CALL ADMIN GUIDE

Creating a claim using Encircle is easy! Simply follow the steps below to create a new claim, document the loss with Encircle Link, generate a preliminary report, and assign a Project Manager.

CREATING A CLAIM WITHOUT EXTERNAL NOTIFICATIONS

Step 1: Create The Claim

1. From the **Claim Inbox,** click the **Add Claim** button.
2. The **Add Claim** pop-up window will open. Follow the format outlined below and enter basic information as needed:
   a. **Claim Identifier** or reference number.
   b. Complete all fields as required by your organization.
   c. **Enter relevant policyholder information** including email and mobile phone number.
   d. **Enter the rooms (affected)** as indicated by the policyholder.
3. Click **Save.**

Step 2: Create The Link With The Policyholder To Get Photos

1. **Add a Link** with the policyholder to receive images.
   a. From the **Link** section click the **Add** button.
   b. Ensure the contact information is complete in the pop-up window.
   c. Select a **Link delivery method** (text message is preferred).
   d. Select the room named **"Policyholder Photos".**
   e. Click the **Create** button.

Step 3: Guide The Policyholder To Take Photos Using Link

1. Advise the policyholder that you have sent a Link to their mobile device via text message or email.
2. Ask the policyholder to open the message and tap on the last **Link message** link (or to check email if sent via email).
3. Their **web browser will open** and display your logo. Ask them to tell you when they see this screen.
4. For each room that is listed, they will need to take **6–10 photos** from **left to right** of the room standing at the entrance to provide a panoramic view.

Advise the policyholder to follow these steps to capture photos:

   e. Tap the **Camera** icon to open the camera.
   f. Tap the **Camera** button to take a photo of the room standing at the entrance of the room starting at the left.
   g. If happy with the photo, tap **OK** or **Use Photo.**
   h. The main screen returns. Tap the **Camera** icon for the room again and repeat the process, adjusting the camera a bit to the right to capture more of the room.
   i. Repeat the process until there is good coverage of the room.
   j. Repeat the process for the remaining rooms.

Optional: *View some of the incoming photos and provide feedback to the policyholder about the photos.*

Step 4: Setup The Work Authorization Agreement And Send To The Policyholder

1. Setup a **Work Authorization** for the policyholder to review and sign.
   a. From the **Documents** section, click the **Generate Report** button.
   b. Choose **PDF.**
   c. Choose your **Work Authorization form** from the list.
   d. Update the form as needed and click **Save.**
2. Attach the **Work Authorization agreement** to the Link.
   a. Click on **+Documents** icon on the Link.
   b. Select the **Work Authorization agreement(s).**
   c. Click **Send Document.**
   d. Advise the policyholder you have sent a new Link with the document. They can review and sign after they complete photo process.

Step 5: Setup The Preliminary Report Form

1. Setup the preliminary report with the current now information. The PM can complete onsite.
2. From the **Documents** section, click **Generate Report.**
3. Select **PDF Report.**
4. Select your **Preliminary Report** from the list.
5. Update the fields and click **Save.**

Step 6: Share/Dispatch

1. From the **Adjusters/Contractors** section click the **Share** button.
2. Enter the **email address** of the recipient and click **Share.**
3. Repeat to add additional shares.