# Flowchart for Xactanalysis Claims

## Receive Claim

**1. Review Client Loss Notice in FileTrac**
   A. Look for directions from Desk Adjuster
   B. Note any special directions (non-waiver)

**2. In Xactimate – Connect to receive Claim**
   A. Click on **Connect** in Control Center
   B. New assignment will be **bold** in Projects the first time it is opened.

**3. In Xactimate - Enter first contact date and inspection date**

**4. Save/Exit Project**

**5. Click Connect in Control Center**
   A. Must be connected to the internet
   B. This will stop timer in Xactanalysis and add info directly

**6. Enter first contact note in Xactanalysis**

## Inspection

**1. Call 5 minutes away from your inspection.**

**2. Photos (minimum)**
   A. Overview of Risk
   B. Close up of Address
   C. All four elevations
   D. Overview of area(s) damaged
   E. Close up of damage

**3. Measure/Diagram area(s) damaged**

**4. Scope the Damage**

## After Inspection

**2. Enter Photos into Xactimate**
   A. Label all Photos with specifics of what you saw on inspection
   B. Click **Print**
   C. Only Check in front of Images
   D. Click **Upload**
   E. Click **Connect** in Control Center (Must be connected to Internet)

**3. Create Estimate**

**4. Enter inspection/damages details in General Loss Report (GLR)**
   A. Click **Connect** in Control Center (Must be connected to Internet)
   B. *If* AMFAM –
      i. Mark claim **Completed**
      ii. Click **Connect**
      iii. In FileTrac, enter **note**
      iv. Check *ready for review*

**4. Use token to create Final Report**
   A. Upload in FileTrac as a Word Document

## Submit for Review

**1. Upload all required documents into FileTrac**

**2. In Notes, select the correct clipping.**
   A. Adjuster Closing Report Submission
   B. Adjuster Status Report Submission
   C. Adjuster Supplement Report Submission

**3. Fill out clipping and check the *Ready for Review* Box, then Save Comment.**