425-590	L&P Adjusting			Wauwatosa	Wisconsin	N/A	33.33%	0	0.00%	Intermediary - Independent Adjuster	Options

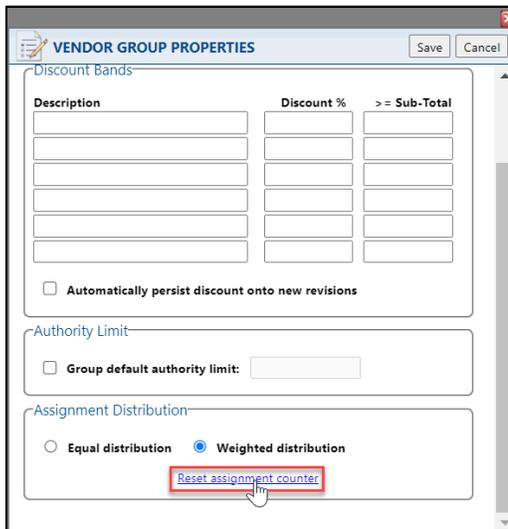
My Vendor Group - All companies (no filter applied)												
<input type="checkbox"/>	Symbility ID	Company Name	Contact Name	Phone	City	Prov./State	Weight	Weight %	Assignment Count	Assignment Count %	Type	
<input type="checkbox"/>	533-534-210	ICIA Adjusters			Buffalo	New York	50	52.63%	0	0.00%	Intermediary - Independent Adjuster	Options
<input type="checkbox"/>	516-148-848	InterCon Adjusting			Dallas	Texas	45	47.37%	0	0.00%	Intermediary - Independent Adjuster	Options
<input type="checkbox"/>	125-425-590	L&P Adjusting			Wauwatosa	Wisconsin	Inactive	Inactive	Inactive	Inactive	Intermediary - Independent Adjuster	Options

Manually Resetting the Assignment Counter

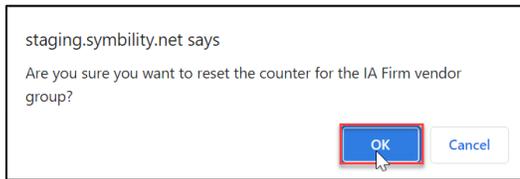
1. On the Vendors screen within the desired Group, click **Properties**.



2. Scroll down to the Assignment Distribution section, and click the **Reset assignment counter** link.



3. Select **OK** from the confirmation dialog box.



4. The Assignment Count and Assignment Count % columns will now display '0' values.

My Vendor Group - All companies (no filter applied)	Symbility ID	Company Name	Contact Name	Phone	City	Prov./State	Weight	Weight %	Assignment Count	Assignment Count %	Type	
	533-534-210	ICIA Adjusters	Craig Batten	(555) 555-5555	Buffalo	New York	50	43.48%	0	0.00%	Intermediary - Independent Adjuster	Options
	516-148-848	InterCon Adjusting	Craig Batten	(519) 589-9735	Dallas	Texas	45	39.13%	0	0.00%	Intermediary - Independent Adjuster	Options
	125-025-590	L&P Adjusting	Linda Morrison	(414) 555-9876	Wauwatosa	Wisconsin	20	17.39%	0	0.00%	Intermediary - Independent Adjuster	Options

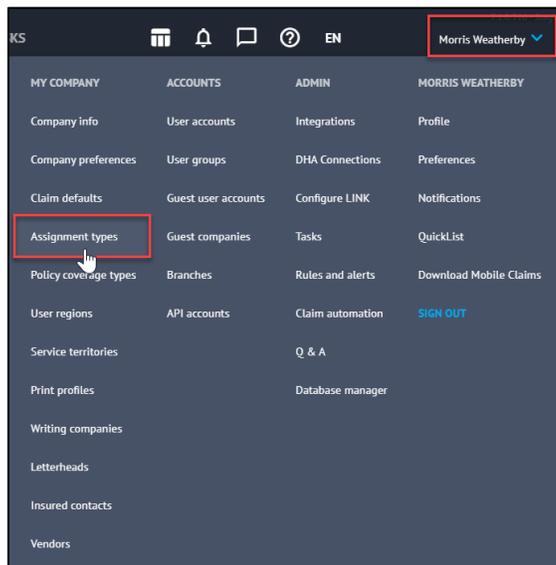
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Note: The Assignment Counter will automatically reset after any of the following events:

- A new company added to the Vendor Group
- An existing company removed from the Vendor Group
- Assignment Distribution mode changed for the Vendor Group
- Vendor weight value updated for one or multiple vendors in the Group
- Vendor inactivation or reactivation by a Company Admin in the Vendor Profile
- Vendor inactivation or reactivation by a CoreLogic account manager

Designating the Weighted Distribution assignment process as default for an Assignment Type

1. Navigate to **Assignment types** from the User Menu and click.



2. Select the Assignment type to update.

Assignment Types							CREATE ASSIGNMENT TYPE
Type - English	Type - Français (CA)	Name - English	Name - Français (CA)	Code	Default	Group Assignment - Class	Group Assignm
Desk Adjuster	Expert en sinistres					User	Desk Adjuster ***
Field Staff	Personnel sur le terrain				✓	User	Field Staff ***
Independent Adjuster	Expert en sinistres indépendant					Vendor	IA Firm ***
Mitigation	Atténuation					Vendor	Mitigation Co ***
Reinspection	Reinspection					User	Reinspection ***
Repair	Réparation					Vendor	Repair Contra ***

Note: Assignment type must be Vendor in the Group Assignment – Class column.

3. The Assignment blade will open from the right. On the **General** tab, scroll down to the collapsed Group Assignment Process pane.

Independent Adjuster

GENERAL STATERIES CUSTOM FIELDS

Default notes

Default class: Vendor User

Default group: IA Firm

Only applies to the API and the group assignment process.

- Set as default assignment type
- Set assignee as insured contact
- Prevent external assignees from adding estimates
- Prevent external assignees from sub-assigning
- Prevent assignees from setting estimate as completed
- Prevent assignees from using another pricing database
- Allow Next Gear Auditing Tools
- Allow Next Gear MICA
- Roll up status changes to parent assignments

GROUP ASSIGNMENT PROCESS

DEFAULT ITEM FILTERS

4. Click to open the **Group Assignment Process** pane.

GROUP ASSIGNMENT PROCESS

Re-pricing method: Create duplicate

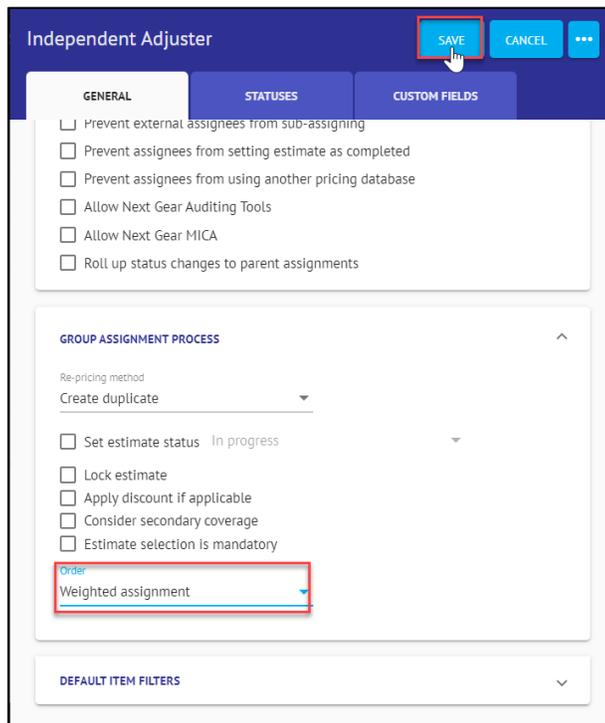
- Set estimate status: In progress
- Lock estimate
- Apply discount if applicable
- Consider secondary coverage
- Estimate selection is mandatory

Order: Lowest price first

- From the **Order** dropdown, select **Weighted Assignment**.



- Click **Save** to save the changes to the Assignment Type.





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