Smart Auto Assignment

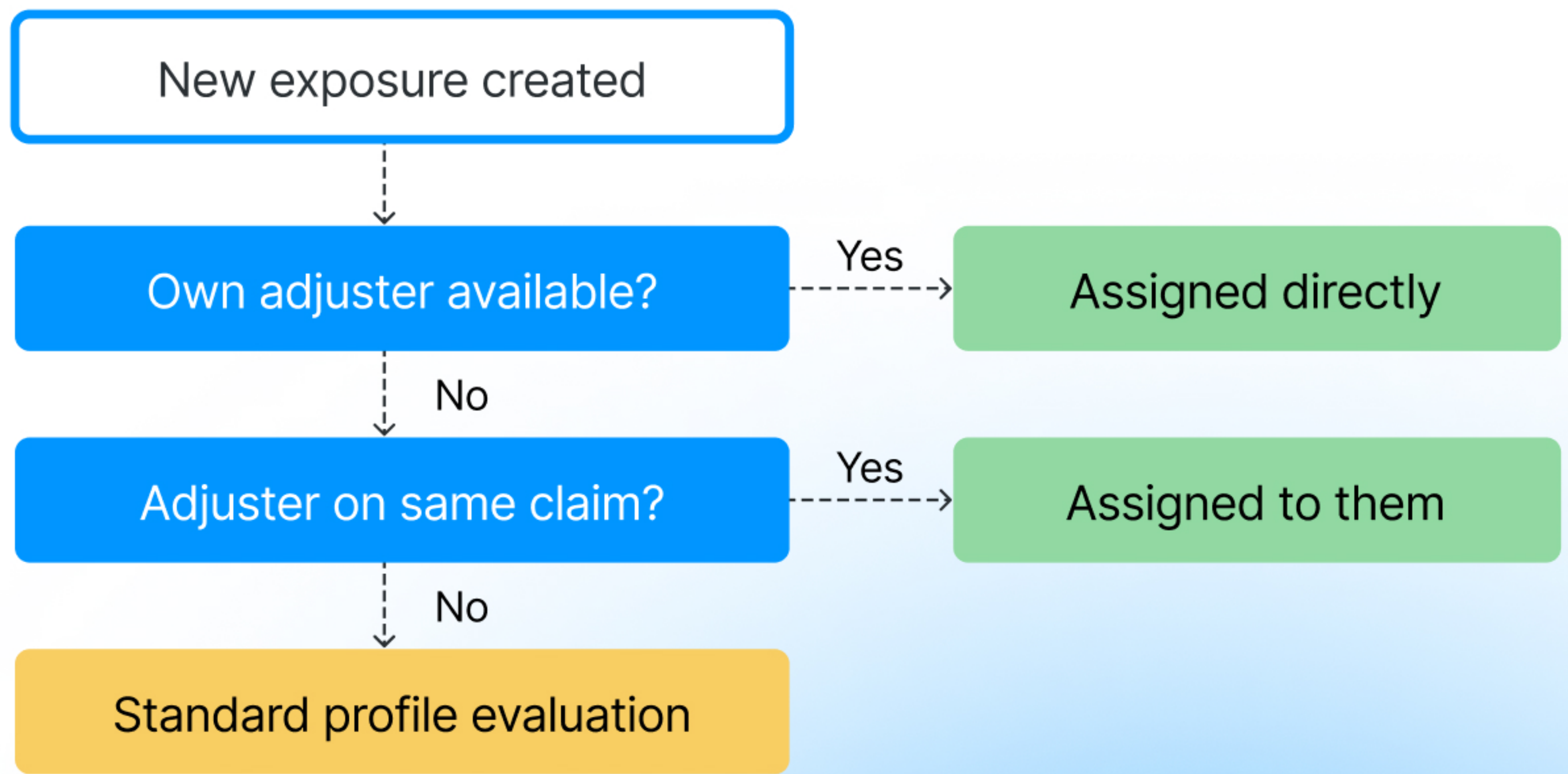
snapsheet

Route every claim, exposure, and task to the right queue.

Manual assignment doesn't scale. Full stop.

Volume increases just mean more files sit in a neglected queue until someone has time to sort them (or you're expending resources for someone to do it full-time).

Then those same admins are redoing their own work to reassign claims every time an adjuster takes PTO, exceeds their capacity, or the licensing needs for a claim change. *Every hand-off adds delays before the work even starts.*



Smart auto assignment hands you back the time, resources, and investment spent moving claims manually.

Automate ownership at 'claim created'

Auto assignment assigns the full claim file to the right adjuster based on claim-level attributes you define in custom profiles. Claim type, loss type, incident region, account type, and claim tags can all be assessed in the order of operations you designate, on the timing schedule you set. Individual exposures can be assigned separately so work moves to the right specialists without lost accountability over the full lifecycle.

Build logic based on your rules

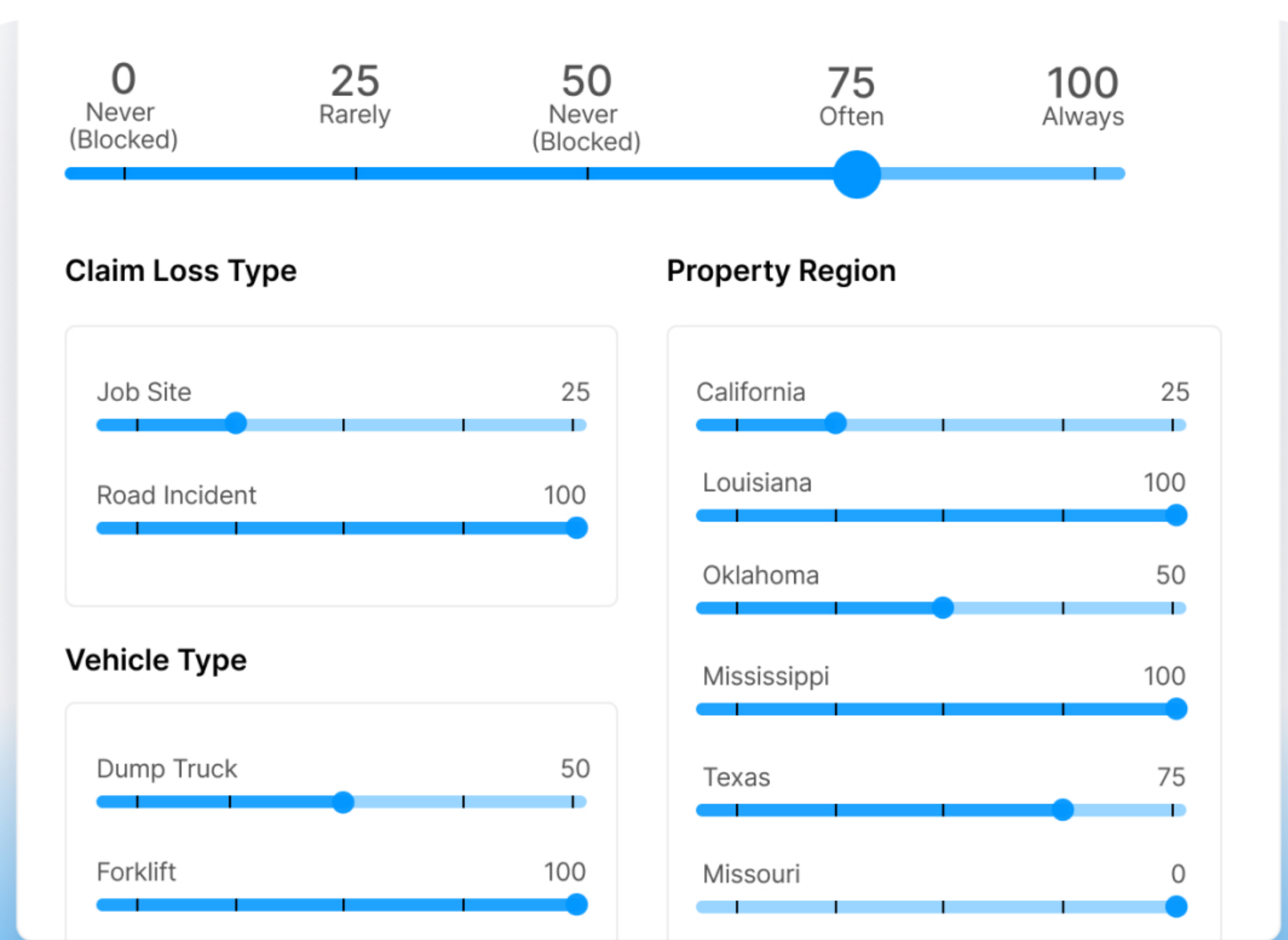
Capacity limits, single file ownership, claim types, loss type, tags, and location all determine who's eligible for what. Profiles can overlap claim, loss, and exposure types in a single configuration so every combination doesn't require a separate profile.

Enforce compliance before work starts

Auto assignment checks active licensing and jurisdiction, then confirms a territory match when required, so adjusters only receive work they're authorized, eligible, and equipped to handle.

Launch, iterate, and adjust without code

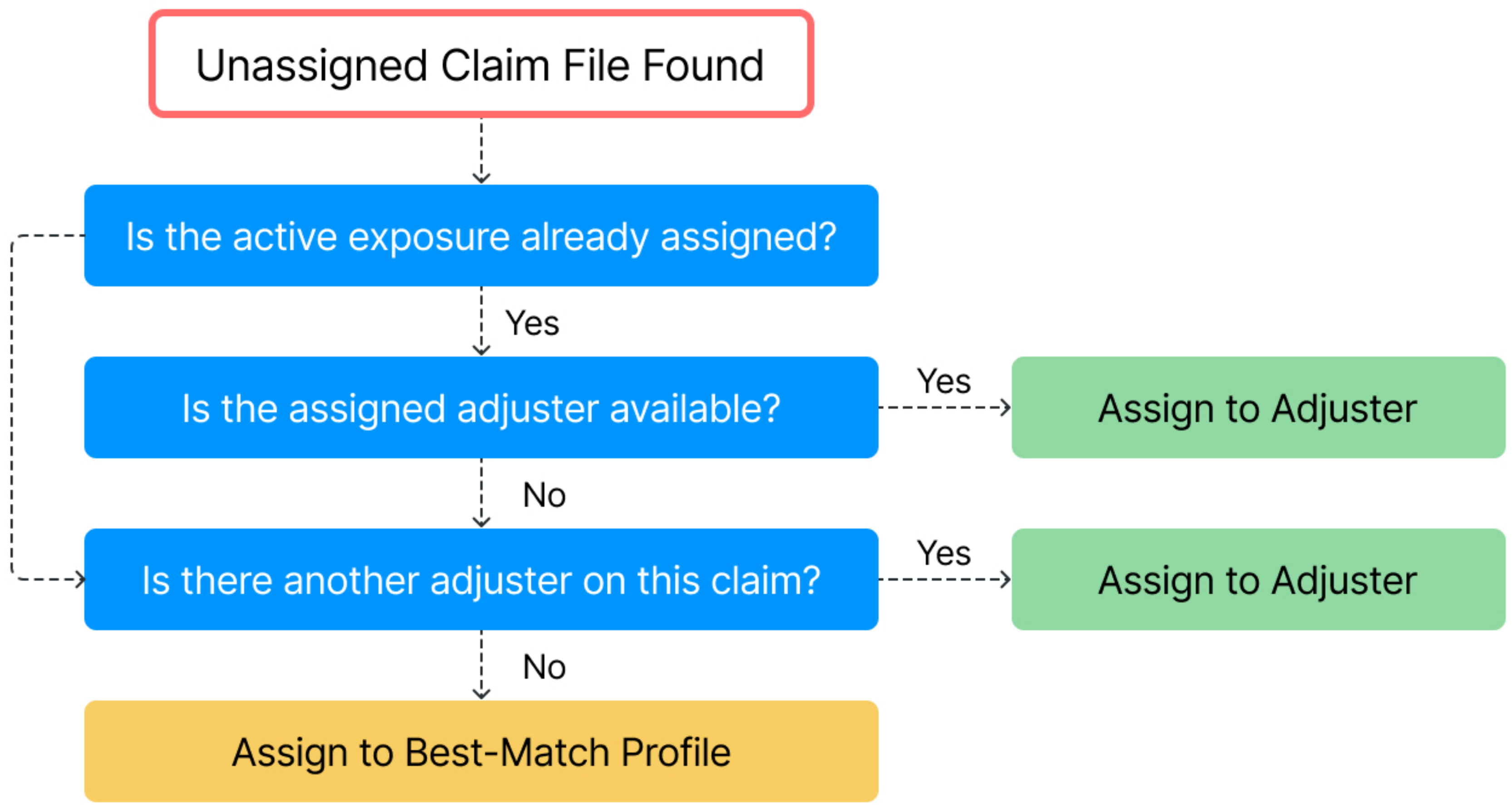
Changing how work gets routed doesn't need to require hours of back-end development. Cadence, territory definitions, license exempt regions, and individual profile status are all configurable directly in assignment management with visual logic trails and attribute hierarchy (25% weight to attribute A, 50% to attribute B).

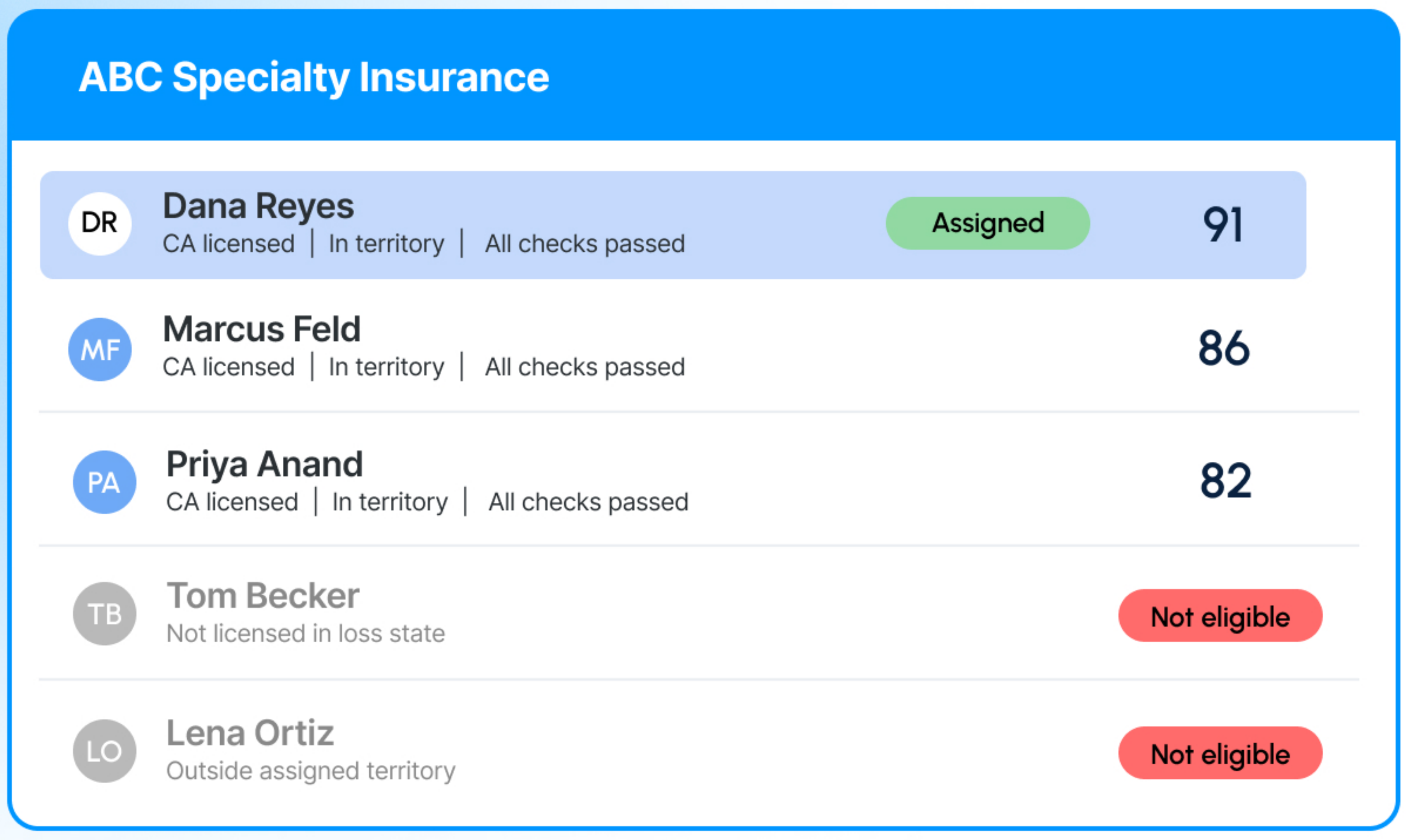


Continuity comes first

Profile match is the foundation, but not always the first move. Before auto assignment assesses a single profile, it checks for existing assignments across the claim's exposures and prioritizes people who already know the claim.

Exposures without active tasks that previously sat unassigned in non-priority queues are automatically (and accurately) routed so teams don't have to spin up tasks just to keep a claim moving.





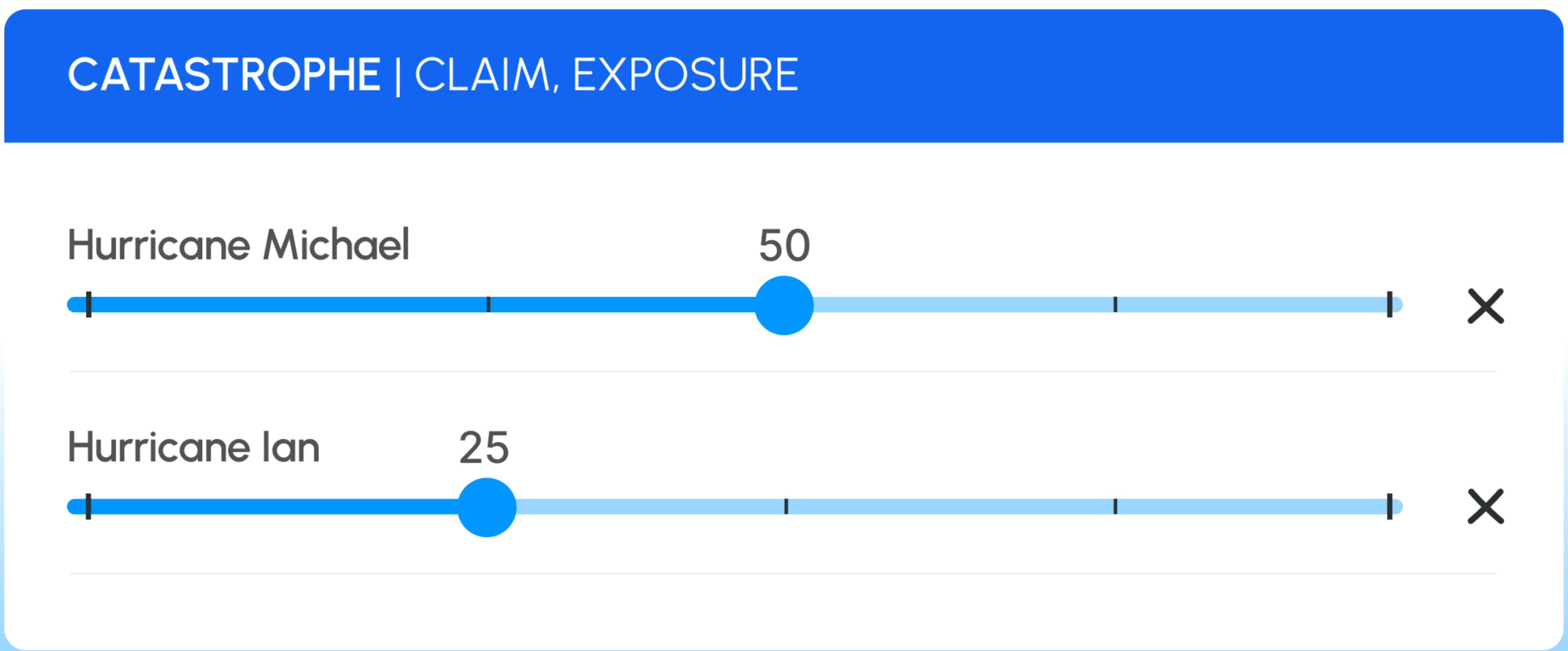
Only qualified adjusters are an option

Carriers have the option to disqualify any adjuster profiles that don't meet defined licensing and territory requirements for an assignment. Profiles that fail the required checks never enter the scoring queue to eliminate any risk that the top-scoring profile bypassed core compliance requirements.

Every check completed and score generated is tracked at the profile level so admins can see the outcome and logic for every assignment.

Specialized logic for specialty events

In high-priority scenarios like CAT events, dedicated logic and assignment rules can be triggered to applicable claims using the same process as territory setup. Claims can be tagged based on event attributes like PCS codes, date ranges, locations, and loss types so matched files route directly to the adjusters qualified to handle them.



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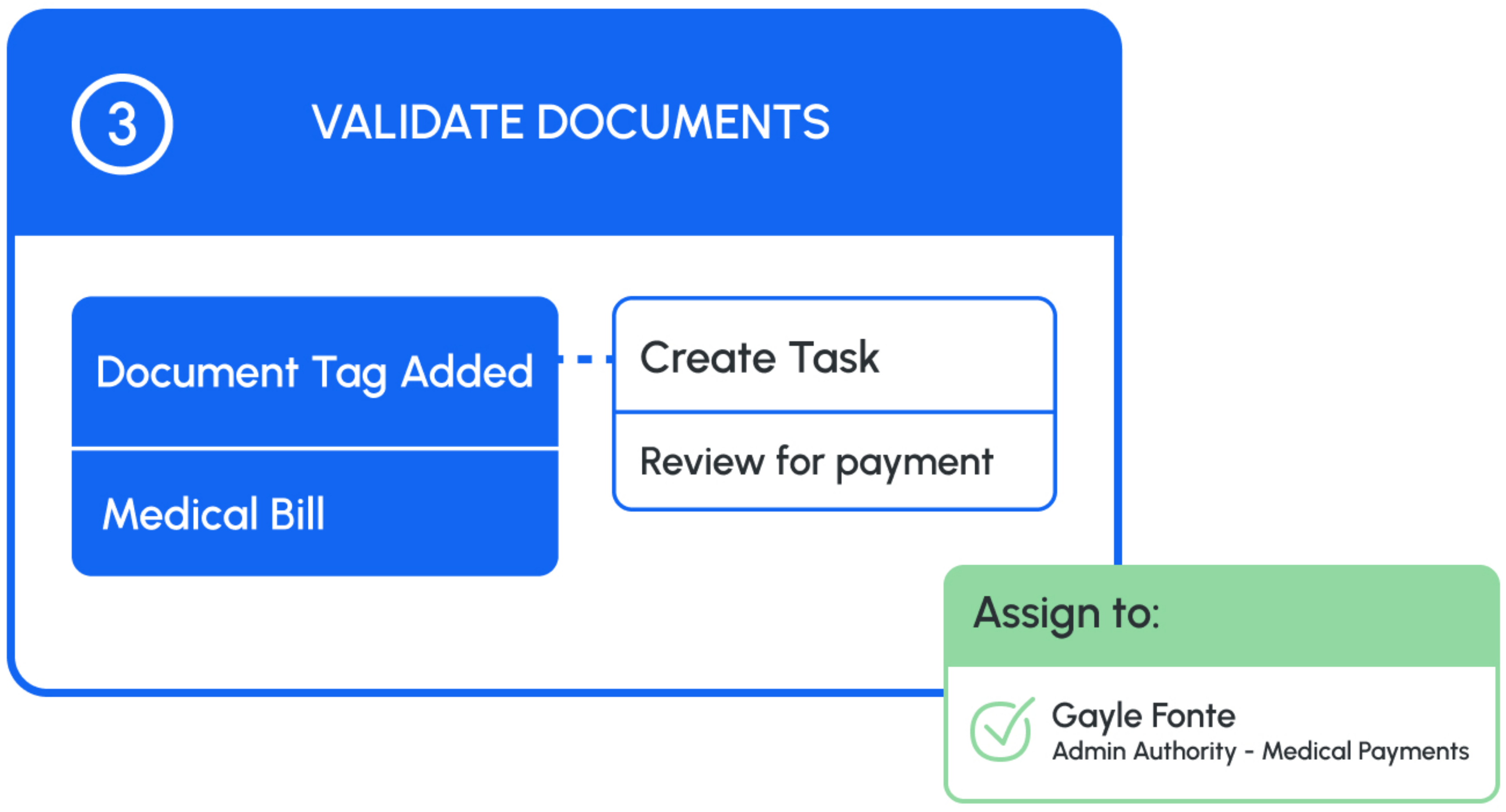


Account for the details in task orchestration

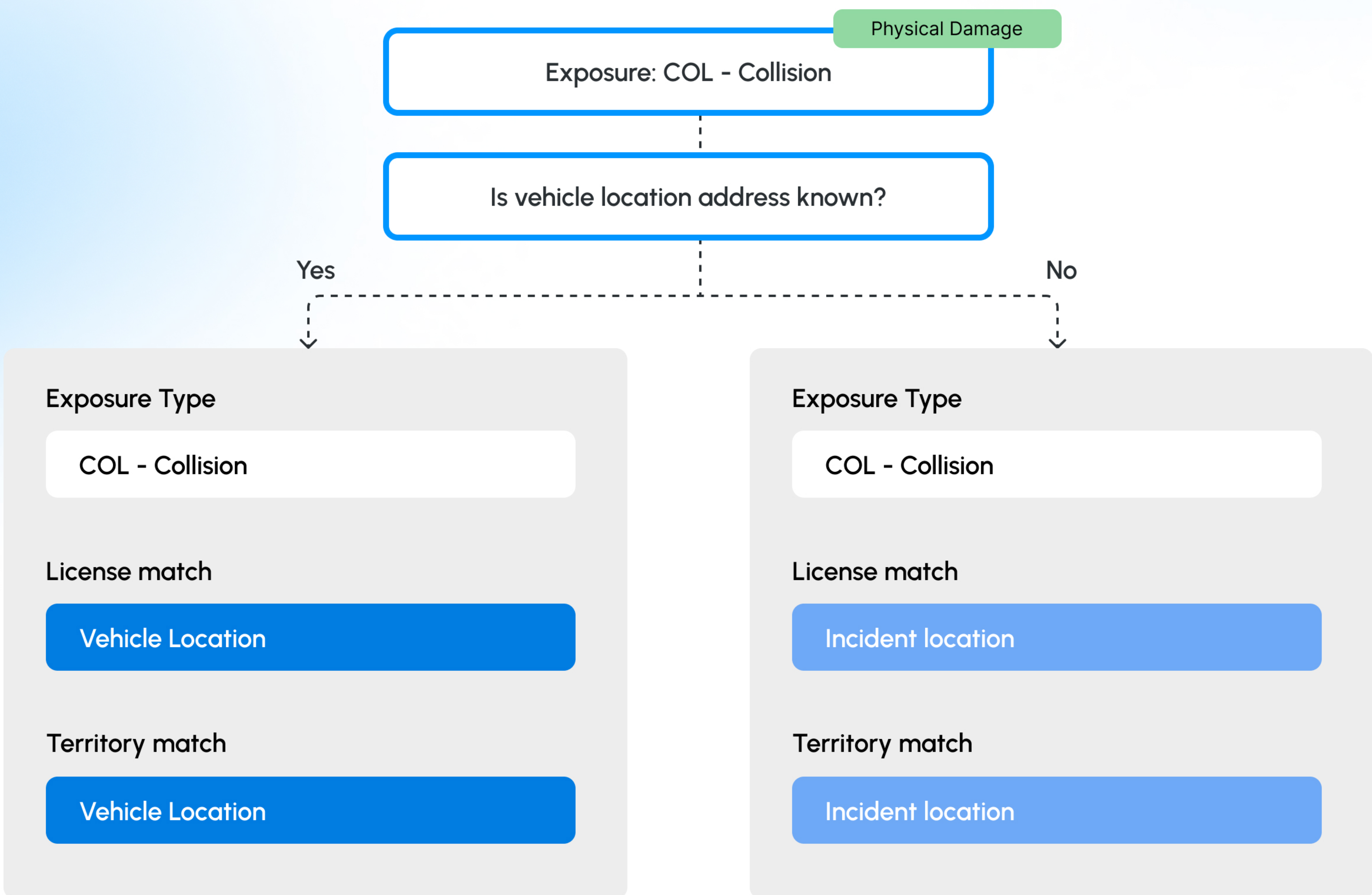
Tasks don't automatically inherit claim and exposure rules. Workflows can create and assign a task in the same step via assign-on-create, or auto assignment can route it through its hierarchy. Task-level rules can be defined to diverge on purpose, like routing review or approval tasks straight to the right authority so adjusters can skip manual forwarding.

Route physical damage work where the vehicle is located

Incident location doesn't always equate to vehicle location in auto claims, which makes it easy for physical damage claims to wind up in the wrong queues (and linked to the wrong territories).

With exposure-level rules, auto assignment checks licensing and territory requirements against both the vehicle location and the incident location, handling APD and liability exposures accurately without anyone manually catching and rerouting them.

Vehicle location takes priority whenever it's known, and incident location stays the fallback so claims never stall.



Built for the way claims work
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