EDI/XactAnalysis Workflow

Estimate Export
Status Export
Note Export
Custom Doc Export

Full Cycle

Customer CMS

Insured notifies carrier of loss

Carrier determines if claim/estimate will be assigned to an internal or external Adjuster/IA

Status export is triggered notifying the IA of the assignment

Status export is triggered with the Adjuster information

Estimate export is triggered with all applicable estimate information

Status Export

Custom Doc Export

Note Export

End Cycle

Data Exports

Data Exports

Data Exports

XactAnalysis

Customer initiates the FNOL via EDI and the assignment is received in XactAnalysis

Assignment is sent to the IA's queue

Data Export

Data Export

Data Export

Estimate enters into the Estimate Review Queue

Reviewer is notified of uploaded estimate

Exports trigger throughout the life of the claim

IA determines which adjuster will be assigned

Estimate Received in XactAnalysis (documents/photos)

Are corrections needed?

No

Reviewer marks the Estimate Reviewed Complete

Yes

Xactimate

Assignment is directly sent to Adjuster, and is received in Xactimate

Adjuster completes & uploads estimate from Xactimate to XactAnalysis

Reviewer marks the Estimate Reviewed with Exceptions