# **RCT Express**

Administration Tools Guide

Version 4.x

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# **Administration Tools**

This guide covers the tasks associated with all of the administration tools within RCT. These tools are used to configure and define certain features and functions of the program.

Use the options on the Tools page to perform the various administrative tasks.

**Note:** The options available on the Tools menu are based on the options your company uses and what your user role allows you to access. The topics covered in this section are all of the options that may be available.

Access the administration tools by clicking **Tools** on the menu of the Dashboard.

CoreLogic' RCT Express®			
	То	ols 🔻 He	ip Log Out
Create New Valuation Condo/Co-Op Mobile-Manufactured Home Renters (Contents Only) Address, City, State, ZpCode Use Advanced	Administration Broadcast Message	•	
Address, City, Saler, 2pCode	Change My Information		
Find Existing Valuation	Configuration Settings		
Policy Number or Address or City or State or ZipCode	Manage Additional Fields		
Policy Number V Insured Name V Address V City V State/Province V Zip/Postal Up &	Manage Business Partners		
ESTIMATE-0000498     10248 Singing Wind PI     Las Vegas     NV     89134     //302015	Manage Underwriting Que Reassign Valuations	stions ቪ 🔒	×90
C H ← 1 10 → Page 1 of 1 → H	reassign valuations		ms 1 - 1 of 1
Tools menu			
Call (800)809 0017 for technical support.	62015 CoreLo	xgia, Ina. All righ	ts reserved.

(Note: The tools options shown depend upon user access configuration.)

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# Administration

Use the **Tools > Administration** settings to manage users and manage agencies.

Ind Existing Valuation Policy Number or Address or City or State or ZipCode Policy Number Insured Name Address City State/Province Z City State/Province S State/Provinc		Update Date	Change My Information Configuration Settings Manage Additional Fields Manage Business Partners		
		Date	Manage Business Partners		
G H < 3 10 - Page 1 of 1 → H		11/30/2015	Manage Underwriting Question Reassign Valuations	15 🗘 🧐 🗐 🕅	
	istration itures				

"Manage Users" on the next page

"Manage Agencies" on page 10

## Manage Users

In RCT, access to valuations and some of the functionality is controlled by user role. Each user role has permissions associated with it which grant access to functionality such as InterChange and Hazard lookups. The user role also determines whether or not the user has access to only their own valuations or if they can access valuations created by other users.

On a standard RCT site, there are generally four user roles with pre-defined access to valuations:

- Agents belong to an agency and can only view, search for, and update their own valuations.
- Agency Managers belong to an agency and can view, search for, and update all valuations belonging to themselves and agents in their Agency. An agency manager will not see valuations created by their agents unless they search for and open them.
- Underwriter does not belong to an agency and can view and update all valuations.
- Administrator does not belong to an agency and can view and update all valuations; can access the Tools Menu, and can initiate ExpressLync web service calls if available.

Additional user roles can be added with varying permissions if required.



Use **Tools > Administration > Manage Users** to find existing users, create new users, and edit or delete existing users.

Manage Users	Find a user			Dashboards ~ Tools ~ Help Log Out
Find User JDoe,Doe,Elkins Jones In	is. Agency, Inc.	Sear	ch	
Create User User	Name V User Role	T State/Province	Agency     Elkins Jones Ins. Agency, Inc.	Edit a user
Si H ← 1 10	Page 1 of 1 > H		Extris Jones Ins. Agency, Inc.	Displaying item/1 - 1 of 1
	Create a user		_	Delete a user

When you create a new user you will be assigning him or her to the appropriate user role which will determine their access.

#### To find an existing user:

- 1. In the **Find User** field enter the user last name, user ID, or agency and click **Search**. You can enter just a few characters instead of a complete name.
- 2. You can filter or sort the results that are displayed to make it easier to find the specific result you are looking for. The filter and sort features work the same as they do on the Valuation dashboard.

#### To create a new user:

1. Click Create User. The Create User and Agency Association window appears.

Create User			create a	user. Fields with an a (*) are required.	sterisk	
* User Role	Select					
* User ID:		Addres	S:			
* Password:		City:				
* Confirm Password:		State/P	rovince:		Pas	sword Requirements
LastName:		Zip/Pos	tal Code:			Password must be at least 1 characters long     Password must be less than 40 characters long
First Name:		Phone				
E-mail:		Fax				
Active:	1					
Password never expires:						
Agency Association		_	_			

- 2. Select a user role from the dropdown list.
- Define a user ID and password. (The User Role, User ID, and Password fields are required.) The password requirements displayed on the screen reflect the password settings your site administrator has selected for your site in Tools > Configuration Settings > Password Settings.
- 4. Complete the remaining (optional) fields.
- 5. To associate an agency for the user, enter an agency name in the Find Agency field and then select the desired agency and transfer it to the Associated Agencies list. Remember that not all user roles will allow an agency association.

		Dashboards - Tools - Help LogOut
Create User		
User Role Agent Agent Agency Association Agency Association Agency Association Agency Association Agency Association First Name User First Name Adhe First Name Adhe Adhe Adhe Adhe Adhe Adhe Adhe Adh	Address: msbsupport City: StateProvince: ZipPostal Code: Phone: Fax: Click > to association. Search A, Charleston, WV, 304	ser.

Normally you will only be allowed to associate the user with a single agency. However in some cases an RCT Express site may be configured to allow an user to belong to more than one agency. In that case, the agency association user interface will allow you to select multiple agencies to associate with the user.

6. Click Save.

### To edit an existing user:

1. Click the **Edit** icon next to the user you wish to edit.

	ige Users User								_		
JDo						Search	)		Click to		
Cre	ate User										Flear Filterin
	User ID	Y	Name 7	7	User Role 🌱	State/Province 1	Ζ.	Agency	Y	Status	A
	JDoe		John Doe		Agent			Elkins Jones Ins. Agency, Inc.		Active	Μ×
9	H 4 1 10		Page 1 of 1		H					Display	ing items 1 - 1 d

Edit User		Click to ec passwo			Dashboards 👻 Tools 👻 Help Log O
User Role User ID: Confirm Password: Last Name: First Name: E-mail: Adtive: Password never expires:	Agent JDce Doe John Z		iddress: Dity: State:Province: DipiPostal Code: Edit any	of the information on this screen.	Password Requirements  Password must be at least 1 characters long Password must be less than 40 characters long
Agency Associatio		p	Search	Associated Agencies	ncy, Inc., 12100 Wishire Blvd Ste 300, Los Angeles, CA, 31( ^

2. The Edit User and Agency Association window appears.

- 3. Make changes to any of the fields that you wish to edit. You can make a user inactive by deselecting the Active check box.
- 4. Change any agency associations if desired.
- 5. Click Save.

### To delete a user:

1. Click the **Delete**  $\times$  icon next to the user you wish to delete.

ana	ge Users			_		_						
ind U JDo								Search				delete the iser
_	ate User User ID		Name		User Role	Y	State/Province	*	Agency	*	Status	ar Filtering
	JDoe		John Doe	-	Agent		Staten rounde		Elkins Jones Ins. Agency, Inc.		Active	×
G	н к 1	0 -	Page 1	of 1	н						Display	ing items 1 - 1 of

2. The system will prompt you with an "Are you sure?" dialog before deleting. Click **Yes** to confirm your deletion.

**Important**: Be sure you want to delete a user and not just make the user inactive. If a user is inactive, you can still access all of their records. If a user is deleted, you can no longer

access their records, and must contact CoreLogic if it's necessary to retrieve those records.

## **Manage Agencies**

Use Tools > Administration > Manage Agencies to find existing agencies, create new agen-

cies, and edit or delete existing agencies.



Not all user roles are associated with agencies. In a typical RCT Express configuration only the Agency Manager and Agent user roles are associated with agencies. Admin and Underwriter user roles are not associated with agencies. RCT will only allow you to associate a user with an agency if the user role requires the association.

### To find an existing agency:

- In the Find Agency field enter the agency name, address, or ZIP code and click Search.
   You can enter just a few characters instead of a complete name.
- You can filter or sort the results that are displayed to make it easier to find the specific result you are looking for. The filter and sort features work the same as they do in the valuation dashboard.

### To create a new agency:

1. Click Create Agency. The Create Agency and User Association screen appears.

*Name:         Example Agency           Address:         1111 Main St           City:         Milwaukee           State/Province:         Will           Zip/Postal Code:         53202	reate Agency		Enter information in this dialog to create an agency. Fields with an	Dashboards - Tools - Hel	p LogU
	Address: City: State/Province: Phone: * = Required	1111 Main St Miwaukee Wi ZipiPostal Code: 53202	asterisk (*) are required.		
E user association	🛛 User Assoc	iation			

- 2. Define the agency. The Name field is required. The remaining fields are optional.
- 3. Associate users with the agency by searching for them using the Search field, then select a user and click the > arrow to assign them to the agency. Only users who have a user role which requires an agency association will be displayed in the search results. If the users for this agency have not been created yet, you will have an opportunity to create the agency association from the Create User menu option.

	Dashboards	-	Tools -	Help	Log Out
Create Agency					
Expand or contract the User Association information by clicking the + or - in the header * Ry to User Association • Ry to • User Association • Ry to • User Association	<i>i</i> .				
john Search					
674Hew, Robert Johnson, 118 3rd St Clarksdale MS       JDoe, John Doe,         1003New, Tna St, John Homer, 2340 N Green Acres Rd Ste 10 Fayettevill       JDoe, John Doe,         1064New, Myta Johnson, 111 E Glenn Ave Auburn AL       JDoe, John Doe,         1062New, Lune Johnson, 604 N Adams Rd Ste 201 Bioomfeid Hills MI       Image: Ste 201 Bioomfeid Hills MI         11052New, Joure Johnson, 500 Cleveland       Ste 201 Bioomfeid Hills MI         13622New, Charlets Johnson, 780 1 K ave S St.       Select a user         14758New, Zelos Johnson, 702 S Main St, Aberde       Ste 31 Ste Root Aver Ackdow rev         3914Mew, Ranae Johnson, 603 Southwest Dr Ste A Jonesboro AR       36107Mew, Lika, Johnson, 409 N Meet Ave, Charlet, SD.			×.		-
Exit without Saving			-	Save	

4. Click Save.

To edit an existing agency:

1. Click the **Edit** icon next to the agency you wish to edit.

							Dashi	boards	- Tools -	Help Log
lanage Agencies	_		_	_	_	-	_	_		_
los angeles Create Agency				Search					Click to edit agency	
Agency Name	Y	Address	Y C	v V	State/Province	Y	Zip/Postal Code	Y	Phone	
Elkins Jones Ins. Agency, Inc.		12100 Wilshire Blvd Ste 300	Lo	s Angeles	CA				3102079795	Μ×
t∰ H ← 1 10 - F	age 1	я́1 ≽ н							Displaying	items 1 - 1 of
										Close

2. The Edit Agency and User Association window appears.

			Dashboards 👻	Tools 👻 Help	Log Out
Edit Agency					
* Name: Address: City: State/Province:	Elkins Jones Ins. Agency. Il 12100 Wilshire Blvd Ste 300 Los Angeles CA Zip/Postal Code:	f the information on the screen.			
Phone:	3102079796				
* = Required  User Associa  Agency or User I		ed liters		_	
		12100 Wilshire Blvd Ste 300 Los Angel	les CA	×	
	Exit without Saving			Save	

- 3. Edit the agency information. The Name field is required. The remaining fields are optional.
- 4. Add or subtract users using the User Association search field and the < or > arrows.
- 5. Click Save.

### To delete an agency:

1. Click the **Delete**  $\times$  icon next to the agency you wish to delete.

anage Agencies						
ios angeles		Search			Click to dele agency	
Create Agency						ear Filtering
Agency Name	Y Address	T City T	State/Province 7	Zip/Postal Code 🌱	Phone	
Elkins Jones Ins. Agency, Inc.	12100 Wilshire Blvd Ste 300	Los Angeles	CA		3102079796	X
😘 x x 1 10 💌 Page	1 of 1 b H				Displaying it	tems 1 - 1 (

2. The system will prompt you with an "Are you sure?" dialog before deleting. Click **Yes** to confirm your deletion.

# **Broadcast Message**

Administrators can send a broadcast message to RCT users. The message appears on the RCT Express dashboard.

Example:

	CoreLogic RCT Express sage	Example	e of a broadcast nessage		-	-	-	
_	te New Valuation 🛛 Con	do/Co-Op 🗌 Mobile-M	anufactured Home		Create Valua	tion 🗌 Use Ad	Ivanced Entry	
Find	Existing Valuation							-
Po	licy Number or Address or City	or State or ZipCode		Se	earch			
	Policy Number	Insured Name 🌱	Address	Y	City 🍸	State/Province Y	Zip/Postal Code T	P
۲	ESTIMATE-0207995		1031 Oakwood Dr	1	Warminster	PA	18974	Ó
٠	ESTIMATE-0207987		14 Erin Way		Holden	MA	01520	C

#### To send a broadcast message:

1. From the Tools menu, select Broadcast Message.

		Dashboards - Tools - Help LogOut
Broadcast Message		
Broadcast Start Date 5/6/2013 Broadcast Message This is a test message. Enter the want the r to st	message want the message	Click to end the message immediately
Exit wit	ithout Saving	Stop Current Message Save

- 2. Click in the **Broadcast Start Date** field and use the calendar to select a start date.
- 3. Click in the Broadcast End Date field and use the calendar to select an end date.
- 4. Type your message in the Broadcast Message field.
- 5. Click Save.

Note: To remove a broadcast message before the broadcast end date, click **Stop Cur**rent Message.

# **Change My Information**

Use the Change My Information page to change your password or your email address.

Change your password by entering your old	Dashboards v Tools v Help LogOut
Change My Information password and then the new password.	
Old Password:	
New Password: Enter or chan	de
Confirm New Password: your email add	
Currently, there is no e-mail address associated with this count.	
E-mail Address:	
Default Language : English	
Exit without Sa language	Save

Change My Information is an option displayed to end users who log into RCT from a log-in screen. This option is not displayed to end users who are seamlessly transferred into RCT without passing through the log-in screen.

### To change your password:

- 1. From the Tools menu select Change My Information.
- 2. Enter your old password. (Passwords are case sensitive.)
- 3. Enter your new password. (The system will prompt you if your password does not meet password strength requirements.)
- 4. Re-enter your new password to confirm.
- 5. Click Save.

#### To change your email address:

- 1. Enter your new email address (your current email address is displayed above the field for the new address)
- 2. Click Save.

You can also select the default language, either English or French.

## **Configuration Settings**

Use **Tools** > **Configuration Settings** to define additional fields settings, contents valuation settings, cost data settings, Hail Insight<sup>™</sup> settings, InterChange settings, password-related settings (password options, password complexity options, and lockout options), roof age settings, and technical support information. The displayed options depends on your licensing and administration settings.

Configuration Settings	
+ Additional Fields Settings	
+ Contents Valuation Settings	
+ Cost Data Settings	
+ Hail Insight™ Settings	
+ InterChange Settings	
+ Password Settings	
+ Property Imagery Settings	
+ Roof Age Settings	
+ Technical Support Settings	
	Close

Each section of the various configuration settings is initially collapsed. Click the + icon next to the settings you wish to modify and it will expand, displaying all the parameters that you can edit. Note that only options licensed for the client site are displayed.

Close the Configuration Settings panel and return to the dashboard by clicking the **Close** button.

#### "Additional Fields Settings" on the next page

"Contents Valuation Settings" on page 18

"Cost Data Settings" on page 28

"Hail Insight™ Settings" on page 31

"InterChange Settings" on page 47

"Password Settings" on page 49

"Roof Age Settings" on page 53

"Technical Support Settings" on page 55

## **Additional Fields Settings**

To access this dialog go to the dashboard and select **Tools > Configuration Settings** and then click **+** next to **Additional Fields Settings**. Use this dialog to enable the feature and to enable additional fields for specific user roles.

Additional fields are client defined fields that can be used to pass through data that will not affect the calculation of reconstruction cost. Examples of how the additional fields can be used is for identifying a particular company or line of business that a valuation is being created for, or for passing cost accounting data that is used for billing back internal costs.

Additional fields can be enabled for specific user roles. When additional fields are used and displayed in a valuation, the information is included on the standard, detailed, and comparison reports. An administrator configures and manages additional fields. A user can view or enter information into the fields for a valuation (if their user role is enabled for this feature).

nfiguration Settings		
- Additional Fields Settings		
Enable Additional fields:		
Enable Additional fields for t	he following User Roles:	
User Role		
Administrator		
ADMLLPAdmin		
ADMMAINAdmin		
Agent		
Agent Manager		
Underwriter		
	Exit without Saving	

#### To enable additional fields:

- 1. To enable the feature, select the Enable Additional fields check box.
- Enable the feature for specific user roles by selecting the check box next to the desired user roles.
- Click Save. Click the icon to collapse the Additional Fields settings. Click Close to close the Configuration Settings dialog and return to the dashboard.

## **Contents Valuation Settings**

To access this dialog select **Tools > Configuration Settings** and click the **+** to expand the **Contents Valuation Settings** dialog.

**Note:** This is a separately licensed service. This option will not be displayed on sites that do not have a Contents Valuation license.

Use this dialog to create an informational RCT Alert. Alerts are defined based upon rules that you configure. You can also define the alert message that appears (both English and French) and make specific rules either Active or Inactive. User roles must be enabled to receive alerts.

When the rule you created is true, the defined message appears in the RCT Alerts panel.

Note: The alert generated in RCT Alerts will be a "green" information only alert.

Configuration Settings		
+ Additional Fields Settings		
- Contents Valuation Setting	S	
Contents Site Level Sett	ings	
Standard Contents Covera	age %:	1
Require household income valuation:	e level input to get a contents	
Display the household inco and reports:	ome disclaimer note on screens	8
Display the estimated hou contents valuation on scre	sehold income used to create the eens and reports:	
Contents Display on Repo	rts:	◎ Category Only ⑧ Category and Sub-category
Enable contents alerts for t	the following user roles:	
User Role		
adjustifier	۲	
Administrator		
Agency Admin	۲	
Agency Manager	2	

#### To define the contents valuation:

- In the Standard Contents Coverage % field, enter the desired percentage of reconstruction cost that must be exceeded for an alert to be displayed.
- 2. Select **Require household income level input to get a contents valuation** if you want to require income level. Household income level is optional.

- 3. Select **Display the household income disclaimer note on screens and reports** if you want to have a disclaimer appear.
- 4. Select Display the estimated household income used to create the contents valuation on screens and reports if you want to display the estimated income that is used to create the valuation on various screens and reports. If you do not want the income level displayed, uncheck the box.
- 5. Select either **Category Only** or **Category and Sub-Category** for the level of detail to be displayed on reports and the contents valuation screen.
- 6. Click Save.
- 7. Click **Close** to close the Configuration Settings and return to the dashboard.

Use the chart below to determine what will be displayed when using the two "Display..." parameters.

Display the house- hold income dis- claimer note on screens and reports	Display the estim- ated household income used to cre- ate the contents valu- ation on screens and reports	Result
On	Off	"Note: Contents estimate based on a default income level range" (The income level is not shown)
On	On	"Note: Contents estimate based on a household income of 46,000 to 75,000" (The income level displayed will be whatever was selected on the contents valuation dia- log)
Off	Off	No display
Off	On	No display

For a homeowners valuation the disclaimer (when enabled) will appear on reports that show the details of a contents valuation and on the Valuation Totals screen below the contents valuation

details when "more info" is selected. The contents estimate results will be displayed in the Standard, Detail, and Home Owner reports.

For a renters (contents only) valuation the disclaimer note (when enabled) will appear on the contents report.

#### **User Roles**

Enable contents alerts for specific user roles by selecting the check box next to the user roles you want to enable.

<ul> <li>Contents Valuation Settings</li> </ul>		
Contents Site Level Setting	IS	
Standard Contents Coverage	%:	1
Require household income le valuation:	vel input to get a contents	
Display the household incom and reports:	e disclaimer note on screens	
Display the estimated house contents valuation on screen		
Contents Display on Reports		egory Only
Enable contents alerts for the	following user roler	
adjustifier		
Administrator	V	
Agency Admin		
Agency Manager	V	

#### **Manage Contents Alerts**

You can create new alerts and edit existing alerts by selecting the appropriate link.

Manage Contents Alerts Click to create a Create Contents Alert Click to create a Cli							
Contents Rule Name	English Alert Message	French Alert Message	Click to edit an	Rule Code	Options		
PersonalPapersAndRecords_GT_100	Personal papers and records greater 100	Personal papers and records greater 100	existing alert	CAUUIU	- 🗹		
Artwork and Collectible gt 1000	Artwork and Collectible gt 1000	Artwork and Collectible gt 1000	Active	CA0008	2		

#### **Creating a Contents Alert**

Contents alerts can be created based on different conditions. If the defined conditions are met in the valuation and the alert is active, an alert message is displayed in the RCT Alerts panel.

You can compare multiple items in one rule by using "and" and "or" conditions.

Note: The alert generated in RCT Alerts will be a "green" information only alert.

How to create a contents alert:

## Step 1

We'll create an example rule that states:

"If the value of artwork and collectibles exceeds \$1000 then display an alert message."

To create a new Contents Alert, click Create Contents Alert.

Manage Contents Alerts		
Create Contents Alert		2
Contents Rule Nan Click to create a	English Alert Message	Fre
PersonalPapersAndRe new alert	Personal papers and records greater 100	Pers

The Edit Rule screen will open.

Select **Contents Only**, **Homeowners Only** or **Both** for this rule. This determines when this rule is in effect. If Contents Only is selected, the rule will be in effect only for Renters (contents only) valuations. If Homeowners Only is selected, the rule will be in effect only for Homeowners valuations. If Both is selected, the rule will be in effect for both renters and homeowners valuations.

Enter a **Contents Rule Name** and an **English Alert Message**. (You can also enter a French alert message)

Select the Active check box to make the rule active.

To start defining the rule, click in the blue shaded area.

-	Contents	Val	luation	Setti	ings
---	----------	-----	---------	-------	------

Edit Rule	
Contents Only O Hor	meowners Only 🖲 Both
* Contents Rule Name	Artwork and Collectible > 1000
English Alert Message	Artwork and Collectible value may exceed 1000. Please revie
French Alert Message	
Active	Click in this area to
Click inside of the Rule A	rea to begin a new rule
- click here to begin a ne	ew rule -

The "If" statement appears along with a drop down list of selections.

For our example, we will select **Contents Category**.

-	Contents Valuation Setting	S
	Edit Rule	
	○ Contents Only ○ Hor	neowners Only 🖲 Both
	* Contents Rule Name	Artwork and Collectible > 1000
	* English Alert Message	Artwork and Collectible value may exceed This field displays
	French Alert Message	Instructions on what to do next
	Active	
	Select a field or parenthe	esis from the menu; hit space bar to display dropdown selections
	If	
	Contents Category Contents Sub-Category	Exit without Saving

After we selected Contents Category, a drop down list of categories appears.

We'll select "Artwork and Collectibles" for our example.

-	<ul> <li>Contents Valuation Settings</li> </ul>						
	Edit Rule						
	○ Contents Only ○ Hor	neowners Only 🖲 Both					
	* Contents Rule Name	Artwork and Collectible > 1000					
	English Alert Message     Artwork and Collectible value may exceed 1000. Please revi						
	French Alert Message						
	Active						
	Type or select the param	eter's value; hit space bar to display dropdown selections					
	If Contents Category	0					
		Apparel - Boy Apparel - Girl Apparel - Infant and Toddler Apparel - Men					
+	Hail Event Risk Settings	Apparel - Women					
+	InterChange Settings	Appliances Artwork and Collectible					
+	Password Settings	Auto Parts and Supplies Boats, Watercraft and Accessories					

A set of comparison operators appears. We'll select "is greater than" for our example.

- Contents Valuation Settings

Edit Rule	
$\odot$ Contents Only $\odot$ Ho	meowners Only 🖲 Both
Contents Rule Name	Artwork and Collectible > 1000
English Alert Message	Artwork and Collectible value may exceed 1000. Please revie
French Alert Message	
Active	
Select an operator from	the menu; hit space bar to display dropdown selections
If Contents Category	( Artwork and Collectible)
	is equal to
	Exit withou is not equal to
Hail Event Risk Settings	is greater than or equal to is less than
InterChange Settings	is less than or equal to

### We'll enter 1000 between the brackets.

- Contents Valuation Settings

Edit Rule	
Contents Only	meowners Only 🖲 Both
* Contents Rule Name	Artwork and Collectible > 1000
English Alert Message	Artwork and Collectible value may exceed 1000. Please revie
French Alert Message	
Active	
Type the value; use Back	space to delete, Enter, or Right Arrow to complete
If Contents Category	( Artwork and Collectible ) is greater than $[100\overline{4}]$

Our rule is complete. Click anywhere outside the blue area and then be sure to click **Save**.

_	Contents	Valuation	Setting	S

Edit Rule		
◎ Contents Only ◎ Ho	meowners Only 🖲 Both	
* Contents Rule Name	Artwork and Collectible > 1000	
* English Alert Message	Artwork and Collectible value may exc	ceed 1000. Please revie
French Alert Message		
Active		Click Save when done
Click anywhere inside of	the Rule Area to modify the rule	
If Contents Category	( Artwork and Collectible ) is greater that	an [1000]
Ex	it without Saving	Save

If you want to modify the rule, click anywhere inside the rule.

## **Cost Data Settings**

The RCT quarterly cost data updates can be scheduled by going to **Tools > Configuration Set**tings > Cost Data Settings.

The screen shows the currently installed cost data set and the newest available set, as well as a table of completed and pending updates.

### To schedule an update:

- 1. Enter a planned date for the update.
- 2. Enter the planned time. Time can be selected in 30 minute increments.
- Select the users that you want to be notified of the update. (The list shows all Admin users on the site). Notifications will be sent to selected users when a new cost data update is scheduled, cancelled, or successfully completed.
- Click Schedule Update. The update will now be shown in the table as Pending. Once the update takes place, it will show in the table as Completed.

**Note:** If you don't want to manually schedule updates, you can have CoreLogic configure the updates to occur automatically. The table will show all pending and completed updates.

Contents Valuation S Cost Data Settings	This is the new of data that is avail to be schedule	lable		is the currently alled cost data		
Schedule Cost Data Cost Data Set Planned Date Planned Time User(s) to be Notifie	Q3 2016     U1/24/2016     9 ♥ 30 ♥ AM ♥ ET	you want the cost	to be notified when t data is updated	Cost Data Set: Q Effective Date: 1 Effective Time: 0 Created By: C	2 2016 0/21/2016	in
	Select All msbsupport(abc@core	elogic.com)				
			actors, CoreLogic strongly encoura latest cost model do so at their ow			
Cost data update	ing values are based on the mos				The tabl comp	latest cost mode e shows the leted and ed updates
Cost data update	ing values are based on the mor available. Clients who choose no				The tabl comp	e shows the leted and
Cost data update To ensure that buildi soon as it becomes a Scheduled and His	ing values are based on the mos available. Clients who choose no torical Cost Updates	ot to update to the	latest cost model do so at their ow	n risk.	The tabl comp schedul	e shows the leted and
Cost data update To ensure that buildi soon as it becomes a Scheduled and Hisi Cost Data Set	ing values are based on the mor available. Clients who choose no torical Cost Updates Scheduled Date/Time	ot to update to the	latest cost model do so at their ow Created Date/Time	n risk. Status	The tabl comp schedul	e shows the leted and
Cost data update To ensure that buildi soon as it becomes a Scheduled and His Cost Data Set Q2 2016	ing values are based on the mor available. Clients who choose no torical Cost Updates Scheduled Date/Time 10/21/2016 01:30 AM ET	ot to update to the	Created Date/Time 10/20/2016 07:22:19 PM ET	n risk. Status Complete	The tabl comp schedul	e shows the leted and

### To cancel a pending update:

- Click the Cancel Update button under the currently scheduled update planned date and time. Or in the table click the X under Actions for the pending update that you want to cancel.
- An "Are you sure?" dialog will appear. Click Yes to cancel the update or No if you do not want to cancel the update.
- A cancelled update can then be rescheduled. Selected users are notified of the cancelled update.

Cost Data Settings Schedule Cost Dat Cost Data Set Planned Date Planned Time User(s) to be Notifi	: Q3 2016 : 10/24/2016 : 11 • 30 • AM • ET	This update is cu scheduled. The P Date field is graye	fanned co ed out. co E	urrent Cost D ost Data Set: ffective Date: ffective Time: reated By:	Q2 2016 10/21/2016	
Click Cancel Updat update. You can the cost data update to time	n reschedule the port(abc@core a new date and	logic.com)			cancelled by d Actions or by	bending but can be licking the X under clicking the Cancel ite button
soon as it becomes			actors, CoreLogic strongly encoura atest cost model do so at their ow		o update to	atest cost model as
Cost Data Set	Scheduled Date/Time	Created By	Created Date/Time	Status	Actions	
Q3 2016	10/24/2016 01:00 PM ET		10/24/2016 10:55:48 AM ET	Pending	×	

Only one cost data update at a time can be pending.

## Hail Insight<sup>™</sup> Settings

To access this dialog select **Tools > Configuration Settings** and click the + to expand the **Hail** Insight<sup>™</sup> Settings dialog.

Hail Insight alerts are triggered based on threshold rule sets. Rules sets consist of an alert name, the alert message to be displayed, and defined conditions based on hail damage risk score, roof age, roof cover material or groups of materials, home age, and hail event window days. An alert can be based on a single condition or a combination of conditions. Rules can be active or inactive once they are defined. User roles must be enabled to receive alerts.

#### **User Roles**

Enable hail event risk alerts for specific user roles by selecting the check box next to the user roles you want to enable.

View additional hail event diameter details by selecting the **Enable Expanded Details** check box.



#### Manage Roof Cover Groups

Roof cover groups can be created that contain multiple roof cover materials. The event alert can then reference a group instead of having to reference many individual materials.

Manage Roof Cover Groups	lick to create a		_
Create Roof Cover Groups	new group		
Roof Cover Group Name	Click to edit	an <b>L</b>	Options
Aluminum Group	existing gro	up	-2

#### Example:

In the example below, a group was created called "High Hail Risk Roof Group". The desired roof cover materials were added to the group.

- Hail Insight™ Settings	Click to add a selected	
* Roof Cover Group Name: High Hail Risk Roof Gro	A methodal to the menu	
Roof Cover Group Options	Selected Roof Covers	
Rolled Metal Roofing Rolled Roof/Single Ply Rubber Shakes, Victorian Scalloped Shingles, Aluminum Shingles, Asphalt/Fiberglass, Irregular Pattern	Fiberglass, Translucent Panel Glass/Greenhouse Shakes, Wood Shingles, Architectural Shingles, Asphalt/Fiberglass	
Exit without S	Click to remove a selected material from	Save

Add or remove materials from the group by selecting the material and clicking the appropriate arrow. When you're finished defining the group, click **Save**.

Groups you've created can now be used when defining the hail event alerts. In the examples below, we'll use a group called the High Hail Risk Roof Group. This group would consist of all the roof cover materials that you have defined as being "high risk" to hail events. You could then check to see if the roof cover material defined in the valuation is included in that group.

Note that you do not have to define groups. Rules can be created that will check a single material. However, if you want to check more than a single roof cover material, it is easier to create a group containing them all.
#### Manage Hail Event Alerts

Hail event alerts can be created based on different conditions. If the defined conditions are met in the valuation and the alert is active, an alert message is displayed in the RCT Alerts panel.

The items that can be used in a rule are:

- Hail Event Risk Score: This score (0-10) indicates the risk of a hail event. You can define a rule specifying a score for comparison. For example, you could create a rule that says "If Hail Event Risk Score is greater than or equal to 7".
- Hail Event Window Days: This is the number of days since the last hail event. You can define a rule to check if a hail event has occurred within a specified time period. For example, you could create a rule that says "If Hail Event Window Days is less than 30".
- Roof Age: This is the roof age (as shown on the Building Information panel). You can
  define a rule that compares roof age. For example, you could create a rule that says "If
  Roof Age is greater than 20".
- **Roof Cover Group**: This is a group of roof cover materials that you have previously defined, specifying which roof materials are included in the group. You can define a rule to check if the roof material specified in the valuation is in the group.
- Roof Cover Material: You can define a rule that checks for a single roof material. For example, "Roof Cover Material is Copper".
- Home Age: This is the age of the home based on the Year Built for the main home.

You can compare multiple items in one rule by using "and" and "or" conditions. For example, you could create a rule that checks "If roof age is greater than 20 *and* the roof cover material is copper".

Another example of a rule is: "If the roof age is greater than 20 years and the roof cover material is in the high hail risk group then display an alert message".

Example of creating this rule:

## Step 1

We'll create an example rule that states: "If the roof age is greater than 20 years and the roof cover material is in the high hail risk group then display an alert message."

# To create a hail event alert, click Create Hail Event Alerts

Manage Hail Insight™ Alerts Create Hail Insight™ Alerts				
Hail Insight™ Rule Name	English Alert Message	French Ale		
Inspect before bind	Pre-existing roof damage inspection required before binding	Pre-existin required be		
Old Roof Depreciation	Roofs greater than 20 years require the depreciated value option	Roofs greated		

The Edit Rule screen will open.

Enter a **Hail Insight Rule Name** and an **English Alert Message**. (You can also enter a French alert message)

Select the Active check box to make the rule active.

To start defining the rule, click in the blue shaded area.

Edit Rule		
* Hail Insight™ Rule Name	Old Roof Depreciation	
* English Alert Message	Roofs greater than 20 years req	uire the depreciated value o
French Alert Message	Roofs greater than 20 years req	
Active	•	Click in this area to begin a new rule
Click inside of the Rule A	rea to begin a new rule	
- click here to begin a ne	ew rule -	
	Exit without Saving	

The "**If**" statement appears along with a drop down list of selections. For our example, we will select **Roof Age**.

Edit Rule		
* Hail Insight™ Rule Na	ame Old Roof Depreciation	
* English Alert Message	Roofs greater than 20 years require the instructions on what to do	
French Alert Message	Roofs greater than 20 years require e next	
Active		
Select a field or parenthesis from the menu; hit space bar to display dropdown selection		
If		
( Hail Event Risk Score Hail Event Window D Roof Age	Exit without Saving	
Inter( Roof Cover Group		
• Passw Home Age		

After we selected Roof Age, a drop down list of operators appears. We'll select **"is greater than"** for our example.

- Hail Insight™ Settings					
Edit Rule					
* Hail Insight™ Rule Name					
* English Alert Message	Roofs greater than 20 years require the depreciated value (				
French Alert Message	Roofs greater than 20 years require the depreciated value of				
Active					
Select an operator from	the menu; hit space bar to display dropdown selections				
If Roof Age					
is equal to					
is not equa	ine finehoute burning				
is greater t					
	nan or equal to				
+ InterChange Set is less than					
+ Password Setting is null	or equal to				
+ Roof Age Setting is not null					

A set of empty brackets appears where you can type the number of years for the roof age comparison. We typed "**20**" so now our rule says "If Roof Age is greater than 20". Pressing the right arrow key will make a drop down appear for our next part of the rule. We also want to check to see if the roof cover material is in the High Hail Risk Roof group, so we'll select the "**And**" statement.

-	Hail Insight™ Settings			
	Edit Rule			
	* Hail Insight™ Rule Name	Old Roof Depreciation		
	* English Alert Message	Roofs greater than 20 years require the depreciated value $\varsigma$		
	French Alert Message	Roofs greater than 20 years require the depreciated value $\varsigma$		
	Active			
	Use Left Arrow to edit the	e value; hit Space Bar and select a field to continue		
	If Roof Age is greater t	han [20]		
		or without Saving		

After the "And" statement, we'll select the "Roof Cover Group".

Edit Rule			
* Hail Insight™ Rule Nam	Old Roof Depreciation		
* English Alert Message	Roofs greater than 20 years require the depreciated value (		
French Alert Message	Roofs greater than 20 years require the depreciated value (		
Active			
Roof Cover Group If Roof Age is greater	than [20] and		
	( Ex Hail Event Risk Score Hail Event Window Days Roof Age		
InterChange Settings	Roof Cover Group		
Password Settings	Roof Cover Material Home Age		

We want to see if the roof cover material used on the home is in the **High Hail Risk Roof Group** so we'll select the "in" statement.

Edit Rule			
* Hail Insight™ Rule NameOld Roof Depreciation			
* English Alert Message	Roofs greater than 20 years require the depreciated value 🤇		
French Alert Message	Roofs greater than 20 years require the depreciated value (		
Active			
Select an operator from the menu; hit space bar to display dropdown selections			
If Roof Age is greater than [20] and Roof Cover Group			
	Exit without Saving is null		
	is not null		

Clicking the right arrow key on the keyboard brings up the list of roof cover groups. We'll select the **"High Hail Risk Roof Group"**. This group was created under the Manage Roof Cover Groups section of the dialog.

Edit Rule			
* Hail Insight™ Rule Nam	eOld Roof Depreciation		
* English Alert Message	Roofs greater than 20 years require the depreciated value o		
French Alert Message	Roofs greater than 20 years require the depreciated value o		
Active			
Hit Space Bar to insert a new value; use Right Arrow to edit existing value			
If Roof Age is greater than [20] and Roof Cover Group in			
	Exit without Saving		

Now we have our complete rule. Click outside the blue shaded area to complete the editing of the rule.

- Hail Insight™ Settings

# Edit Rule

* Hail Insight™ Rule NameOld Roof Depreciation			
* English Alert Message	Roofs greater than 20 years require the depreciated value $\mathfrak{c}$		
French Alert Message	Roofs greater than 20 years require the depreciated value $\mathfrak c$		
Active	✓		
Click anywhere inside of the Rule Area to modify the rule			

If Roof Age is greater than [20] and Roof Cover Group in High Hail Risk Roof Group

### After creating or editing a rule, be sure to click **Save**.

- Hail Insight™ Settings

Edit Rule				
* Hail Insight™ Rule Nam	eOld Roof Depreciation			
* English Alert Message	Roofs greater than 20 years require the depreciated After creating or editing			
French Alert Message	Roofs greater than 20 years require the depreciated the rule, be sure to click <b>S</b>			
Active				
Click anywhere inside of the Rule Area to modify the rule				
If Roof Age is greater than [20] and Roof Cover Group in High Hail Risk Roof Group				
E	kit without Saving Save			

Note: The alert generated in RCT Alerts will be a "green" information only alert.

Example of a hail event risk alert displayed in the RCT Alerts panel:



Another example of a rule is shown below:

#### - Hail Insight™ Settings

* Hail Insight™ Rule Nam	Inspect before bind	
* English Alert Message	Pre-existing roof damage inspection required before binding	
French Alert Message	Pre-existing roof damage inspection required before binding	
Active		
Click anywhere inside of the Rule Area to modify the rule		

This rule will check if the roof cover material for the property is in the High Hail Risk Roof Group and if the Hail Event Risk Score is greater than 7. If so, then the message "Pre-existing roof damage inspection required before binding" will be displayed in the RCT Alerts panel.

**Note:** If the style of the home is set to "Condo" then the hail event rule sets will not trigger.

The Hazard Summary panel lets you display the specific Hail Insight details.

Example:

Hazard Summary	φ	p	×
Geospatial Information			
Earthquake Fault			
Earthquake Risk			
ESA			
Fire Protection			
Fire Protection Extended			
Flood			
Hail			
Hail Insight™			
Proximity to Wildland			
Wildfire			
Wildfire Risk Score			

Click **Hail Insight** to display the detailed information. You can view either standard information or an expanded view, depending on the setting you have configured. Select the **Enable Expanded Details** check box located beneath the User Roles to enable an expanded level of information.

Example of standard view:

lazard Descriptions: Hail Insight™	
Hail Event Risk Score	0
Hail Events less than 2.00"	0
Hail Events greater than or equal to 2.00"	0
Most Recent Hail Event Date	07/15/2012
Largest Hail Event Date	07/15/2012
Note: Hail sizes being reported start at 0.75"	

Example of the expanded view which includes additional details for the hail event diameters:

Hail Event Risk Score	0
Hail Events less than 2.00"	0
Hail Events greater than or equal to 2.00"	0
Most Recent Hail Event Date	07/15/2012
Most Recent Maximum Diameter in Inches At Point	
Most Recent Maximum Diameter in Inches (1 Mile Radius)	1.2
Most Recent Maximum Diameter in Inches (3 Mile Radius)	1.3
Most Recent Maximum Diameter in Inches (10 Mile Radius)	1.3
Largest Hail Event Date	07/15/2012
Largest Maximum Diameter in Inches At Point	
Largest Maximum Diameter in Inches (1 Mile Radius)	1.2
Largest Maximum Diameter in Inches (3 Mile Radius)	1.3
Largest Maximum Diameter in Inches (10 Mile Radius)	1.3
Note: Hail sizes being reported start at 0.75"	

# **InterChange Settings**

**Note:** InterChange is used for addresses in the United States. Property Pre-Fill is used for Canadian addresses.

To access this dialog select **Tools > Configuration Settings** and then click **+** next to **Inter-Change Settings** to expand the dialog.

For addresses in the United States use this dialog to enable or disable the display of InterChange confidence scores for specific user roles and to define the score alerts. The confidence scores are displayed on the Building Information Panel and the Overall Score is displayed on the Building Information Panel and the Overall Score is displayed on the Building Information Panel and the Coverall Score is displayed on the Building Information Panel and the Overall Score is displayed on the Building Information Panel and the Overall Score is displayed on the Building Information Panel and the Overall Score is displayed on the Building Information Panel and the Overall Score is displayed on the Building Information Summary for any user role that is checked.

If values are selected for the RCT Alert messages, the alerts will be displayed for any user role that has the InterChange confidence scores enabled.

**Note:** Property Pre-Fill does not use Confidence scores. They are only active for U.S. addresses.

Cor	figuration Settings			
001	nguration octango			
+	Additional Fields Settings			
+	Contents Valuation Settings			
-	InterChange Settings			
	Enable display of InterChange Co	onfidence Score for the following User Roles:		
	User Role			
	Administrator	V		
	Agent	V		
	Agent Manager	V		
	Underwriter			
	InterChange Confidence Score	e Alerts n the InterChange confidence scores are lowe	r than the selected values:	
	Overall Score	High 💌		
	Total Living Area Score	None		
	Year Built Score	None 💌		
	Number of Stories Score	None		
		Exit without Saving	1	Save
+	Password Settings			
+	Roof Age Settings			
+	Technical Support Settings			
				Close

## To define InterChange settings:

- 1. Enable the display of InterChange confidence scores for specific user roles by checking the box next to the user roles. You can select multiple roles.
- 2. Define InterChange confidence score alerts for each score by using the drop down menus next to each score type. Select from None, Low, Medium, or High. An alert will be displayed in the RCT Alerts panel when a score is lower than the selected value.
- 3. Click **Save**. Click the icon to collapse the InterChange settings. Click **Close** to close the Configuration Settings dialog and return to the dashboard.

# **Password Settings**

Use the following settings to configure password security. To access this dialog, click **Tools > Configuration Settings** and then click **+** to expand the **Password Settings**. When finished making changes click **Save**.

#### **Password Options:**

Minimum pass- word length	This setting determines the minimum number of characters that a user's pass- word must contain. The minimum password length is 1 and the maximum is 40.			
	Listed below are suggestions for setting this feature based on the level of security desired.			
	Low: 1			
	Medium: 6			
	High: 8			
Password history - times before password reuse	This setting determines the number of unique new passwords that can be associated with a user account before an old password can be reused. This value must be between 1 and 100. Use 0 (or blank) to disable this feature.			
	Listed below are suggestions for setting this feature based on the level of security desired.			
	Low: Blank or zero			
	Medium: 5			
	High: 20			

Password expir- ation	<ul> <li>This setting determines the amount of time (in days) that a password can be used before the system requires the user to change it. This value must be between 1 and 2147483648. Use 0 (or blank) to disable this feature.</li> <li>Listed below are suggestions for setting this feature based on the level of security desired.</li> <li>Low: Blank or zero</li> <li>Medium: 90</li> <li>High: 45</li> </ul>
First time login change password	This setting determines whether users must reset their password when they first log on after a password configuration setting change or as a new user. Listed below are suggestions for setting this feature based on the level of security desired. Low: Unchecked (No) Medium: Checked (Yes) High: Checked (Yes)
Require email address	This setting determines if users are required to enter an email address when resetting their password. Listed below are suggestions for setting this feature based on the level of security desired. Low: Unchecked (No) Medium: Unchecked (No) High: Checked (Yes)

## Password Complexity Options:

Uppercase character	This setting determines if users are required to use at least one uppercase char- acter in their password. Using at least one uppercase character in conjunction with other characters increases the level of security.
	Listed below are suggestions for this feature based on the level of security desired.
	Low: Unchecked (No)
	Medium: Unchecked (No)
	High: Checked (Yes)
Lowercase character	This setting determines if users are required to use at least one lowercase char- acter in their password. Using at least one lowercase character in conjunction with other characters increases the level of security.
	Listed below are suggestions for this setting based on the level of security desired.
	Low: Unchecked (No)
	Medium: Unchecked (No)
	High: Checked (Yes)
Number	This setting determines if users are required to use at least one numeric symbol in their password. Using numeric symbols such as 1, 2, 3 increases the level of security.
	Listed below are suggestions for this setting based on the level of security desired.
	Low: Unchecked (No)
	Medium: Unchecked (No)
	High: Checked (Yes)

Special char- acter	This setting determines if users are required to use at least one special character as part of their password. Using special characters such as &, *, !, %, \$ as part of the password increases the level of security. Listed below are suggestions for this setting based on the level of security
	desired.
	Low: Unchecked (No)
	Medium: Unchecked (No)
	High: Checked (Yes)
Password may contain user- name	Y This setting determines if the user name may be used as part of the password. Passwords that contain all or part of the user name create a possible security risk. Listed below are suggestions for this setting based on the level of security
	desired.
	Low: Checked (Yes)
	Medium: Checked (Yes)
	High: Unchecked (No)

## Lockout Options:

Number of	This setting determines if users will be locked out of the application based on the
failed login	number of failed login attempts. The value must be between 1 and
attempts	2,147,483,648. Use 0 (or blank) to disable this feature.
	Listed below are suggestions for this setting based on the level of security desired.
	Low: Blank or zero
	Medium: 5
	High: 3

# **Roof Age Settings**

To access this dialog select **Tools > Configuration Settings** and then click **+** next to **Roof Age Settings**. Use this dialog to set the minimum roof age confidence score.

**Note:** Roof Age is a separately licensed service. This option will not be displayed on sites that do not have a license for Roof Age.

Roof age lookups are address-specific lookups that return both a roof age and a roof age confidence score. The confidence score is a calculated score (low, medium, high, or modeled) used to indicate the confidence in the roof age that is being provided. Confidence levels are determined by the presence or absence of a roof permit or the greater of year built/permit coverage start date within a jurisdiction and the level of rigor of the jurisdiction that enforces roof permits.

The roof age confidence score is displayed on the Edit Building Information dialog.

The roof age and confidence score may be updated by selecting **Options > Refresh Roof Age** on the valuation screen.

Roof age and roof age confidence score are displayed on the Standard and Detailed reports.

The minimum roof confidence score tells the system what the lowest acceptable confidence score is that should be provided for any address. For example, setting the minimum confidence score to "Low" means that roof ages with confidence scores of high, medium or low should be returned by the system and displayed to the end user, but that modeled scores should be excluded. Using this setting, if an address returned a roof age with a high score it would be displayed but for another address with a modeled roof age, no roof age would be displayed and the roof age data entry field on the Building Information Panel would remain null unless the end user provides a roof age.

If the system provides a roof age, the roof age confidence score is displayed below the roof age field on the Building Information Panel. If the end user changes the roof age, the confidence score is removed from the page since it no longer applies to the entered value.

## To set the minimum roof confidence score:

- 1. Use the drop down menu and select either Modeled, High, Medium, or Low.
- 2. Click **Save**. Click the icon to collapse the Roof Age settings. Click **Close** to close the Configuration Settings dialog and return to the dashboard.

# **Technical Support Settings**

Use the following settings to configure your technical support information. To access this dialog, select **Tools > Configuration Settings** and then click **+** to expand the **Technical Support Settings**. Click **Save** after making any desired changes.

Every RCT Express site can be customized with support contact information and instructions specific to the carrier.

**Note:** Valid user permission is required to edit any information on this page.

Information that can be edited includes:

- Email
- URL (website)
- Phone
- English instructions
- French instructions
- Version (The version number is display only and cannot be edited)

Email addresses and URLs will be validated by the system.

After editing any information, click **Save**.

The technical support link is available in the bottom left corner from any screen in RCT Express. When the user clicks the technical support link a pop-up is displayed with the information which has been entered above.

CoreLogic: RCT Express <sup>0</sup> Tools - Help Log Out								
Create New Valuation       Condol/Co-Op       Mobile-Manufactured Home       Renters (Contents Only)         Address, City, State, Zip/Code       Create Valuation       Use Advanced Entry								
Find Existing Valuation								
Policy Number or Address or Cit		Technical Supp	ort		×			
Policy Number To cont	tact support:							-
ESTIMATE-0164905		m				msbsupport	Express	Rady
ESTIMATE-0164904 URL						msbsupport	Express	d.æøp×
ESTIMATE-0164903	Phone: (800)809 0017 For user name and password help, call xxx-xxx-xxxx					msbsupport	Express	Reepx
	Version: 4.4.0.0					msbsupport	Express	L∢∞d)×
ESTIMATE-0164901		Close				msbsupport	Express	rad t
ESTIMATE-0164900						msbsupport	Express	dæd>
ESTIMATE-0164899						msbsupport	Express	r se
	12853 S Robinson Ranch Dr	Parker	со	80134	11/23/2015	msbsupport	Express	L <b>⊴</b> ⊠¢X
ESTIMATE Click to display technical support info	7 High Way	Chappaqua	NY	10514	11/23/2015	msbsupport	Express	r sa
	12853 S Robinson Ranch Dr	Parker		80134	11/23/2015	msbsupport	Express	rady X
Са н « 1 10 v ле 1 of 1 » н Displaying items 1 - 10 of 10								
Call (800)809 0017 for technical support. @2015 ConeLogic, Inc. All rights reserved.								

If you defined Additional English Instructions or Additional French Instructions, they will appear when you click the technical support link. The Additional English or Additional French instructions will not display if these fields are left blank.

↓ Log In User Name Password Password Di voo forent voor password?	CoreLogic RCT Express®		
User Name         Password         Image: Construction of the second seco			😧 Help
User Name         Password         Image: Construction of the second seco			
User Name         Password         Image: Construction of the second seco			
User Name         Password         Image: Construction of the second seco			
User Name Password Log In Français Did vou foceet vour password? A custom message can be defined in the Tools > Configuration Settings > Technical Support Settings			
User Name Password Log In Français Did vou foceet vour password? A custom message can be defined in the Tools > Configuration Settings > Technical Support Settings			
User Name Password Log In Français Did vou foceet vour password? A custom message can be defined in the Tools > Configuration Settings > Technical Support Settings			
Password   Log In Français  Did vou focet vour password?  A custom message can be defined in the Tools > Configuration Settings > Technical Support Settings		Log In	
Password   Log In Français  Did vou focet vour password?  A custom message can be defined in the Tools > Configuration Settings > Technical Support Settings dialog.			
Log in Français      Did you forget your password?      A custom message can be defined in the Tools > Configuration Settings > Technical Support Settings dialog.		User Name	
A custom message can be defined in the Tools > Configuration Settings > Technical Support Settings dialog.		Password	
A custom message can be defined in the Tools > Configuration Settings > Technical Support Settings dialog.			
A custom message can be defined in the Tools > Configuration Settings > Technical Support Settings dialog.		Français	
A custom message can be defined in the Tools > Configuration Settings > Technical Support Settings dialog.			
the Tools > Configuration Settings > Technical Support Settings dialog.		Did you torget your beas word?	
the Tools > Configuration Settings > Technical Support Settings dialog.			
> Technical Support Settings dialog.	A custom message can be	lefined in	
The custom message will appear when you click this link.	> Technical Support Setti	ngs dialog.	
	The custom message will ap you click this link	pear when	
Call (800)809 0017 for technical support. @2018 CoreLogic, Inc. All rights reserved.	Call (800)809 0017 for technical support.		62016 CoreLogic, Inc. All rights reserved.

# **Manage Additional Fields**

From the dashboard, select **Tools > Manage Additional Fields** to display the Manage Additional Fields dialog where you can create and edit the fields.

Additional fields are client defined fields that can be used to pass through data that will not affect the calculation of reconstruction cost. Examples of how the additional fields can be used are for identifying a particular company or line of business that a valuation is being created for or for passing cost accounting data that is used for billing back internal costs.

Once an additional field has been defined it becomes a permanent part of the RCT Express database. In order to maintain data integrity, Additional Fields can be deactivated if they are no longer desired but they cannot be deleted. The Field Code must be unique and once established cannot be changed, but the Field Names (English and French) which are the labels that are displayed in the user interface and on reports can be changed.

The set-up controls whether an individual field is displayed in the user interface and whether end users are allowed to update those fields. This allows the additional fields to be updated and managed behind the scenes through ExpressLync4 web services without any visibility to end users in the user interface.

If the purpose of an Additional Field is to collect user input, the data types allow the possibility to collect free form entries or to provide dropdown lists of pre-established values from which to select.

lanage Additiona	l Fields		
Create Additional Fie Field Code	ld Display Order	Clickto create new additional fields	Options
MASTERPOLIC	3	Master Policy No	
COMPANYNAME	2	Company Name	
CHARGEBACK	1	Chargeback Account No	Click to edit an existing field
5			Displaying items 1 - 3 of
			Close

On the Manage Additional Fields dialog you can view the fields that have already been defined. The Field Code, Display Order, and Field Name is displayed.

You can create a new field by clicking Create Additional Field.

You can edit an existing field by clicking the **Edit** button (

Additional fields are enabled under **Tools > Configuration Settings**.

# **Create Additional Fields**

## To create Additional fields:

- 1. From the dashboard select **Tools > Manage Additional Fields**.
- On the Manage Additional Fields dialog, click Create Additional Field. The Create Additional Field dialog opens.
- Enter the desired information into each field. Required fields are indicated with a red asterisk (\*).
- 4. Click Save when done. Repeat the procedure to create more Additional fields.

Create Additional Field		×
* Field Code		
* English Field Name		
French Field Name		
* Display Order	☑ Active	
* Display	Yes No	
* Editable	Yes O No	
* Data Type	String	
E	Exit without Saving	Save

## Field definitions:

## **Field Code**

Enter a name used to identify the field. The field code is not displayed to the user. This field must be unique.

## **English Field Name**

Enter a name for the field. This field name is displayed to the user.

## **French Field Name**

Optionally, enter a French field name.

#### **Display Order**

Enter a numeric value for the order in which you want the fields displayed. The system will display an alert message if the number for the display order has been previously used for another field.

## Active

Selecting the Active field makes the field eligible to be displayed to the user. The Display field can then be used to turn the display of the field on or off to the user. If Active is unchecked the field is now inactive and is not eligible to be displayed to the user regardless of the state of the Display field (Active has priority over Display). The active field is a quick way to turn the field on or off while keeping all the original settings for the field. Note that unchecking the Active field will hide the field going forward, but the field will still be displayed for previous versions of a valuation.

#### Display

If set to Yes, the user can see the field (if it is Active). If set to No, the user cannot see the field.

## Editable

If set to Yes, the user can edit the information in the field. If set to No, the field is read-only and cannot be edited.

## Data Type

Select the data type for the field. It can be one of the following types:

Currency: This format is used for dollar amounts. A \$ symbol is automatically inserted.

**Date**: If the date format is selected for the data type, a calendar icon ( iii) appears next to the field. A user can select the date from the calendar or type the date in mm/dd/yyyy format.

Decimal: This format is used for decimal value entries.

Whole Number: This format is used for whole number values (no decimal places).

**Lookup**: This format is used to define values that can be selected from a dropdown list. The user can then select one item from the dropdown list when entering values in Additional fields for a valuation.

When you select Lookup as the data type the following fields appear:

* Data Type:	Lookup	•	
Option/Lookup Value:			
* English Field Option:			
French Field Option:			Add

Enter a value in the field option (English or French) and click **Add**. Repeat for the additional values. As you enter them, they are shown in a table:

Data Type:	Lookup	
Option/Lookup Value:		
* English Field Option: French Field Option:		Add
French Fleid Option.	Dropdown or Con	mbo Box Options
English Field (	Option	French Field Option
Example1		
Example2		
Example3		

**Multi-lookup**: This format is used to define multiple values that can be selected. The user can then select multiple items when entering values in Additional fields for a valuation.

When you select Multi-Lookup as the data type the following fields appear:

* Data Type:	MultiLookup	
Option/Lookup Value: * English Field Option: French Field Option:		Add

Enter a value in the field option (English or French) and click **Add**. Repeat for the additional values. As you enter them, they are shown in a table:

* Data Type:	MultiLookup	•	
Option/Lookup Value:			
* English Field Option: French Field Option:			Add
	Dropdown or Con	nbo Box Options	
English Field (	Option	Frenc	h Field Option
Example1			
Example2			
Example3			

String: This format is used for strings of alphanumeric characters.

# **Edit Additional Fields**

## To edit Additional fields:

- 1. From the dashboard select **Tools > Manage Additional Fields**.
- 2. On the Manage Additional Fields dialog, click the edit icon (

edit. The Edit Additional Field dialog opens. The field code and the data type cannot be edited.

- Enter the desired information into each field. Required fields are indicated with a red asterisk (\*).
- 4. Click **Save** when done. Repeat the procedure to edit additional Additional fields.

Edit Additional Field		×
* Field Code	DeliveryStatus	
* English Field Name	Delivery Status	
French Field Name	État de la livraison	
* Display Order	32 V Active	
* Display	Ves No	
* Editable	Yes O No	
* Data Type	Integer	
Exi	it without Saving Save	

## Field definitions:

## **Field Code**

Enter a name used to identify the field. The field code is not displayed to the user. This field must be unique.

## **English Field Name**

Enter a name for the field. This field name is displayed to the user.

## **French Field Name**

Optionally, enter a French field name.

#### **Display Order**

Enter a numeric value for the order in which you want the fields displayed. The system will display an alert message if the number for the display order has been previously used for another field.

## Active

Selecting the Active field makes the field eligible to be displayed to the user. The Display field can then be used to turn the display of the field on or off to the user. If Active is unchecked the field is now inactive and is not eligible to be displayed to the user regardless of the state of the Display field (Active has priority over Display). The active field is a quick way to turn the field on or off while keeping all the original settings for the field. Note that unchecking the Active field will hide the field going forward, but the field will still be displayed for previous versions of a valuation.

#### Display

If set to Yes, the user can see the field (if it is Active). If set to No, the user cannot see the field.

## Editable

If set to Yes, the user can edit the information in the field. If set to No, the field is read-only and cannot be edited.

## Data Type

Select the data type for the field. It can be one of the following types:

Currency: This format is used for dollar amounts. A \$ symbol is automatically inserted.

**Date**: If the date format is selected for the data type, a calendar icon ( iii) appears next to the field. A user can select the date from the calendar or type the date in mm/dd/yyyy format.

Decimal: This format is used for decimal value entries.

Whole Number: This format is used for whole number values (no decimal places).

**Lookup**: This format is used to define values that can be selected from a dropdown list. The user can then select one item from the dropdown list when entering values in Additional fields for a valuation.

When you select Lookup as the data type the following fields appear:

* Data Type:	Lookup	•	
Option/Lookup Value:			
* English Field Option:			
French Field Option:			Add

Enter a value in the field option (English or French) and click **Add**. Repeat for the additional values. As you enter them, they are shown in a table:

Data Type:	Lookup	
Option/Lookup Value:		
* English Field Option: French Field Option:		Add
French Fleid Option.	Dropdown or Con	mbo Box Options
English Field (	Option	French Field Option
Example1		
Example2		
Example3		

**Multi-lookup**: This format is used to define multiple values that can be selected. The user can then select multiple items when entering values in Additional fields for a valuation.

When you select Multi-Lookup as the data type the following fields appear:

* Data Type:	MultiLookup	
Option/Lookup Value: * English Field Option: French Field Option:		Add

Enter a value in the field option (English or French) and click **Add**. Repeat for the additional values. As you enter them, they are shown in a table:

* Data Type:	MultiLookup	•	
Option/Lookup Value:			
* English Field Option: French Field Option:			Add
	Dropdown or Con	nbo Box Options	
English Field (	Option	Frenc	h Field Option
Example1			
Example2			
Example3			

String: This format is used for strings of alphanumeric characters.

# **Manage Business Partners**

Before an inspection company can use FIT to deliver inspection results to a carrier's RCT Express site, the carrier must add the inspection company to its list of active business partners.

When a carrier adds an inspection company as a business partner, the system sends an email notification to the inspection company that contains the URL of the RCT Express site and the inspection company's user name and password.

Use the **Manage Business Partners** page to add new business partners (inspection companies) or edit existing business partners.

**Note:** FIT is a separately licensed service. This option will not be displayed on sites that do not have a license for FIT.

To add a business partner (inspection company):

- 1. Select Tools > Manage Business Partners.
- 2. Click Add Business Partner. The Add Business Partner dialog opens.
- 3. Select the inspection company from the **Select Business Partner** list. **Note**: If a current business partner's status is listed as Active, but the authorization is set to No, they will be unable to submit inspection data using FIT.
- 4. Select the desired setting for the delivery option from the **Exterior** list. Also set the minimum number of attachments.
- 5. Select the desired setting for the delivery option from the **In & Out** list. Also set the minimum number of attachments.
- 6. Enter the user name and password. Enter the password a second time in the Confirm Password field for verification.
- 7. Click Save.

You can change an inspection company's information and status in the following ways:

- Change the delivery options. See "Delivery Options" on page 118.
- Set the required number of attachments
- Change the inspection company's status to inactive
- Change the inspection company's password

## To edit an existing business partner:

- 1. Select Tools > Manage Business Partners.
- 2. Click the **Edit** icon if for the business partner you wish to edit. The Edit Business Partner

dialog opens. You can filter each column to help locate a business partner.

3. Make the desired changes and click **Save**.

# **Manage Underwriting Questions**

This section covers the list of pre-defined FIT Underwriting Questions and answers, the ability of the carrier to allow answers outside of the provided answer list for some questions, and the ability to create new FIT Underwriting Questions.

Please note that the required questions selected by the carrier are required for all of the carrier's business partners. It is also the carrier's option to allow answers outside of the provided answer list for those questions for which the answer override flag is available.

Required questions and the ability to override the answer text vary from carrier to carrier. Inspection companies can determine precisely which of the underwriting questions are required by individual carriers and whether or not the carrier allows answers outside of the provided answer list by using the GetInspectionQuestionConfiguration web method from the FIT Configuration Service.

#### To modify the underwriting question requirements:

- 1. From the **Tools** menu, select **Manage Underwriting Questions**. The Underwriting Questions window appears.
- 2. If you want a question to be required, select the **Question Required** check box. Inspectors are required to supply answers to the questions that you select.
- 3. To allow inspectors to enter free-form answers, select the box in the column **Answers Out**side Default Answer Set Allowed. If you do not select this check box, inspectors must choose from a list of predefined answers. You can view the currently defined answers by selecting the expand icon 🖃 next to the question number.
- 4. Click Save.

## To add a question:

- 1. Click Add Question. The Add Underwriter Question dialog opens.
- 2. Enter the desired question text.
- 3. Enter the desired answer text. If you want additional answers, click Add Answer.
- 4. If you want this to be a required question select the **Question Required** check box.
- If you want answers that are different than the default answers allowed select the Answers outside default answer set allowed check box.

- 6. Click Save on the Add Underwriter Question dialog.
- 7. Click **Save** on the main Underwriting Questions screen.

#### To edit a user-defined question:

1. Click the **Edit** icon for the question you wish to edit. The Edit Underwriter Question dia-

log opens. (The Edit icon only appears for user defined questions).

- 2. Edit the question text.
- 3. Edit the answer text. If you want additional answers, click Add Answer.
- 4. If you want this to be a required question, select the Question Required check box.
- 5. If you want answers that are different than the default answers allowed, select the **Answers outside default answer set allowed** check box.
- 6. Click Save on the Edit Underwriter Question dialog.
- 7. Click **Save** on the main Underwriting Questions window.

# **FIT Underwriting Questions**

This document lists the available FIT Underwriting Questions, the associated Question Code, the available answers for each question, and notes the ability of the carrier to allow answers outside of the provided answer text list for some questions.

Please note that required questions are selected by each carrier. It is also the carrier's option to allow answers outside of the provided answer list for those questions for which the answer override flag is available.

Required questions and the ability to override the answer text vary from carrier to carrier. Inspection companies can determine precisely which of the underwriting questions are required by individual carriers and whether or not the carrier allows answers outside of the provided answer list by using the GetInspectionQuestionConfiguration web method from the ConfigurationService.

			Answer Over-
QuestionCode	QuestionText	AnswerText	ride Flag?
	Was the property located for inspec-		
Q0020	tion?	Yes	
	Was the property located for inspec-		
Q0020	tion?	No	
		Uncooperative	Yes
Q0021	If no, why?	Owner	
Q0021	If no, why?	Hostile Pet	
Q0021	If no, why?	Access Obstruction	
Q0021	If no, why?	Snow Cover	
Q0021	If no, why?	Other	
Q0021	If no, why?	Able To Inspect	
Q0022	How was the home occupied	Owner	Yes
Q0022	How was the home occupied	Tenant	
Q0022	How was the home occupied	Unoccupied	
Q0022	How was the home occupied	Vacant	

Q0022	How was the home occupied	Seasonal	
Q0022	How was the home occupied	Unable to Confirm	
Q0023	Is there a business on premises?	Yes	
Q0023	Is there a business on premises?	No	
Q0024	Is there farming on premises?	Yes	
Q0024	Is there farming on premises?	No	
Q0025	Is there a dog?	Yes	
Q0025	Is there a dog?	No	
Q0026	What breed is the dog?	Akita	Yes
Q0026	What breed is the dog?	American Bulldog	
Q0026	What breed is the dog?	Chow	
Q0026	What breed is the dog?	Dalmatian	
Q0026	What breed is the dog?	Dingo	
Q0026	What breed is the dog?	Doberman	
Q0026	What breed is the dog?	Eskimo Spitz	
Q0026	What breed is the dog?	Giant Schnauzer	
Q0026	What breed is the dog?	Great Dane	
Q0026	What breed is the dog?	Husky	
Q0026	What breed is the dog?	Malamute	
Q0026	What breed is the dog?	Mastiff	
Q0026	What breed is the dog?	Mixed Breed	
Q0026	What breed is the dog?	Pit Bull	
Q0026	What breed is the dog?	Presa Canario	
Q0026	What breed is the dog?	Rottweiler	
Q0026	What breed is the dog?	Saint Bernard	
Q0026	What breed is the dog?	Shepherd	
Q0026	What breed is the dog?	Staffordshire Terrier	
Q0026	What breed is the dog?	Wolf Hybrid	

Q0026	What breed is the dog?	Other	
Q0026	What breed is the dog?	Unable to Confirm	
Q0026	What breed is the dog?	No Dog	
Q0027	Has the dog ever bitten anyone?	Yes	
Q0027	Has the dog ever bitten anyone?	No	
Q0027	Has the dog ever bitten anyone?	Unable to Confirm	
Q0027	Has the dog ever bitten anyone?	No Dog	
Q0028	Does the dog appear aggressive?	Yes	
Q0028	Does the dog appear aggressive?	No	
Q0028	Does the dog appear aggressive?	Unable to Confirm	
Q0028	Does the dog appear aggressive?	No Dog	
Q0029	Is there livestock on the property?	Yes	
Q0029	Is there livestock on the property?	No	
Q0030	Describe the livestock?	Cattle/Cows	Yes
Q0030	Describe the livestock?	Chickens	
Q0030	Describe the livestock?	Goats	
Q0030	Describe the livestock?	Horses	
Q0030	Describe the livestock?	Llamas	
Q0030	Describe the livestock?	Ostrich	
Q0030	Describe the livestock?	Pigs	
Q0030	Describe the livestock?	Sheep	
Q0030	Describe the livestock?	Turkeys	
Q0030	Describe the livestock?	Wild/Exotic	
Q0030	Describe the livestock?	Other	
Q0030	Describe the livestock?	No Livestock	
Q0031	Is there a swimming pool?	Yes	
Q0031	Is there a swimming pool?	No	
Q0032	Pool Count	0	

Q0032	Pool Count	1	
Q0032	Pool Count	2	
Q0032	Pool Count	3	
Q0032	Pool Count	4	
Q0032	Pool Count	5	
Q0032	Pool Count	6	
Q0032	Pool Count	7	
Q0032	Pool Count	8	
Q0032	Pool Count	9	
Q0032	Pool Count	10	
Q0032	Pool Count	11	
Q0032	Pool Count	12	
Q0032	Pool Count	13	
Q0032	Pool Count	14	
Q0032	Pool Count	15	
Q0032	Pool Count	16	
Q0032	Pool Count	17	
Q0032	Pool Count	18	
Q0032	Pool Count	19	
Q0032	Pool Count	20	
Q0033	What type of pool?	Above Ground	Yes
Q0033	What type of pool?	In Ground	
Q0033	What type of pool?	No Pool	
Q0034	Describe any pool hazards	Empty	Yes
		No Locking Gate	
Q0034	Describe any pool hazards	/Steps	
Q0034	Describe any pool hazards	Not Fenced	
Q0034	Describe any pool hazards	Other	

Q0034	Describe any pool hazards	Diving Board	
Q0034	Describe any pool hazards	Slide	
Q0034	Describe any pool hazards	No Pool	
Q0035	Is there a trampoline?	Yes	
Q0035	Is there a trampoline?	No	
Q0036	Is the trampoline fenced in?	Yes	
Q0036	Is the trampoline fenced in?	No	
Q0036	Is the trampoline fenced in?	No Trampoline	
Q0040	Is there a satellite dish?	Yes	
Q0040	Is there a satellite dish?	No	
Q0041	Satellite Dish Description	Improper Installation	Yes
Q0041	Satellite Dish Description	Other	
Q0041	Satellite Dish Description	No satellite dish	
Q0042	What is the dwelling condition?	Good	
Q0042	What is the dwelling condition?	Avg	
Q0042	What is the dwelling condition?	Fair	
Q0042	What is the dwelling condition?	Poor	
Q0043	Steps (front) damage?	Major	
Q0043	Steps (front) damage?	Minor	
Q0043	Steps (front) damage?	None	
Q0043	Steps (front) damage?	Ok	
Q0044	Type of steps damage (front)	Crumbling	Yes
Q0044	Type of steps damage (front)	Dry Rot	
Q0044	Type of steps damage (front)	Falling	
Q0044	Type of steps damage (front)	Leaning	
Q0044	Type of steps damage (front)	Missing	
Q0044	Type of steps damage (front)	No Railing	
Q0044	Type of steps damage (front)	Other	

Q0044	Type of steps damage (front)	No Damage	
Q0045	Porch (front) damage?	Major	
Q0045	Porch (front) damage?	Minor	
Q0045	Porch (front) damage?	None	
Q0045	Porch (front) damage?	Ok	
Q0046	Type of damage to porch (front)	Crumbling	Yes
Q0046	Type of damage to porch (front)	Dry Rot	
Q0046	Type of damage to porch (front)	Falling	
Q0046	Type of damage to porch (front)	Leaning	
Q0046	Type of damage to porch (front)	No Railing	
Q0046	Type of damage to porch (front)	Other	
Q0046	Type of damage to porch (front)	No Damage	
Q0047	Steps (rear) damage?	Major	
Q0047	Steps (rear) damage?	Minor	
Q0047	Steps (rear) damage?	None	
Q0047	Steps (rear) damage?	Ok	
Q0048	Type of damage to steps (rear)	Crumbling	Yes
Q0048	Type of damage to steps (rear)	Dry Rot	
Q0048	Type of damage to steps (rear)	Falling	
Q0048	Type of damage to steps (rear)	Leaning	
Q0048	Type of damage to steps (rear)	Missing	
Q0048	Type of damage to steps (rear)	No Railing	
Q0048	Type of damage to steps (rear)	Other	
Q0048	Type of damage to steps (rear)	No Damage	
Q0049	Porch damage (rear)?	Major	
Q0049	Porch damage (rear)?	Minor	
Q0049	Porch damage (rear)?	None	
Q0049	Porch damage (rear)?	Ok	

Q0050	Type of porch damage (rear)	Crumbling	Yes
Q0050	Type of porch damage (rear)	Dry Rot	
Q0050	Type of porch damage (rear)	Falling	
Q0050	Type of porch damage (rear)	Leaning	
Q0050	Type of porch damage (rear)	No Railing	
Q0050	Type of porch damage (rear)	Other	
Q0050	Type of porch damage (rear)	No Damage	
Q0051	Sidewalks/Driveway damage?	Major	
Q0051	Sidewalks/Driveway damage?	Minor	
Q0051	Sidewalks/Driveway damage?	None	
Q0051	Sidewalks/Driveway damage?	Ok	
Q0052	Type of sidewalks/driveway damage.	Cracking	Yes
Q0052	Type of sidewalks/driveway damage.	Crumbling	
Q0052	Type of sidewalks/driveway damage.	Heaving	
Q0052	Type of sidewalks/driveway damage.	Missing	
Q0052	Type of sidewalks/driveway damage.	Uneven	
Q0052	Type of sidewalks/driveway damage.	Other	
Q0052	Type of sidewalks/driveway damage.	No Damage	
Q0053	Brick exterior damage?	Major	
Q0053	Brick exterior damage?	Minor	
Q0053	Brick exterior damage?	None	
Q0053	Brick exterior damage?	Ok	
Q0054	Type of brick exterior damage	Collapsing	Yes
Q0054	Type of brick exterior damage	Cracking	
Q0054	Type of brick exterior damage	Crumbling	
Q0054	Type of brick exterior damage	Separating	
Q0054	Type of brick exterior damage	Tuck Pointing	
Q0054	Type of brick exterior damage	Other	

Q0054	Type of brick exterior damage	No Damage	
Q0055	Chimney damage?	Major	
Q0055	Chimney damage?	Minor	
Q0055	Chimney damage?	None	
Q0055	Chimney damage?	Ok	
Q0055	Chimney damage?	No Chimney	
Q0056	Type of chimney damage	Collapsing	Yes
Q0056	Type of chimney damage	Cracking	
Q0056	Type of chimney damage	Crumbling	
Q0056	Type of chimney damage	Leaning	
Q0056	Type of chimney damage	Separating	
Q0056	Type of chimney damage	Tuck Pointing	
Q0056	Type of chimney damage	Other	
Q0056	Type of chimney damage	No Damage	
Q0056	Type of chimney damage	No Chimney	
Q0057	Gutters downspout damage?	Major	
Q0057	Gutters downspout damage?	Minor	
Q0057	Gutters downspout damage?	None	
Q0057	Gutters downspout damage?	Ok	
Q0057	Gutters downspout damage?	No Gutters	
Q0058	Type of gutters downspout damage	Damaged	Yes
Q0058	Type of gutters downspout damage	Detached	
Q0058	Type of gutters downspout damage	Hanging	
Q0058	Type of gutters downspout damage	Missing	
Q0058	Type of gutters downspout damage	Rusted Out	
Q0058	Type of gutters downspout damage	Sections Missing	
Q0058	Type of gutters downspout damage	Other	
Q0058	Type of gutters downspout damage	No Damage	

Q0058	Type of gutters downspout damage	No Gutters	
Q0059	Siding/frame exterior damage?	Major	
Q0059	Siding/frame exterior damage?	Minor	
Q0059	Siding/frame exterior damage?	None	
Q0059	Siding/frame exterior damage?	Ok	
Q0060	Type of siding/frame exterior damage	Damaged	Yes
Q0060	Type of siding/frame exterior damage	Dry Rot	
Q0060	Type of siding/frame exterior damage	Hanging	
Q0060	Type of siding/frame exterior damage	Missing	
Q0060	Type of siding/frame exterior damage	Paint Peeling	
Q0060	Type of siding/frame exterior damage	Patched	
Q0060	Type of siding/frame exterior damage	Other	
Q0060	Type of siding/frame exterior damage	No Damage	
Q0061	Soffits/Facia/Eaves damage?	Major	
Q0061	Soffits/Facia/Eaves damage?	Minor	
Q0061	Soffits/Facia/Eaves damage?	None	
Q0061	Soffits/Facia/Eaves damage?	Ok	
Q0062	Type of soffits/facia/eaves damage	Damaged	Yes
Q0062	Type of soffits/facia/eaves damage	Detached	
Q0062	Type of soffits/facia/eaves damage	Dry Rot	
Q0062	Type of soffits/facia/eaves damage	Hanging	
Q0062	Type of soffits/facia/eaves damage	Holes	
Q0062	Type of soffits/facia/eaves damage	Missing	
Q0062	Type of soffits/facia/eaves damage	Needs Paint	
Q0062	Type of soffits/facia/eaves damage	Other	
Q0062	Type of soffits/facia/eaves damage	No Damage	
Q0063	Door(s) damage?	Major	
Q0063	Door(s) damage?	Minor	

Q0063	Door(s) damage?	None	
Q0063	Door(s) damage?	Ok	
Q0064	Type of door(s) damage	Boarded Up	Yes
Q0064	Type of door(s) damage	Damaged	
Q0064	Type of door(s) damage	Dry Rot	
Q0064	Type of door(s) damage	Glass Broken	
Q0064	Type of door(s) damage	Missing	
Q0064	Type of door(s) damage	Needs Paint	
Q0064	Type of door(s) damage	Other	
Q0064	Type of door(s) damage	No Damage	
Q0065	Window damage?	Major	
Q0065	Window damage?	Minor	
Q0065	Window damage?	None	
Q0065	Window damage?	Ok	
Q0066	Type of window damage	Boarded Up	Yes
Q0066	Type of window damage	Damaged	
Q0066	Type of window damage	Dry Rot	
Q0066	Type of window damage	Glass Broken	
Q0066	Type of window damage	Missing	
Q0066	Type of window damage	Needs Paint	
Q0066	Type of window damage	Other	
Q0066	Type of window damage	No Damage	
Q0067	What is the foundation condition?	Good	
Q0067	What is the foundation condition?	Avg	
Q0067	What is the foundation condition?	Fair	
Q0067	What is the foundation condition?	Poor	
Q0068	Does the foundation have damage?	Yes	
Q0068	Does the foundation have damage?	No	

	What is the severity of foundation dam-		
Q0069	age?	Major	
	What is the severity of foundation dam-		
Q0069	age?	Minor	
	What is the severity of foundation dam-		
Q0069	age?	None	
	What is the severity of foundation dam-		
Q0069	age?	No Damage	
Q0070	Describe the foundation damage	Cracking	Yes
Q0070	Describe the foundation damage	Crumbling	
Q0070	Describe the foundation damage	Not Continuous	
Q0070	Describe the foundation damage	On Stilts	
Q0070	Describe the foundation damage	Open	
Q0070	Describe the foundation damage	No Damage	
Q0071	Does the home have deadbolt locks?	Yes	
Q0071	Does the home have deadbolt locks?	No	
Q0071	Does the home have deadbolt locks?	Unable to Confirm	
Q0072	Indicate where deadbolts are located	Front	Yes
Q0072	Indicate where deadbolts are located	Side	
Q0072	Indicate where deadbolts are located	Rear	
Q0072	Indicate where deadbolts are located	No Deadbolt Locks	
Q0072	Indicate where deadbolts are located	Unable to Confirm	
Q0073	Under construction?	Major	
Q0073	Under construction?	Minor	
Q0073	Under construction?	None	
Q0073	Under construction?	Ok	
Q0074	Under construction condition	Not Completed	
Q0074	Under construction condition	Renovation	

Q0074	Under construction condition	Other	
		Not Under Con-	
Q0074	Under construction condition	struction	
Q0075	Mobile home only?	In a park	Yes
Q0075	Mobile home only?	Skirting	
Q0075	Mobile home only?	Tied Down	
	Is there a fire department within 5		
Q0076	miles?	Yes	
	Is there a fire department within 5		
Q0076	miles?	No	
Q0077	What is the type of fire department?	Paid	
Q0077	What is the type of fire department?	Volunteer	
		No fire department	
Q0077	What is the type of fire department?	within 5 Miles	
Q0078	Is there a hydrant within 1000 feet?	Yes	
Q0078	Is there a hydrant within 1000 feet?	No	
Q0079	Is there an alternate water source?	Yes	
Q0079	Is there an alternate water source?	No	
Q0079	Is there an alternate water source?	Unable to determine	
Q0080	What is the alternate water source?	Swimming pool	Yes
Q0080	What is the alternate water source?	Stream	
Q0080	What is the alternate water source?	Pond	
Q0080	What is the alternate water source?	Ocean/Bay	
Q0080	What is the alternate water source?	Lake	
		No alternate water	
Q0080	What is the alternate water source?	source	
	Are there working fire extinguisher(s)		
Q0081	present?	Yes	

	Are there working fire extinguisher(s)		
Q0081	present?	No	
	Are there working fire extinguisher(s)		
Q0081	present?	Unable to Confirm	
Q0082	Are there working smoke detectors?	Yes	
Q0082	Are there working smoke detectors?	No	
Q0082	Are there working smoke detectors?	Unable to confirm	
Q0083	What is the condition of the property?	Good	
Q0083	What is the condition of the property?	Avg	
Q0083	What is the condition of the property?	Fair	
Q0083	What is the condition of the property?	Poor	
Q0084	Attractive Nuisance?	Major	
Q0084	Attractive Nuisance?	Minor	
Q0084	Attractive Nuisance?	None	
Q0084	Attractive Nuisance?	Ok	
Q0085	Attractive Nuisance Description	Pond/Lake	Yes
Q0085	Attractive Nuisance Description	Skateboard Ramp	
		Swing/Swing	
Q0085	Attractive Nuisance Description	set/Jungle gym	
Q0085	Attractive Nuisance Description	Trampoline	
Q0085	Attractive Nuisance Description	Tree House	
Q0085	Attractive Nuisance Description	Other	
		No Attractive Nuis-	
Q0085	Attractive Nuisance Description	ance	
Q0086	Yard?	Major	
Q0086	Yard?	Minor	
Q0086	Yard?	None	
Q0086	Yard?	Ok	

Q0087	Yard Condition	Appliances	Yes
Q0087	Yard Condition	Brush	
Q0087	Yard Condition	Debris	
Q0087	Yard Condition	Discarded Autos	
Q0087	Yard Condition	Ditches	
Q0087	Yard Condition	Holes	
Q0087	Yard Condition	Overgrown	
Q0087	Yard Condition	Trash	
Q0087	Yard Condition	Trip Hazards	
Q0087	Yard Condition	Other	
Q0087	Yard Condition	No Yard	
Q0088	Trees?	Major	
Q0088	Trees?	Minor	
Q0088	Trees?	None	
Q0088	Trees?	Ok	
Q0089	Trees Condition	Falling	Yes
Q0089	Trees Condition	Leaning	
Q0089	Trees Condition	Over-hanging	
Q0089	Trees Condition	Rotted	
Q0089	Trees Condition	Other	
Q0089	Trees Condition	No Trees	
Q0090	Fence?	Major	
Q0090	Fence?	Minor	
Q0090	Fence?	None	
Q0090	Fence?	Ok	
Q0091	Fence Condition	Collapsing	Yes
Q0091	Fence Condition	Leaning	
Q0091	Fence Condition	Rotted	

Q0091	Fence Condition	Other	
Q0091	Fence Condition	No Fence	
Q0092	Adjacent Exposure?	Major	
Q0092	Adjacent Exposure?	Minor	
Q0092	Adjacent Exposure?	None	
Q0092	Adjacent Exposure?	Ok	
Q0093	Adjacent Exposure Condition	Brush	
Q0093	Adjacent Exposure Condition	Commercial	
Q0093	Adjacent Exposure Condition	Debris	
Q0093	Adjacent Exposure Condition	Distance to Shore	
Q0093	Adjacent Exposure Condition	Other	
		No adjacent expos-	
Q0093	Adjacent Exposure Condition	ure	
	What is the condition of the out-		
Q0094	building?	Good	
	What is the condition of the out-		
Q0094	building?	Avg	
	What is the condition of the out-		
Q0094	building?	Fair	
	What is the condition of the out-		
Q0094	building?	Poor	
	What is the condition of the out-		
Q0094	building?	None	
	Do any of the detached structures have		
Q0095	damage?	Yes	
	Do any of the detached structures have		
Q0095	damage?	No	
	Please indicate the severity of the dam-		
Q0096	age to the detached structure.	Major	

	Please indicate the severity of the dam-		
Q0096	age to the detached structure.	Minor	
	Please indicate the severity of the dam-		
Q0096	age to the detached structure.	None	
	Please indicate the severity of the dam-		
Q0096	age to the detached structure.	Ok	
	Please indicate the severity of the dam-	No Damage to	
Q0096	age to the detached structure.	detached structures	
	Please indicate the severity of the dam-	No detached struc-	
Q0096	age to the detached structure.	ture	
	Type of damage to the detached struc-		Yes
Q0097	ture	Boarded up	
	Type of damage to the detached struc-		
Q0097	ture	Collapsing	
	Type of damage to the detached struc-		
Q0097	ture	Dry Rot	
	Type of damage to the detached struc-		
Q0097	ture	Glass Broken	
	Type of damage to the detached struc-		
Q0097	ture	Roof	
	Type of damage to the detached struc-		
Q0097	ture	Other	
	Type of damage to the detached struc-	No Damage to	
Q0097	ture	detached structures	
	Type of damage to the detached struc-	No Detached Struc-	
Q0097	ture	ture	
	Does the detached structure have elec-		
Q0098	trical services?	Yes	
	Does the detached structure have elec-		
Q0098	trical services?	No	

	Does the detached structure have elec-	No Detached Struc-
Q0098	trical services?	ture
	Does the detached structure have a	
Q0099	heat source?	Yes
	Does the detached structure have a	
Q0099	heat source?	No
	Does the detached structure have a	No Detached Struc-
Q0099	heat source?	ture
	Is the detached structure used as living	
Q0100	quarters?	Yes
	Is the detached structure used as living	
Q0100	quarters?	No
	Is the detached structure used as living	No Detached Struc-
Q0100	quarters?	ture
Q0101	Property is 10+ acres?	Yes
Q0101	Property is 10+ acres?	No
	What is the remaining estimated roof	
Q0102	life in years?	Less than 5
	What is the remaining estimated roof	
Q0102	life in years?	10-May
	What is the remaining estimated roof	
Q0102	life in years?	Greater than 10
	What is the remaining estimated roof	
Q0102	life in years?	Unable to Determine
	What is the estimated roof age in	
Q0103	years?	0
	What is the estimated roof age in	
Q0103	years?	1
	What is the estimated roof age in	
Q0103	years?	2

	What is the estimated roof age in		
Q0103	years?	3	
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Q0103	years?	4	
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Q0103	years?	5	
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Q0103	years?	206
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Q0103	years?	207
	What is the estimated roof age in	
Q0103	years?	208
Q0104	Is there roof damage?	Yes
Q0104	Is there roof damage?	No
	What is the severity of the roof dam-	
Q0105	age?	Major
	What is the severity of the roof dam-	
Q0105	age?	Minor
	What is the severity of the roof dam-	
Q0105	age?	None

	What is the severity of the roof dam-		
Q0105	age?	Ok	
	What is the severity of the roof dam-		
Q0105	age?	No Roof Damage	
Q0106	Describe the roof damage	Clawed	Yes
Q0106	Describe the roof damage	Curled	
Q0106	Describe the roof damage	Damaged	
Q0106	Describe the roof damage	Damaged Valleys	
Q0106	Describe the roof damage	Dry Rot	
Q0106	Describe the roof damage	Lifting/Buckled	
Q0106	Describe the roof damage	Moss Build-up	
Q0106	Describe the roof damage	Patched	
Q0106	Describe the roof damage	Snow Covered	
Q0106	Describe the roof damage	Uneven/Wavy	
Q0106	Describe the roof damage	Other	
Q0106	Describe the roof damage	No Roof Damage	
Q0107	Is there a wood stove?	Yes	
Q0107	Is there a wood stove?	No	
Q0108	Wood stove description	Hazard Concern	Yes
Q0108	Wood stove description	Stove Inspected	
Q0108	Wood stove description	Stove Suspected	
Q0108	Wood stove description	Other	
Q0108	Wood stove description	No Wood Stove	
	Is there another heat source besides		
Q0109	the Wood Stove?	Yes	
	Is there another heat source besides		
Q0109	the Wood Stove?	No	
Q0110	What is the other heat source?	Central	Yes

Q0110	What is the other heat source?	Electric
Q0110	What is the other heat source?	Gas
Q0110	What is the other heat source?	Kerosene
Q0110	What is the other heat source?	None
Q0110	What is the other heat source?	Oil
Q0110	What is the other heat source?	Solar
Q0110	What is the other heat source?	Space
Q0110	What is the other heat source?	Woodstove
Q0110	What is the other heat source?	Other
Q0110	What is the other heat source?	No other heat source
# **Reassign Valuations**

Use <sup>-</sup>	Fools >	Reassign	Valuations to	reassion	valuations fr	om one i	user to another.
000				rouooigii	raidation on		

	Dashboards - Tools -	- Help Log Out	
Reassign Valuations			
* Find Current Owner:			
Agency or User ID or Last Name Search	You can reassign all valuations from		
User ID Y Name Y Agency Y	one user to another or you can select		
No records to display.	specific valuations to reassign.		
Image: How Control in the second s			
* Find New Owner.			
Agency or User ID or Last Name Search			
User ID T Name T Agency T			
No records to display.			
Image: How Comparison of the second secon			
Reassign all valuations from one user to other user (Please Note: depending on the number of valuations the	a user has accorded this moress may take a counter of hour	rs to complete)	
<ul> <li>Select valuations to reassign</li> </ul>		o to complete)	
Exit without Saving		Save	

In RCT Express, each valuation has an owner and the ability to edit or view a valuation is based on ownership and user role. On a typical RCT site the user role permissions allow an end user with an Agent User role to only access valuations that they own. An end user with an Agency Manager role can typically view and edit any valuation that belongs to an end user associated with their agency. Underwriter and Admin user roles can typically view and edit any valuation in the system regardless of ownership.

Therefore when there is turnover at an agency, there may be a need to reassign the ownership of valuations from the agent who is leaving to a different agent. The reassign valuation function allows you to reassign the ownership all or some of the valuations from one user to another.

Additionally, before an end user can be deleted from the system, RCT checks to make sure that there are no remaining valuations assigned to that end user.

Find the current owner Dashboards ~ Tools ~ Help Log Out
Passign Valuations
Find Current Owner.
Agency or User ID or Last Name Search
UserID TIN Find the new Agency
No records to display. Owmer
B H K 10 ▼ P 1 of 0 → H Displaying items 0 - 0 of 0
Find New Owner
Agency or UKer ID or Last Name Reassign all the valuations from the
User ID current user to the new pency 7
No records to display. User
G is contracting the state of
Reassign all valuations from one user to other user (Please Note: depending on the number of valuations the user has associated, this process may take a couple of hours to complete)
Select valuations to reassign
Exit without Saving Save

#### To reassign all the valuations from one user to another:

- In the Find Current Owner field enter the agency, user ID, or last name of the user whose valuations you want to reassign. A grid displays showing all the results that match your search parameters.
- 2. Select the owner of the policies that you want to reassign.
- 3. In the **Find New Owner** field enter the agency, user ID, or last name of the user that you want to be the new owner. A grid displays showing all the results that match your search parameters.
- 4. Select the user that you want to be the new owner of the valuations.
- 5. To reassign all the valuations from one user to another, select Reassign all valuations from one user to other user. Note that depending on the number of valuations the user has associated with them, this process may take a couple of hours to complete.
- 6. Click Save.

Find the current owner		Dashboards 👻	Tools - Help LogOut
Find Current Owner. Agency or User For Last Name  User D      Find the new owner      K + 10 Pape 1	Search Agency Displaying items 0 - 0 of 0		
Find New Owner: Agency or User ID or Last Name User ID No records to display. No records to display. Reassign at solutions from one user to other user (Please Methods)	A grid will appear allowing you to select specific valuations to reassign. The list may be sorted.	r has associated, this process may take a coup	ie of hours to complete)
Select valuations to reassign     Policy Number     No records to display.	1 Insured Name	Y Address	Y
Exit without Saving			Displaying items 0 - 0 of 0

#### To reassign specific valuations from one user to another:

- In the Find Current Owner field enter the agency, user ID, or last name of the user whose valuations you want to reassign. A grid displays showing all the results which match your search parameters.
- 2. Select the owner of the policies that you want to reassign.
- 3. In the **Find New Owner** field enter the agency, user ID, or last name of the user that you want to be the new owner. A grid displays showing all the results which match your search parameters.
- 4. Select the user that you want to be the new owner of the valuations.
- To reassign specific valuations from one user to another, select Select valuations to reassign. A grid displays allowing you to select specific valuations. You can filter the list to help you find specific items.
- 6. Check the valuations you want to reassign.
- 7. Click Save.

## **Group Processing**

Use the group processing tasks to perform various tasks related to batch renewal groups.

Select a topic from the side menu at the right to view the procedures.

Use the Group Processing page to perform the following tasks.

- "Create and Schedule a Batch Renewal Group" on the next page
- "Edit a Batch Renewal Group" on page 111
- "Delete a Batch Renewal Group" on page 112
- "Schedule an Existing Batch Renewal Group" on page 113
- "Assign a Policy Number to a Valuation" on page 114
- "Review and Download Batch Processing Results" on page 115

## **Create and Schedule a Batch Renewal Group**

Recalculating replacement costs on a yearly basis using current costs is an effective alternative to indexing and provides a more accurate replacement cost for each individual policy in your book.

Typically, policies that are approaching their renewal dates are selected and scheduled to be recalculated as a batch process during off-peak system usage times.

Using the batch processing utility, you can select and schedule groups of valuations to be recalculated using current costs for policy renewals.

#### To create a batch renewal group:

- 1. On the main RCT Express page, click the **Tools** link. The Tools page appears.
- 2. Click the Group Processing link. The Group Processing page appears.
- 3. Click Create Group. The Create Group page appears.
- 4. In the **Name** box, type a unique descriptive name for the batch that you want to create. Example: Renew 12/2011.
- 5. Click Create. The Search Valuations page appears.
- 6. On the Search Valuations page, select a search category from the Show list and enter search criteria.
- 7. Click Search. RCT Express displays the valuations that match your search criteria.
- 8. Select the valuations that you want to add to the group. If a valuation has already been assigned to a group or is in progress, you cannot select it.
- 9. Do one of the following:
  - To add the valuation and search for more valuations, click **Add to Group**. Repeat the steps to search for additional valuations to add to the group.
  - To add the valuation and schedule the group, click Add and Schedule. The Schedule page appears.

Notes:

- A valuation must have a policy number before you can add it to a group. For more information, see Assign a Policy Number to a Valuation.
- If you want to add the valuations to the group but not schedule the batch process, click Add to Group. To schedule the batch process, see Schedule an Existing Batch Renewal Group.

### To schedule a batch renewal group:

- 1. On the Schedule page, do one of the following:
  - To process the group the next time the renewal process is scheduled to run, select **Schedule A.S.A.P.**
  - To specify the date that you want to process the group, select **Set Desired Date** and enter the date in MM/DD/YYYY format. To select the date from a calendar, click the **Select Date** icon.
- 2. Click Schedule Group.

## **Edit a Batch Renewal Group**

If a batch renewal group has not been processed, you can change the group name, add valuations, and delete valuations.

#### To edit a batch renewal group:

- 1. On the main RCT Express page, click the **Tools** link. The Tools page appears.
- 2. Click the Group Processing link. The Group Processing page appears.
- 3. Click the **Manage Groups** link. The Manage Groups page appears.
- 4. Select a search category from the Show list and enter search criteria.
- 5. Click Search. RCT Express displays the groups that match your search criteria.
- 6. Click the Edit link for the group that you want to edit.
- 7. Do one of the following:

То	Do this
Change the name of the group	Make the changes and click <b>Update</b>
Delete a valu- ation	Select the valuation and click Remove Valuations
Add a valuation	<ol> <li>Do the following:</li> <li>1. Click the Add/Search Valuations link.</li> <li>2. On the Search Valuations page, select a search category from the <b>Show</b> list and enter search criteria.</li> </ol>

- 3. Click **Search**. RCT Express displays the valuations that match your search criteria.
- Select the valuations that you want to add to the group. If a valuation has already been assigned to a group or is in progress, you cannot select it.
- 5. Click Add to Group.

### **Delete a Batch Renewal Group**

Follow these steps to delete a batch renewal group.

#### To delete a batch renewal group:

- 1. On the main RCT Express page, click the **Tools** link. The Tools page appears.
- 2. Click the Group Processing link. The Group Processing page appears.
- 3. Click the Manage Groups link. The Manage Groups page appears.
- 4. Select a search category from the Show list and enter search criteria.
- 5. Click Search. RCT Express displays the groups that match your search criteria.
- 6. Click the **Delete** link for the group that you want to delete.
- 7. Click **OK** to confirm that you want to delete the group.

## Schedule an Existing Batch Renewal Group

If you created a batch renewal group and did not schedule it for processing, follow these steps to schedule the group for batch processing.

#### To schedule an existing batch renewal group:

- 1. On the main RCT Express page, click the **Tools** link. The Tools page appears.
- 2. Click the **Group Processing** link. The Group Processing page appears.
- 3. Click the Manage Group(s) link. The Current Groups page appears.
- 4. Find the group that you want to schedule and click the **Schedule** link.
- 5. On the Schedule page, do one of the following:
- To process the group next time batch processing is scheduled to run, select Schedule A.S.A.P.
- To specify the date that you want to process the group, select Set Desired Date and enter the date in MM/DD/YYYY format. To select the date from a calendar, click the Select Date icon.
- 8. Click Schedule Group.

## Assign a Policy Number to a Valuation

A valuation must have a policy number before you can add it to a group.

#### To assign a policy number to a valuation:

- 1. From the Dashboard, select the valuation and open it.
- 2. When the valuation opens in the Valuation screen, click **Edit** in the **Policy Information** pane. The **Edit Policy Information** dialog opens.
- 3. Click the edit icon next to the **Policy Number** field.
- 4. Enter a policy number.
- 5. Click Save.

## **Review and Download Batch Processing Results**

After a group has been processed, you can view the results and download the report as an Excel spreadsheet. Processed valuations appear in the upper section of the report. Unprocessed valuations appear in the lower portion of the report.

The report uses the following acronyms:

**ACV**: Actual cash value (replacement cost - depreciation)

TIRC: Total insurable replacement cost

#### To review and download batch processing results:

- 1. On the main RCT Express page, click the **Tools** link. The Tools page appears.
- 2. Click the Group Processing link. The Group Processing page appears.
- 3. Click the Manage Group(s) link. The Current Groups page appears.
- 4. Find the group that you want to view results for and click the **Results** link.
- 5. To download the report in Excel format, click Download Excel File.
- 6. To exit the report, click **Cancel**.

# Introduction to Field Information Transfer (FIT)

Field Information Transfer (FIT) is a Web Services tool that integrates third-party inspection reports directly into individual policy records that are archived on insurance carriers' RCT Express Web sites. FIT also reviews data to validate completeness, correctness, and adherence to insurance carriers' business rules.

FIT gives insurance carriers access to all of the records necessary for claims adjustments and underwriting reviews from a single online location. Insurance carriers can accept inspection reports from multiple field inspectors. Carriers can also change calculation settings and information requirements.

Inspectors can connect to insurance carriers' data archiving systems to perform the following tasks:

- Upload inspection results to a carrier's RCT Express Web site.
- Review calculations prior to uploading the final inspection report.
- Electronically send sketches, photos, drawings, and other attachments.

### Before You Begin:

- Work with your CoreLogic representative to configure your RCT Express site for FIT.
- Make sure that your inspection agencies are licensed to use FIT.

See "FIT Setup Overview" on the next page to get started.

# **FIT Setup Overview**

CoreLogic and participating insurance carriers follow these steps to set up inspection companies and individual inspectors on FIT.

- CoreLogic licenses inspectors or inspection companies to participate in FIT.
- Insurance carrier adds inspectors to their active list.
- Inspector uploads inspection data to carrier's RCT Express Web site.

#### Before you begin:

- Work with your CoreLogic representative to configure your express site for FIT.
- Make sure that your inspectors are licensed to use FIT.

Once you've added the inspector, you can edit the record in the following ways:

- Change the delivery options.
- Set the required number of attachments.
- Change the inspector's status to inactive.
- Change the inspector's password.

### **Related Topics:**

"Manage Underwriting Questions" on page 70

## **Delivery Options**

Insurance carriers' system administrators configure delivery options for field inspectors.

The following delivery options are available:

- Archive Inspection: Adds the inspection record to the record history with no change to the existing policy record.
- Overwrite Policy: The inspection record becomes the most current version in the policy.
- **Merge**: Creates a new valuation record using the interior data from the existing policy and the exterior data from the inspection record, superseding the original valuation record.
- None: The inspector cannot submit any inspection data.