



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.

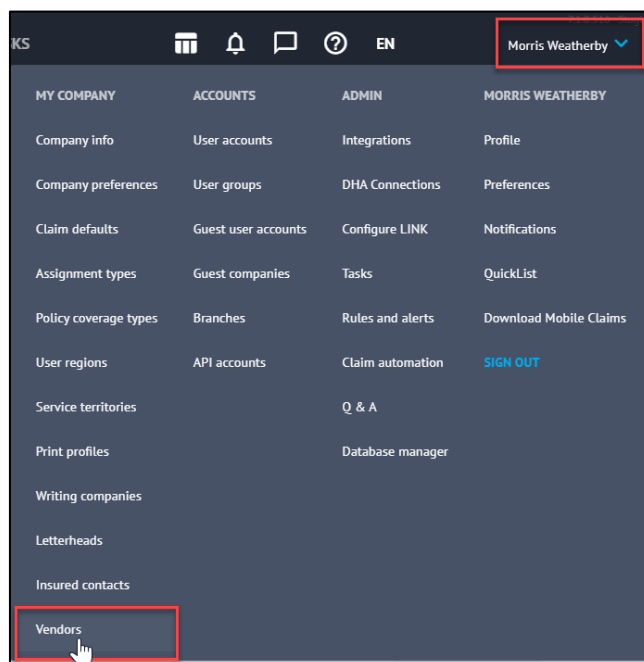
The following tasks are described in this document:

- 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.

The screenshot shows the 'Vendors' page with a search panel. The 'Branch' is set to 'AID Insurance Company' and the 'Group' dropdown is open, showing options: 'IA Firm', 'IA Firm', 'Mitigation Contractor', and 'Repair Contractor'. A red box highlights the dropdown menu.

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

The screenshot shows the 'Vendors' page with the 'Group' dropdown set to 'IA Firm'. The 'Properties' button is highlighted with a red box and a mouse cursor.

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

The screenshot shows the 'VENDOR GROUP PROPERTIES' dialog box. The 'Assignment Distribution' section is highlighted with a red box, showing 'Equal distribution' and 'Weighted distribution' radio buttons. The 'Weighted distribution' option is selected. Below the radio buttons is a link that says 'Reset assignment counter'.

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

5. 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

1. 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)

Branch: AID Insurance Company Group: IA Firm

My Vendor Group - All companies (no filter applied)

	Symbility ID	Company Name	Contact Name	Phone	City	Prov./State	Type	
<input type="checkbox"/>	533-534-210	ICIA Adjusters	John Doe	555-555-5555	Buffalo	New York	Intermediary - Independent Adjuster	Options
<input type="checkbox"/>	516-148-848	InterCon Adjusting	John Doe	555-555-5555	Dallas	Texas	Intermediary - Independent Adjuster	Options
<input type="checkbox"/>	125-425-590	LAP Adjusting	John Doe	555-555-5555	Wauwatosa	Wisconsin	Intermediary - Independent Adjuster	Options

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2. 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

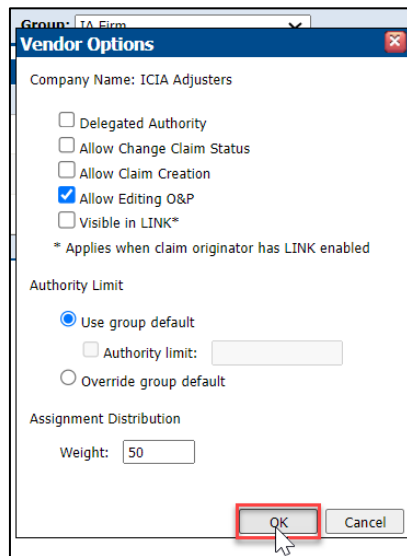
Weight:

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.

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

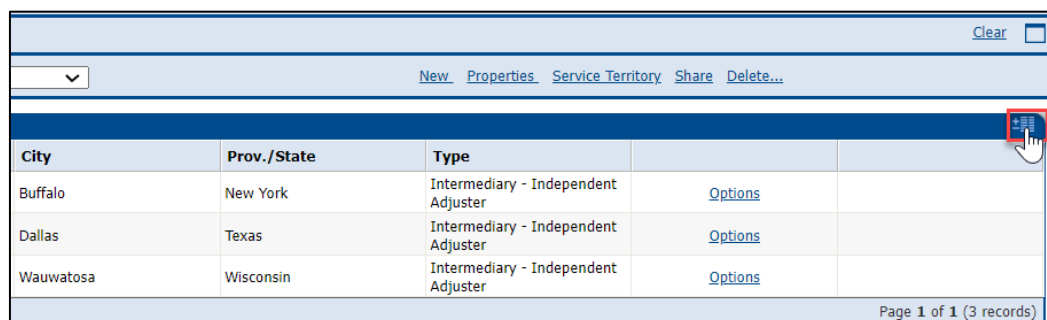


- Repeat Steps 1-3 in this section until all Vendors in the group have been assigned a weight.

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

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



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

2. Scroll down to view the new column options.

Column Selector

- ☒ City
- ☒ Prov./State
- ☒ Type
- ☐ Address
- ☐ Delegated Authority
- ☐ Postal/Zip Code
- ☐ Total Open Claims
- ☐ Normal Claims
- ☐ Emergency Claims
- ☐ CAT Claims
- ☐ Commercial General Liability Limit
- ☐ Job Size Limit
- ☐ Areas Served
- ☐ Number of Years in Business
- ☐ Full Service Property Damage Restoration
- ☐ New Home Building
- ☐ Residential Renovation
- ☐ Commercial Restoration
- ☐ Fire and Smoke Damage
- ☐ Water Damage
- ☐ Carpet Cleaning
- ☐ Fire and Smoke Contents Cleaning
- ☐ Water Damage Contents Cleaning
- ☐ Dry Cleaning
- ☐ 24/7 Availability
- ☐ On-Site Estimating
- ☐ Mobile Internet Access
- ☐ Disto Laser Range Finder
- ☐ Allow Claim Creation
- ☐ Authority Limit
- ☐ Weight
- ☐ Weight %
- ☐ Assignment Count
- ☐ Assignment Count %

Check the columns you want to appear in the table, drag to set the order.

[Reset](#)

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

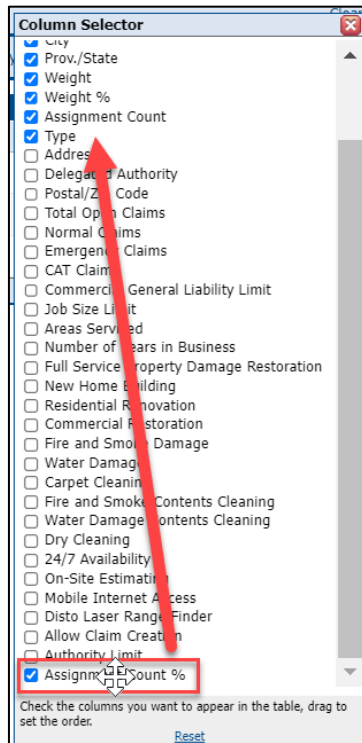
Column Selector

- ☒ City
- ☒ Prov./State
- ☒ Type
- ☐ Address
- ☐ Delegated Authority
- ☐ Postal/Zip Code
- ☐ Total Open Claims
- ☐ Normal Claims
- ☐ Emergency Claims
- ☐ CAT Claims
- ☐ Commercial General Liability Limit
- ☐ Job Size Limit
- ☐ Areas Served
- ☐ Number of Years in Business
- ☐ Full Service Property Damage Restoration
- ☐ New Home Building
- ☐ Residential Renovation
- ☐ Commercial Restoration
- ☐ Fire and Smoke Damage
- ☐ Water Damage
- ☐ Carpet Cleaning
- ☐ Fire and Smoke Contents Cleaning
- ☐ Water Damage Contents Cleaning
- ☐ Dry Cleaning
- ☐ 24/7 Availability
- ☐ On-Site Estimating
- ☐ Mobile Internet Access
- ☐ Disto Laser Range Finder
- ☐ Allow Claim Creation
- ☐ Authority Limit
- ☒ Weight
- ☒ Weight %
- ☒ Assignment Count
- ☒ Assignment Count %

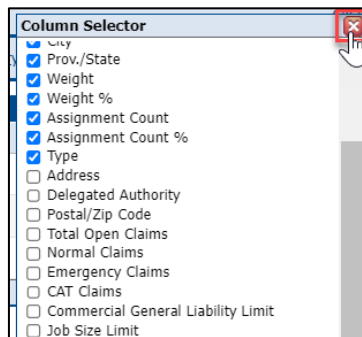
Check the columns you want to appear in the table, drag to set the order.

[Reset](#)

- 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)								Weight	Weight %	Assignment Count	Assignment Count %	Type	
<input type="checkbox"/>	<input type="checkbox"/> 532-534-210	ICIA Adjusters	Craig Batten	(555) 555-5555	Buffalo	New York		50	43.48%	0	0.00%	Intermediate - Independent Adjuster	Options
<input type="checkbox"/>	<input type="checkbox"/> 516-148-848	InterCon Adjusting	Craig Batten	(519) 589-9735	Dallas	Texas		45	38.13%	0	0.00%	Intermediate - Independent Adjuster	Options
<input type="checkbox"/>	<input type="checkbox"/> 125-425-590	L&P Adjusting	Linda Morrison	(414) 555-9876	Wauwatosa	Wisconsin		20	17.39%	0	0.00%	Intermediate - 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
<input type="checkbox"/>	516-148-848	InterCon Adjusting			Dallas	Texas	N/A	33.33%	0	0.00%	Intermediary - Independent Adjuster
<input type="checkbox"/>	125-425-590	L&P Adjusting			Wauwatosa	Wisconsin	N/A	33.33%	0	0.00%	Intermediary - Independent Adjuster

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
<input type="checkbox"/>	516-148-848	InterCon Adjusting			Dallas	Texas	45	47.37%	0	0.00%	Intermediary - Independent Adjuster
<input type="checkbox"/>	125-425-590	L&P Adjusting			Wauwatosa	Wisconsin	Inactive	Inactive	Inactive	Inactive	Intermediary - Independent Adjuster

Manually Resetting the Assignment Counter

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

Vendors

Search panel - All companies (no filter applied)

Branch: AID Insurance Company

Group: IA Firm

New Properties Service Territory Share Delete...

My Vendor Group - All companies (no filter applied)

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

VENDOR GROUP PROPERTIES

Save Cancel

Discount Bands

Description	Discount %	>= Sub-Total

☐ Automatically persist discount onto new revisions

Authority Limit

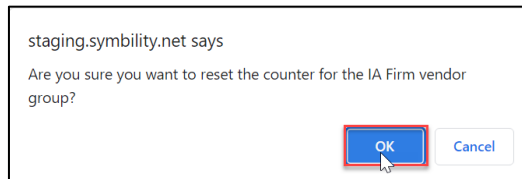
☐ Group default authority limit:

Assignment Distribution

☐ Equal distribution ☒ Weighted distribution

Reset assignment counter

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
	516-148-848	InterCon Adjusting	Craig Batten	(519) 589-9735	Dallas	Texas	45	39.13%	0	0.00%	Intermediary - Independent Adjuster
	125-425-590	L&P Adjusting	Linda Morrison	(414) 555-9876	Wauwatosa	Wisconsin	20	17.39%	0	0.00%	Intermediary - Independent Adjuster

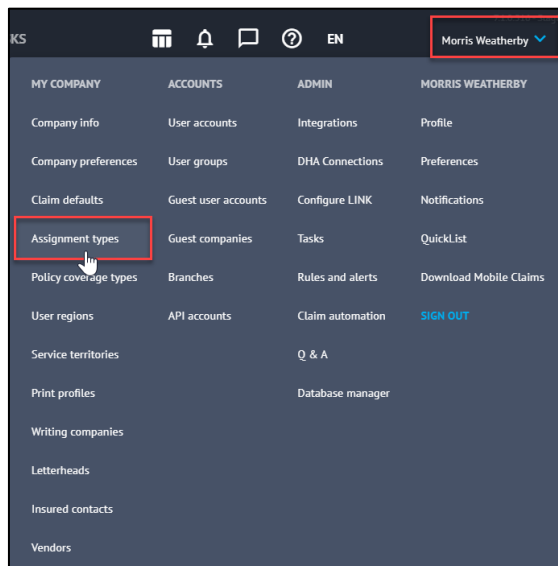
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Note: The Assignment Counter will automatically reset after any of the following events:

- 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 Assignment	
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

STATUSES

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

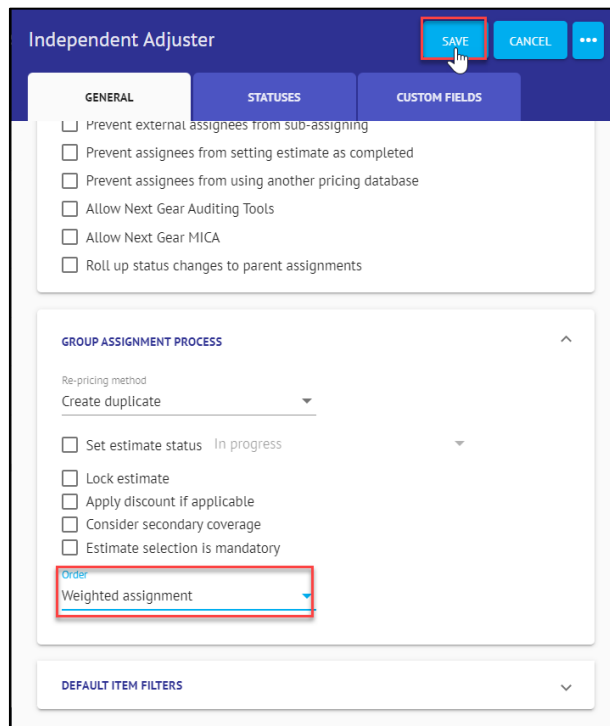
Order
Lowest price first

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



A screenshot of a dropdown menu titled "Order". The menu is open, showing three options: "Lowest price first", "Highest available capacity first", and "Weighted assignment". The "Weighted assignment" option is highlighted with a red rectangular box, and a mouse cursor is pointing at it. A small downward arrow is visible to the right of the options.

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



A screenshot of the "Independent Adjuster" form. The form has a dark blue header with the title "Independent Adjuster" and three buttons: "SAVE", "CANCEL", and a menu icon. Below the header are three tabs: "GENERAL", "STATUSES", and "CUSTOM FIELDS". The "GENERAL" tab is active, showing a list of checkboxes for various settings. Below this is a section titled "GROUP ASSIGNMENT PROCESS" with a "Re-pricing method" dropdown set to "Create duplicate". Underneath are several checkboxes for assignment rules. At the bottom of this section is an "Order" dropdown menu, which is open and shows "Weighted assignment" selected, highlighted with a red rectangular box. At the very bottom of the form is a "DEFAULT ITEM FILTERS" section with a downward arrow.



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