

CLAIMS INTAKE CHECKLIST

WORKFLOW	
<input type="checkbox"/>	Download claims in Xactimate
<input type="checkbox"/>	Batch print loss reports from Xactimate
<input type="checkbox"/>	Map and route claims in Xactanalysis
<input type="checkbox"/>	Build schedule from routing
	Contact insureds
<input type="checkbox"/>	- Verify loss location
<input type="checkbox"/>	- Verify mortgagee
<input type="checkbox"/>	- Ask age of roof
<input type="checkbox"/>	- Identify extra coverages:
<input type="checkbox"/>	- Outbuildings
<input type="checkbox"/>	- Contents
<input type="checkbox"/>	- ALE
<input type="checkbox"/>	- Trees down?
<input type="checkbox"/>	- Set appointments
	Set up claims in Xactimate:
<input type="checkbox"/>	- Mark date contacted
<input type="checkbox"/>	- Coverages
<input type="checkbox"/>	- Deductible(s)
<input type="checkbox"/>	- Sales tax
<input type="checkbox"/>	- Loss type
<input type="checkbox"/>	- Header
<input type="checkbox"/>	- Opening/closing statement
<input type="checkbox"/>	- Complete activity diary
<input type="checkbox"/>	- Import grouping tree
<input type="checkbox"/>	Request CAD/pictometry/Eagleview if necessary
<input type="checkbox"/>	Request priors if necessary
	Carrier specific:
<input type="checkbox"/>	- Set reserves
<input type="checkbox"/>	- Request priors
<input type="checkbox"/>	- Coverage analysis
<input type="checkbox"/>	- ISO research