

Setting and Inspection

Issue: Setting an Inspection

1. The claim needs to be documented prior to sending and inspection. Ensure the following are completed before sending inspection.
 - a. 3 C properly documented. Confirm with repair facility that the cause of failure is identified and visible or demonstrable.
 - b. Review and verify any past claims related to the current claim. Document in the notes.
 - c. Ensure diagnostic templates are completed and saved in the claim notes.
 - d. Check for any related TSBs or Recalls.
 - e. Estimate must be received and keyed into the claim and verified.
 - f. Customer statement on file
2. Inspections should only be set to confirm the reported failure. Inspections should only be set if none of the below apply or cannot be quickly obtained:
 - a. Repair Facility submitted photos
 - b. Failure confirmation via testing i.e.: alternator voltage test, pressure tests, etc.
3. At this me, you will need to post your verification note. To do so select the **[Add Notes]** button located under the **Actions** tab
4. Select Inspection verification note and enter the reasoning why you are sending inspection or if any of the above where done why there is no need for inspection.
5. Once you've confirmed the previous steps have been completed inspection is ready to be set 6. Go to **Acon Tabs** and select order inspection.
7. Now be taken to the Order Inspection screen. Ensure you confirm the repair facility email address.
8. Next, determine if you will need fluid analysis done during the inspection. If needed select YES
9. In the **[Inspection Reason]** field, ensure you document clearly and concisely exactly what you want the inspector to document.
10. If needed, document any special requests in the corresponding **[Special Request]** field. If there are no special requests, leave this field blank.
11. At this me, you're ready to set your inspection. Do so by selecting the **[Send Inspection]** button found in the bottom, right corner
12. This will generate an email and send it to Southwest Inspections (SWIS). At this me, you will see the confirmation that the inspection was sent.
13. You can check the inspection by opening the [Related] tab of the claim. Scroll down to the **[Inspection Items]** portion. You will see the status for the Inspection as **"Ordered"**
14. Upon receipt of a completed inspection, the inspector will be listed within the Inspection Received panel
15. Select the Inspection ID number to view inspection at this me, you can review your inspection to document the information needed.
16. Now you'll need to generate a review note, Select **[Inspection Review]** from the dropdown on the right and write your review in the note field.
17. To finalize, you'll need to mark your inspection as reviewed. Select the **[Mark Inspection Reviewed]** button on the **[Order Inspection]** screen.
18. Afterwards, your inspection will reflect as reviewed on the claim front screen

Purpose

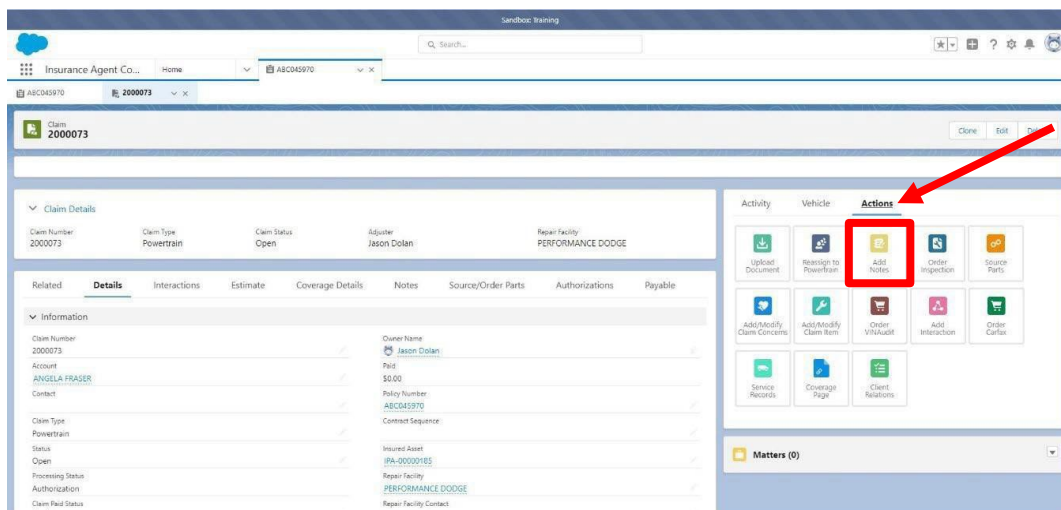
This SOP is intended to outline the process for setting and reviewing an inspection.

Teams Impacted

- Small Claims
- General Claims
- Technical Claims

Procedure

- American Auto Shield (AAS) requires that claims be documented prior to setting an inspection. Before scheduling an inspection ensure the following are complete:
 - 3C's properly documented and saved for each failure reported.
 - Review and verify any past claims related to the current claim. Document in the notes.
 - Ensure diagnostic templates are completed and saved in the claim notes.
 - Check for any relative TSBs or Recalls and document in the claim notes.
 - Inspections are NOT to be set without an estimate received and keyed into the claim.
 - Service records (if applicable) should be received and reviewed.
 - Customer statement on file (if applicable)
 - Confirm with repair facility that cause of failure is identified and visible or demonstratable.
 - Be sure to identify the need for records prior to setting an inspection. In some cases, records alone may prove pre-existing, lack of maintenance, etc. In these events, the records alone may complete the claim.
- Inspections should only be set to confirm the reported failure. Keep in mind, there are multiple ways to accomplish this. Inspections should only be set if none of the below apply or cannot be quickly obtained:
 - Repair Facility submitted photos
 - Failure confirmation via testing i.e.: alternator voltage test, pressure tests, etc.
- At this time, you will need to post your verification note. To do so select the **[Add Notes]** button located under the *Actions* tab.



- From the drop-down list, select **[Inspection Verification Note]**. In the field to the right, enter your reasoning as to why you are or are not setting an inspection. Once completed select **[Next]**.



NOTES

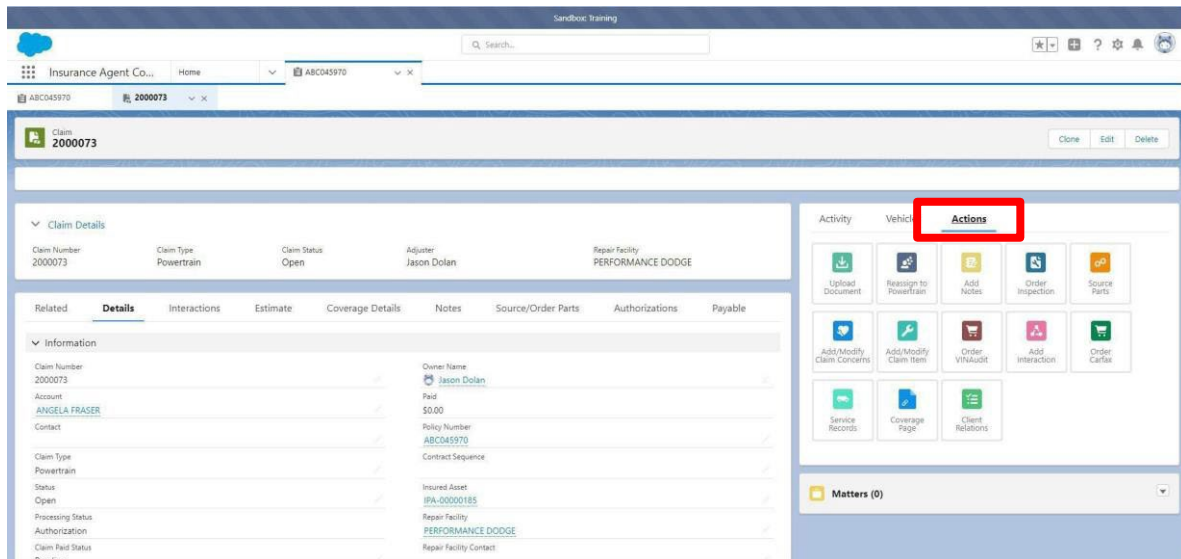
Inspection Verification Note

Setting inspection to confirm failure to timing system and document extent of sub damage to engine.

Cancel Save

Save Notes

- Once you've confirmed the previous steps have been completed and are ready to set an inspection, begin by selecting the **[Actions]** tab to the right of your claim screen.



Sandbox Training

Insurance Agent Co., Home ABC045970

ABC045970 2000073

Claim 2000073 Clone Edit Delete

Claim Details

Claim Number: 2000073 Claim Type: Powertrain Claim Status: Open Adjuster: Jason Dolan Repair Facility: PERFORMANCE DODGE

Related Details Interactions Estimate Coverage Details Notes Source/Order Parts Authorizations Payable

Information

Claim Number: 2000073 ✓

Account: ANGELA FRASER ✓

Contact: ✓

Claim Type: Powertrain ✓

Status: Open ✓

Processing Status: ✓

Authorization: ✓

Claim Paid Status: Pending ✓

Owner Name: Jason Dolan ✓

Paid: \$0.00 ✓

Policy Number: ABC045970 ✓

Contract Sequence: ✓

Insured Asset: 9FA-00000185 ✓

Repair Facility: PERFORMANCE DODGE ✓

Repair Facility Contact: ✓

Activity Vehicle Actions

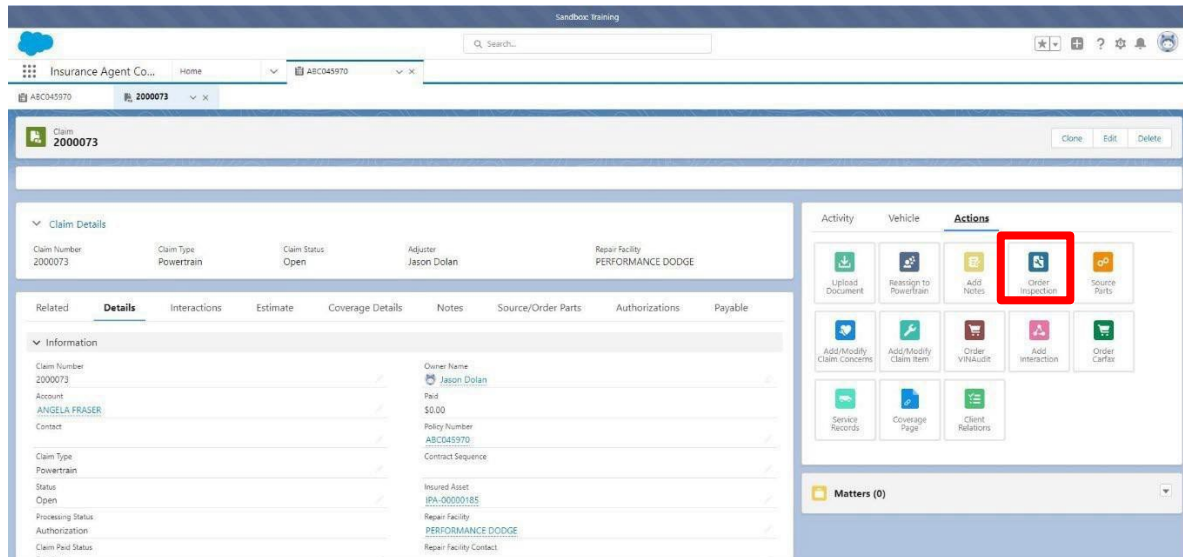
Upload Document Reassign to Powertrain Add Notes Order Inspection Source Parts

Add/Modify Claim Concerns Add/Modify Claim Item Order VIN Audit Add Interaction Order Carfax

Service Records Coverage Page Client Relations

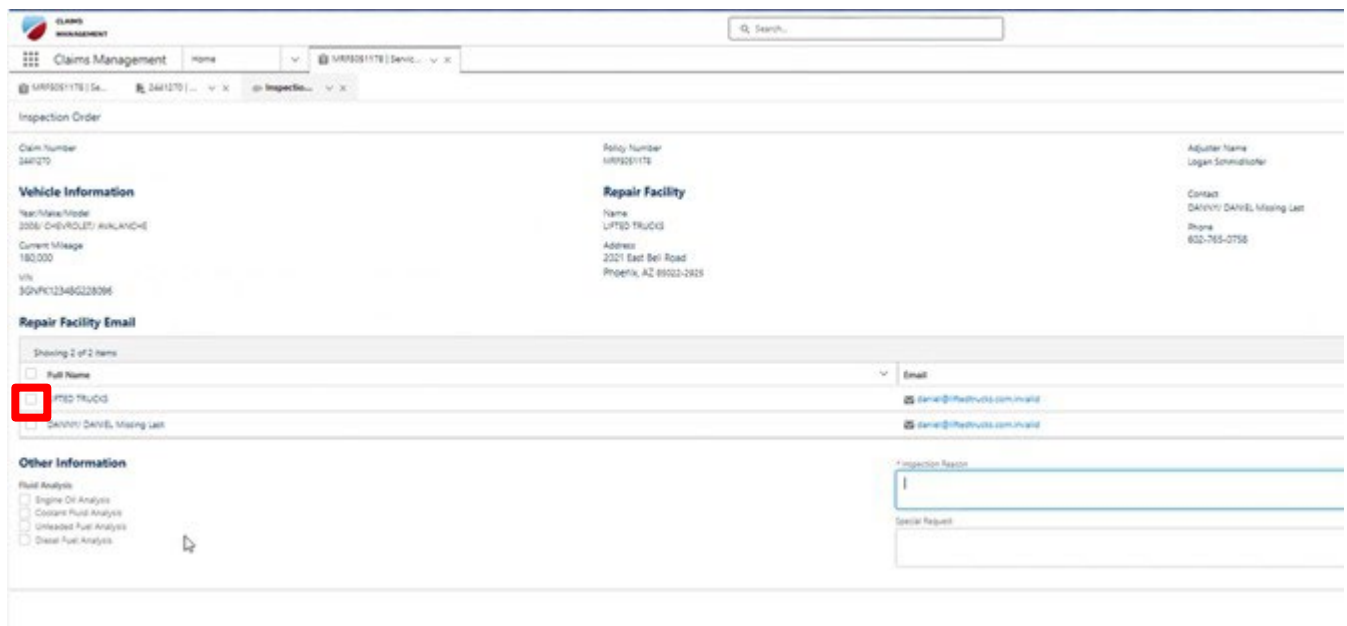
Matters (0)

6. This will bring up the Actions menu. At this time select **[Order inspection]**.



The screenshot shows the 'Insurance Agent Co.' interface. The top navigation bar includes 'Home' and 'ABC045970'. The main content area displays 'Claim: 2000073' with details like 'Claim Type: Powertrain', 'Claim Status: Open', 'Adjuster: Jason Dolan', and 'Repair Facility: PERFORMANCE DODGE'. On the right, the 'Actions' menu is open, and the 'Order inspection' button is highlighted with a red box.

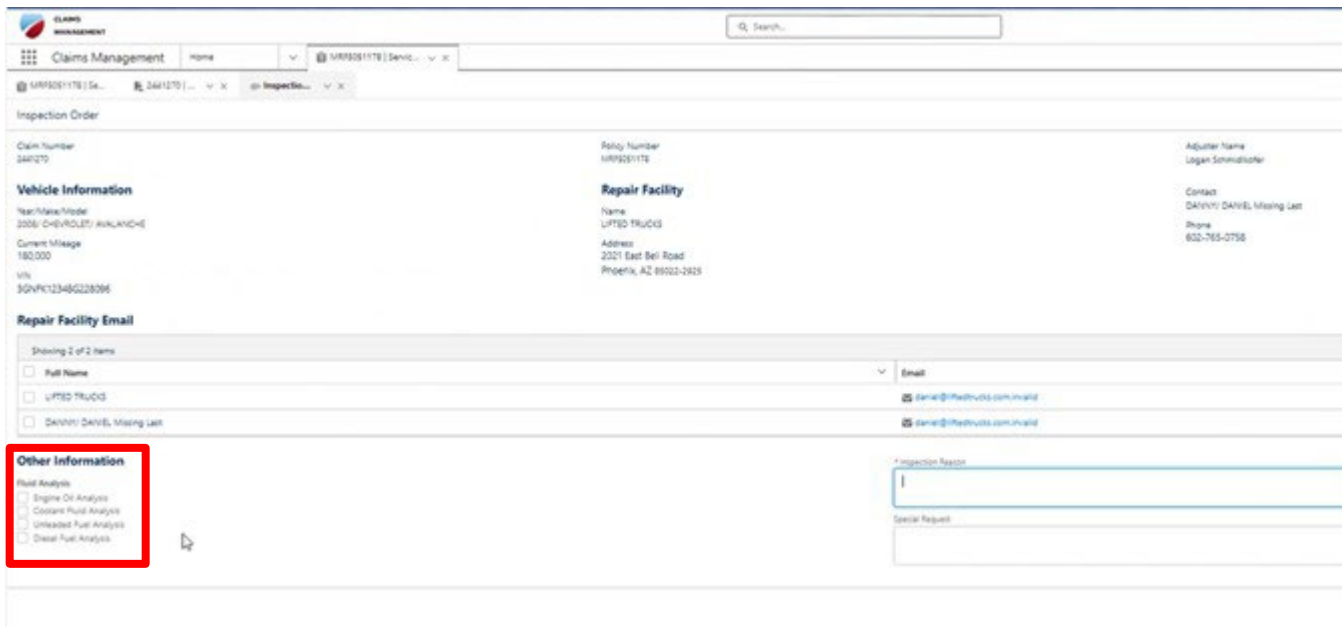
7. You will now be taken to the Order Inspection screen. Ensure you confirm the repair facility email address. If matching, select the **[check box]** found next to the email address.



The screenshot shows the 'Order Inspection' screen. The 'Repair Facility Email' section is highlighted, showing a list of email addresses. A red box highlights the checkbox next to the email address 'daniel@thetrucks.com'. The 'Email' column shows the email address 'daniel@thetrucks.com'.

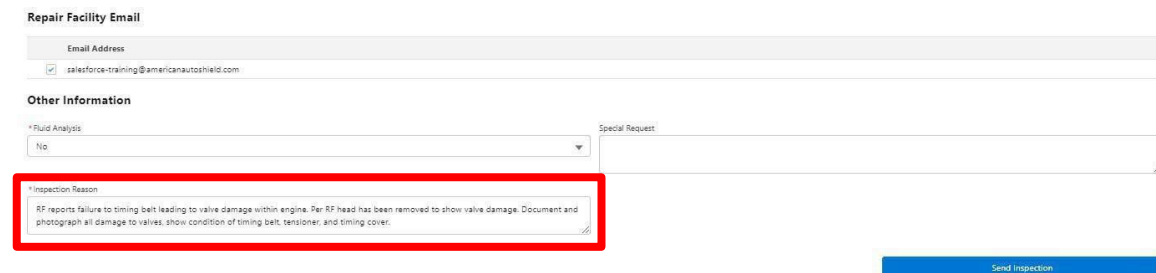
8. Next, determine if you will need fluid analysis done during the inspection. Potential reasons for this would be:
- Incorrect oil weight used
 - Improper type of transmission fluid used
 - Confirmation of foreign fluid or debris i.e.: water intrusion

9. Once you've determined the need for fluid analysis select box of what fluid you would like analyzed. Leave box's unchecked if no fluid analysis is needed.



The screenshot shows the 'Inspection Order' form in the American Auto Shield Claims Management system. The form includes sections for Vehicle Information, Repair Facility, Repair Facility Email, and Other Information. The 'Other Information' section is highlighted with a red box, showing checkboxes for Fluid Analysis (Engine Oil, Coolant, Unleaded Fuel, Diesel Fuel) and an 'Inspection Reason' field.

10. Now it's time to set the inspection reason. In the **[Inspection Reason]** field, ensure you document clearly and concisely exactly what you want the inspector to document.



The screenshot shows the 'Inspection Reason' field in the American Auto Shield Claims Management system. The field is highlighted with a red box, showing a text area where the user can enter the inspection reason. The text area contains the following text: 'RF reports failure to timing belt leading to valve damage within engine. Per RF head has been removed to show valve damage. Document and photograph all damage to valves, show condition of timing belt, tensioner, and timing cover.'

11. At this point, determine if there are any special requests. Examples would be:
- Having the inspector call repair facility prior
 - Specific tools needed to demonstrate the failure.
 - Advising the inspector of complications
 - Vehicle on lift, vehicle outside, etc.
12. If needed, document any special requests in the corresponding **[Special Request]** field. If there are no special requests, leave this field blank.

Repair Facility Email

Email Address
☒ salesforce-training@americanautoshield.com

Other Information

*Fluid Analysis
 No

*Inspection Reason
 RF reports failure to timing belt leading to valve damage within engine. Per RF head has been removed to show valve damage. Document and photograph all damage to valves, show condition of timing belt, tensioner, and timing cover.

Special Request

Send Inspection

13. At this time, you're ready to set your inspection. Do so by selecting the **[Send Inspection]** button found in the bottom, right corner.

Repair Facility Email

Email Address
☒ salesforce-training@americanautoshield.com

Other Information

*Fluid Analysis
 No

*Inspection Reason
 RF reports failure to timing belt leading to valve damage within engine. Per RF head has been removed to show valve damage. Document and photograph all damage to valves, show condition of timing belt, tensioner, and timing cover.

Special Request

Send Inspection

14. This will generate an email and send it to Lemon Squad. At this time, you will see the confirmation that the inspection was sent. Select **[Next]**

Confirmation

Inspection Request successfully sent.
 Request ID: 748239
 Status Message: The new inspection request was added successfully.

Steps:
 1. Order Inspection
 2. Confirmation

Previous Next

15. You can check the inspection by opening the **[Related]** tab of the claim.

Claim 2000073

Claim Details

Claim Number: 2000073 Claim Type: Powertrain Claim Status: Open Adjuster: Jason Colan Repair Facility: PERFORMANCE DODGE

Related Details Interactions Estimate Coverage Details Notes Source/Order Parts Authorizations Payable

Files (0)

Upload Files

Or drop files

Claim Participants (0)

Customer Concerns (1)

Customer Concern Name	Coverage Group	Customer Concern	Cause of Failure
CC-00000002	Engine	CS states vehicle stopped running on highway. Will not start.	Timing belt broke - jumped time engine locked

Claim Payment Summaries (0)

Claim History (1)

Activity Vehicle Actions


Upload Documents Assign to Repair Shop Add Notes Order Inspection Source Parts Add/Modify Claim Concerns Add/Modify Claim Item Order Voucher Add Interaction Close Carter Service Records Coverage Page Close Relations

Matters (0)



- | Inspection Items (1) | | | | |
|---|---------------------|------------|-----------------|---------------------------------------|
| Name | Claim Item Category | Claim Item | Activity Status | Payee |
| Order Inspection - 745934 | Claim Processing | Ordered | | Southwest Inspections |
- [View All](#)

- The screenshot shows an email interface. At the top, the sender is 'Lemon Squad <reporter@lemonsquad.com>' and the recipient is 'To: Logan Schimidkofer'. Below the header, a red warning bar states: 'This sender reporter@lemonsquad.com is from outside your organization.' with buttons for 'Block sender' and 'Show blocked content'. The main body of the email has a yellow background with a 'CAUTION' message: 'This email was sent from an address outside of the organization. Before clicking on any links or opening any attachments, verify that you recognize the sender and know that the content is safe.' The email text reads: 'A new inspection request has been placed for a 2008 CHEVROLET AVALANCHE! The claim number is: 2441270. We will dispatch an inspector to that location as soon as we can. VIN: 3GNFK12348G228096 Adjuster: Logan Schimidkofer Adjuster Email: logan.schimidkofer@americanautoshield.com Vehicle Location: 2021 East Bell Road Phoenix, AZ 85022-2925 Your order number is: 650611, if you have a need for assistance, or need to request a cancelation, please contact our customer support line, (888) 231-7965, and, be sure to provide them with your order number. Do not reply to this message; the reply address is not monitored. This email was sent to you because your email was provided to us as the agent handling the claim for the automobile listed above. If this has been sent in error, please contact our support line and report the mistake so we can resolve this matter. All services provided are subject to our Terms and Conditions'.

- Your 2014 MERCEDES BENZ GL350 Auto Inspection is Ready:  Contains Personally Identifiable Information (PII) Data

LS Lemon Squad <reporter@lemonsquad.com>
To: Logan Schmidkofer

You forwarded this message on Wed 5/29/2024 3:06 PM

This sender reporter@lemonsquad.com is from outside your organization.

CAUTION: This email was sent from an address outside of the organization. Before clicking on any links or opening any attachments, verify that you recognize the sender and know that the content is safe.

Lemon Squad just finished the report on the vehicle 2014 MERCEDES BENZ GL350! The claim number is: 2441245. This report is hot off the presses, and we can't wait for you to take a look!

VIN: 4JGDF2EE5EA423766

Adjuster: Logan Schmidkofer

Adjuster Email: logan.schmidkofer@americanautoshield.com

Inspector: Katie Heintzeman

Vehicle Location:
1545 S 41st St Manitowoc WI 54220-7313

Your report comes in two formats: an online report that opens in any browser, or, if you prefer, it comes as a PDF that is easy to save, share or print.

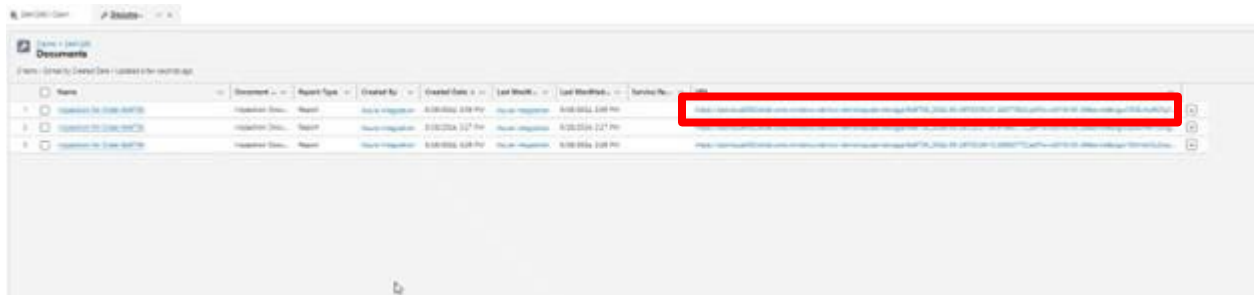
 - [Online Report](#)
 - [PDF Report](#)

Your order number is: 649736. If you have a need for assistance, please contact our customer support line, (888) 231-7965, and be sure to provide them with your order number.

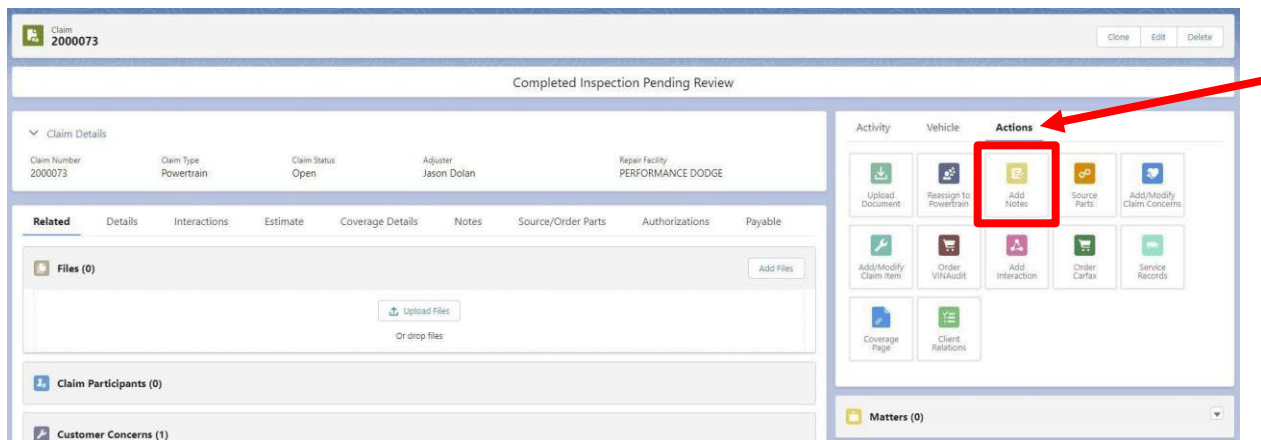
If you have issues clicking the links above, you may put the link below, directly into any internet browser address bar.

https://checkipointurlprotection.com/v1?url=https%3A%2F%2Flemonsquad.com%2Fcustomer%2Fview-report%2F649736%3Fclient_token%3D%3De056abd26b341b51d0cdec3ed2842a3f%26auth_token%3D22b712737f59dc4223824fadb20c9fb7&q=ODgyZTk5YyZlZWU0Yic2SQ%3D%3D&h=ODVlMDhlM2F1YzUwMWUxMjcyZmVhNDExZiRlZTl%3D&w=YzU1OmFzZXIyZmVhYXV0b3NoaWVzZDciOm86Nk1ZmRlODdmNDMxYzlmOTdlMzZlNTMwNmNlMDVhNWU6diE6dDpJ

19. When inspection report has been completed and submitted, Report will be loaded into the claim documents for ease of access.



20. Now you'll need to generate a review note, to do so select the **[Add Notes]** button under the actions tab of your claim.



21. This will then bring up the **[Add Notes]** tab, select the + sign next to Add Note.



22. Doing so will generate the note entry field. Select **[Inspection Review]** from the dropdown on the right and write your review in the note field. Once complete select **[Save]**.



Notes

Category: Inspection Reviewed

Notes: Per inspection review, timing belt confirmed broken, no signs of lack of maint, as was replaced 20k miles ago. No signs of external influence. Per photos does not appear engine replacement is in order, should be able to resolve with cylinder head repair and timing belt replacement.

Cancel Save

Save Notes

23. Once saved you will see the note posted in your Notes window. Select **[Save]**



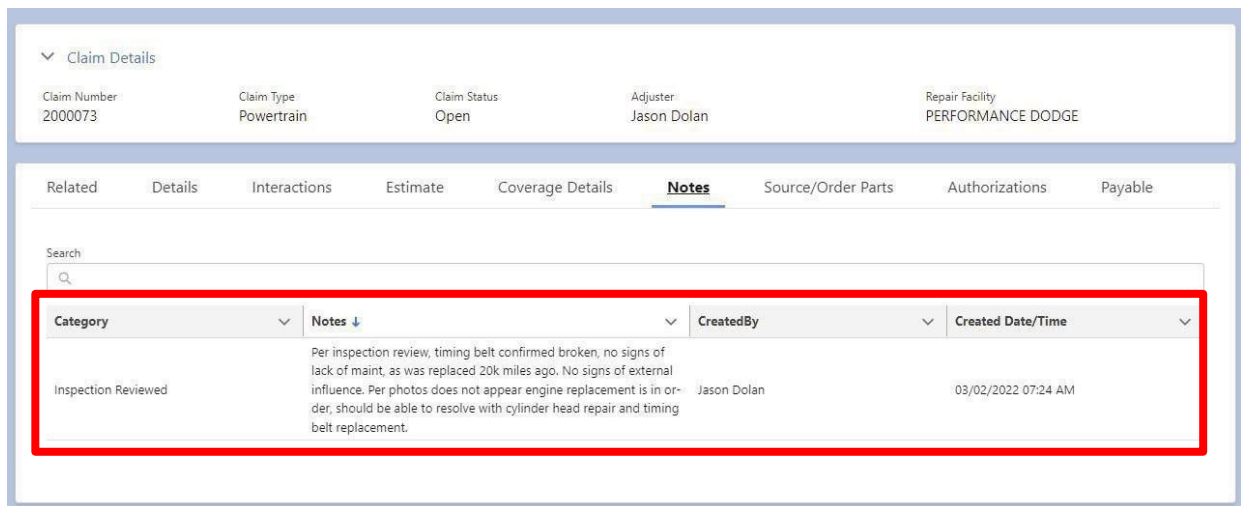
Notes

Inspection Reviewed: Per inspection review, timing belt confirmed broken, no signs of lack of maint, as was replaced 20k miles ago. No signs of external influence. Per photos does not appear engine replacement is in order, should be able to resolve with cylinder head repair and timing belt replacement.

+ Add Note

Save Notes

24. At this point you will see your note posted to the claim by selecting the **[Notes]** tab.



Claim Details

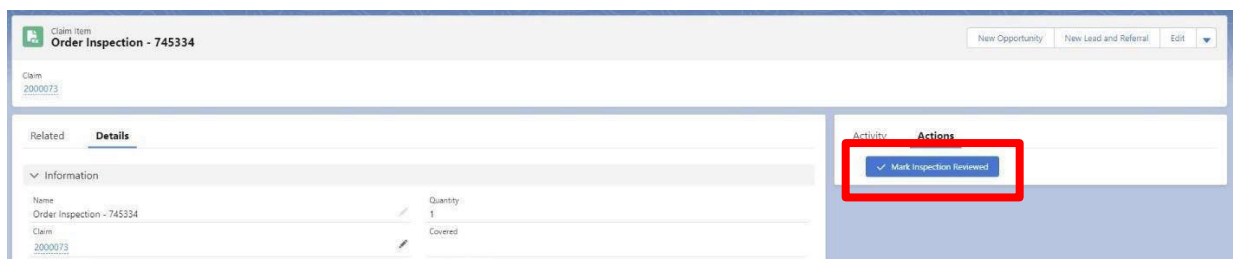
Claim Number: 2000073 Claim Type: Powertrain Claim Status: Open Adjuster: Jason Dolan Repair Facility: PERFORMANCE DODGE

Related Details Interactions Estimate Coverage Details **Notes** Source/Order Parts Authorizations Payable

Search

Category	Notes	CreatedBy	Created Date/Time
Inspection Reviewed	Per inspection review, timing belt confirmed broken, no signs of lack of maint, as was replaced 20k miles ago. No signs of external influence. Per photos does not appear engine replacement is in order, should be able to resolve with cylinder head repair and timing belt replacement.	Jason Dolan	03/02/2022 07:24 AM

25. To finalize, you'll need to mark your inspection as reviewed. Select the **[Mark Inspection Reviewed]** button on the **[Order Inspection]** screen.



Claims Item Order Inspection - 745334

Claim: 2000073

Related Details

Information

Name	Quantity
Order Inspection - 745334	1

Claim: 2000073

Price: \$1,000.00

Activity Actions

Mark Inspection Reviewed

26. Afterwards, your inspection will reflect as reviewed on the claim front screen.

Inspection Items (1)			
Name	Claim Item Category	Claim Item Activity Status	Payee
Order Inspection - 745334	Claim Processing	Reviewed	Southwest Inspections
View All			

Approval & Revision

Date Created 2/25/2022	Created By Johnnie Martinez		Date Approved 2/28/2022	Approved By Jason Dolan	
Date Revised 4/21/2022	Revised by Johnnie Martinez	Revision Description Update screenshot	Date Approved 4/22/2022	Approved By Jason Dolan	
Date Revised 08/02/2023	Revised by Melissa Bryant	Revision Description Add Fast Track Article	Date Approved 08/02/2023	Approved By Amanda Wiseman	
Date Revised [5/31/24]	Revised by [Justin Yelton]	Revision Description [Lemon Squad adjustments]	Date Approved 06/06/2024	Approved By Jeremy Tan	
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]	