

# Integration with Xactimate 28 & XactAnalysis

## Preface

#### TECHNOLOGY THAT MAKES HCRC \$500 DOCUMENTATION EASY

MICA Mitigation Suite is an application that lets you capture mitigation related job data on-site and wirelessly deliver it to a central repository. MICA Mitigation Suite produces moisture mapping documentation of a water damage claim based on the industry standard IICRC S-500.

Licensed Materials – Property of MICA Software, LLC.

Published July 2012

**Revised February 2015** 

For further information or to reach a representative visit http://www.micaexchange.com

## **Table of Contents**

\_

Preface	2
Table of Contents	3
Some Commonly Asked Questions	5
What version of Xactimate do I need?	5
Can I download sketch from MICA to Xactimate?	5
Can I download sketch from Xactimate to MICA?	5
Can I download line items from MICA to Xactimate?	5
Can I get FNOL from XactAnalysis to MICA?	5
What data can I upload from MICA to XactAnalysis?	5
Can I send MICA scope data to Xactimate even if the claim didn't come through XactAnalysis?	5
Section I: How to Setup Xactimate Integration with MICA	6
Summary	6
How to Import MICA Data in Xactimate	6
Step 1: Create a data request from Xactimate	6
Step 2: Accept Data in Xactimate	7
Line Items in MICA Cloud	8
How to Send Data from MICA Manually	8
Some Commonly Asked Questions	9
What version of Xactimate do I need?	9
Can I download sketch from MICA to Xactimate?	9
Can I download line items from MICA to Xactimate?	9
Can I download pictures to Xactimate?	10
What type of data is sent and how about updates?	10
How to handle import failed error?	10
How do I set up Xactimate to communicate with MICA?	10
Can I set up default values for sending request to MICA?	11
How do I send the updated line items to Xactimate?	11
Can I send a job that didn't come through XactAnalysis to Xactimate?	11
Send assignment created in MICA to Xactimate	11
Download sketch, line items etc. from MICA to assignment created in Xactimate	11
Section II: How to Setup XactAnalysis Integration with MICA	12

Summary	12
How to Activate MICA option in XactAnalysis	12
How to Activate XactAnalysis option in MICA	13
How to Send FNOL to MICA from XactAnalysis	13
How to Send Data to XactAnalysis from MICA Cloud	13

## Some Commonly Asked Questions

We hear some of these questions all the time from our customers. We tried our best to respond to those questions below so that you have an easy understand of what the capability for MICA and Xactware integration is.

#### What version of Xactimate do I need?

The user needs to be on SU16 or greater (Xactimate version greater than 28.0.5156.34663).

#### Can I download sketch from MICA to Xactimate?

Yes, you can. The sketch drawn in MICA will become a sketch in Xactimate.

#### Can I download sketch from Xactimate to MICA?

No, this feature is not available at this point. You can always download a Xactimate sketch picture into MICA, but this won't be a real sketch in MICA.

#### Can I download line items from MICA to Xactimate?

All line items are transferred from MICA to Xactimate.

#### Can I get FNOL from XactAnalysis to MICA?

Yes, you can. Please see section two.

#### What data can I upload from MICA to XactAnalysis?

You can upload pictures, documents, certain dates, notes and line items from MICA to XactAnalysis. Please view section two.

## Can I send MICA scope data to Xactimate even if the claim didn't come through XactAnalysis?

Yes, you can. You can send any claim from MICA to Xactimate to create estimate from MICA's scoped data. These claims could be self-pay claims or non-program claims. Eliminate double entries.

## Section I: How to Setup Xactimate Integration with MICA

### **Summary**

This section describes how data can be exchanged between MICA and Xactimate. Any scope data that you collect in MICA can be transferred to Xactimate. This includes sketch, line items and pictures. This works even for claims that didn't originate in XactAnalysis, so this integration works for self-pay or non-program jobs. This eliminates double entries and getting estimates done from MICA's scope data.

## How to Import MICA Data in Xactimate

There are two steps in importing data from MICA to Xactimate.

- Step 1: Create a data request from Xactimate
- Step 2: Accept data in Xactimate

Note: MICA data is sent to Xactimate only if data exists. It might also take a few minutes for the response to come back.

## Step 1: Create a data request from Xactimate

- 1. Open the claim in Xactimate.
- 2. Click on the V icon (1)

3.

a. Note: please read this section if you don't see the V icon.

Project Claim Info Sketch Estimate Items XactContents C		
	MICA	X
Insured Info Coverage/Loss Parameters Loss Recap Report Manage	Access Code	
	MICA Loss ID	
Then click on the + sign (2)	Send only updates	
	Send sketch	
Vendor Reguests	Send line items	
	Notes	

+

4. Click on the **Send** to send data request to MICA (3)

Access Code: Your MICA access code that you use to log in to MICA app.

Location Code: This is the franchise code for your specific location.

MICA Loss ID: This is the loss number from MICA.

Note: To set up default values for access and locations codes, please see this section.

Cancel

5. Then click on the **Connect** from the *Control Center* to send the request to MICA.

Note: You may not find MICA as an option for vendor request depending on the claim profile. MICA option will be available for certain carriers and for generic profiles. In that case, you can create a claim with some basic information and make a vendor request from that. You will be able to download all scope data/floor plan to that claim and then you can merge that to the original profile claim.

### Step 2: Accept Data in Xactimate

- 1. Click on the Connect (1) to download data sent from MICA
- 2. The downloaded claim will be displayed on left (2)
- 3. Select the claim and click on Accept (3)

Xactimate Control Center Projects	Price List							Help Log Out
Dashboard Preferences Document Module	Dashboard Preferences Document Modules Contact Manager Users Data Transfer							
Recent Projects								ņ
	Add New Project	Carrier		•				
Project Insured Claim Number	er Profile Status	Type # Iten	ns Grand Total (	reation Date	Last Modified Date			<u>^</u>
2015-03-13-1500 Test R0314A C0314A	Carrier [In Progress]	Estimate 0	3	/13/2015 11:00:12 AM	3/13/2015 12:05:49 PM			
2015-03-12-1818 Test 0312B C0312B	Carrier [In Progress]	Estimate 13	\$422.23 3	/12/2015 2:19:06 PM	3/12/2015 7:31:45 PM			=
H + P R 10 Page 1	of 1							
XactAnalysis								ů ×
	Ø						Show Current User 💌	1
Last Connected: 3/14/2015 12:13 AM	File Insur	ed Nam	e Profile	Claim #	Туре	From	Date	Connect
Sent Items (12)	2015-03-13-1500	C031	4A Carrie	C0314A	Vendor Update	XACTNET.HOM	3/14/2015 12:13:40 AM	
Messages	2015-03-13-1500	2 C031	4A Carrie	r C0314A	Vendor Update	XACTNET.HOM	3/14/2015 12:13:41 AM	Request Assg.
							3	Accept
							_	Info
								Reject
	4			Ш			•	Delete
	H 4 F H 😣	2 Page 1	of 1					

## Line Items in MICA Cloud

1. The line items collected in MICA mobile device is displayed here

ea Items Are	a Items		Rou	nd equipment	time by: 24 l	Hours  Apply Send to XactA		
otes	Level : Main Level Area : SunRoom							
Ca	egory Item	Activity	Description	Calculator	Quantity	Note 🥏		
ACC	нтсн	- Remove 🔻	Hitch - "A" frame style with coupler					
CAB	BS	- Remove 🔻	Backsplash - plastic laminate	1P	48.00			
WTR	DHM>>	<select> V</select>	Dehumidifier (per 24 hour period) - XLa	1	3			
WTR	DRY	<select></select>	Air mover (per 24 hour period) - No mo		6			
	a:PlayRoom egory Item	Activity	Description	Calculator	Quantity	Note 🤰		
ACC	ANCR	& Remove And Replace V	Anchor - twist in ground type	1W	96.00	test1		
CAB	CTFSP6H	<select> V</select>		1F	144.00	sample		
WTR	DHM>	<select> V</select>	7		3	test2		
WTR	DHM>>	<select> •</select>	Dehumidifier (per 24 hour period) - XLa	1	3	test3		
WTR	DRY+	<select> V</select>	Air mover axial fan (per 24 hour period)		3			

- 2. This will also automatically create line items for dehumidifier and air mover
- 3. All these line items are editable. You can just click on a cell to change item.

Category	Item	Activity	Description	Calculator	Quantity	Note 浸
ACC	нтсн	- Remove 🔻	Hitch - "A" frame style with coupler			<u></u>



4. You can click on the calculator cell and the following calculator opens up. You can use F for floor area, C for ceiling area and P for perimeter (linear feet). So, if you use 1F, it will convert that to floor area before sending it to Xactimate.

5. Quantity field could be used for providing quantity for the line item.

6. You can provide any note, by clicking on the note cell and this would become part of the F9 notes in Xactimate.

7. You can delete the line item by clicking on the trash icon.

8. Equipment line items (dehumidifier and air movers) would get quantity based on the start and stop duration in MICA.

You can round the equipment time by using the round equipment time option on the top of the screen.

10. Click Save at the bottom after making changes.

Round equipment time by: 24 Hours V Apply

## How to Send Data from MICA Manually

When you collect data in MICA, you can send some of the information to XactAnalysis with one click of a button. The screen below is from MICA Cloud.

Summary	Contacts	Mitigation	Jobs/WOs	Assets	Timesheet	Dynamic Forms	Notes	Data Entry	WorkAuthori	zation	E	XactAnalysis	Pictures
Jpload Estin	nate Est	timate Audit	Task(s) U	pload Estima	ite/Documents						-		
											2	Send all to Xa	actAnalysis
Area Ite			Area Ite	ms			Rou	nd equipment tin	ne by: 6 Hour	s 🔻 Ap	ply Send	Area Items to Xa	<u>ctAnalysis</u>
Picture	s And Docun	nents	Level : I	Level : Main Level									
Dates			Area : Ut	ility Room									
			Category	Item	Ac	tivity	Desc	ription	Calculator	Quantity		Note 褑	
			ACT	AVM	<select></select>	• • Ce	eiling panel - w/	battens & staples-	1F	147.00			t
			WTR	DRY+	<select></select>	→ ▼ Air	r mover axial fa	n (per 24 hour per	r				ĩ
			Area : Ro	oom									
			Category	Item	Ac	tivity	Desc	ription	Calculator	Quantity		Note 褑	
			WTR	DHM>	<select></select>	• ▼ De	ehumidifier (per	24 hour period) -	1				1
			WTR	DRY+	<select></select>	→ ▼ Air	r mover axial fa	n (per 24 hour per	r				1
			Area:W	orkshop									
			Category	ltem	Ac	tivity	Desc	ription	Calculator	Quantity		Note 浸	
			WTR	DRY+	<select></select>	→ <b>▼</b> Air	r mover axial fa	n (per 24 hour per	r				ť
													Sav

- 1. You will find a tab in Loss Explorer called XactAnalysis (1) for claims that have been dispatched from XactAnalysis.
- 2. You can export MICA data to XactAnalysis from four sections:
  - a. Area Items: These are the scope line items you collected in MICA.
  - b. **Pictures and Documents:** Any pictures or PDF documents created in MICA.
  - c. Notes: Notes captured in MICA.
  - d. **Dates:** Different dates captured in MICA as shown on the right side.
- 3. There are two options for exporting data to XactAnalysis:
  - a. You can individually send data for each section by

clicking on **Send Area Items to XactAnalysis** or **Send Document to XactAnalysis** (3) etc. from within the section.

b. You can send all the data with one click on Send all to XactAnalysis (2).

#### **Some Commonly Asked Questions**

#### What version of Xactimate do I need?

The user needs to be on SU16 or greater (Xactimate version greater than 28.0.5156.34663).

#### Can I download sketch from MICA to Xactimate?

Yes, you can. The sketch drawn in MICA will become a sketch in Xactimate.

#### Can I download line items from MICA to Xactimate?

All line items are transferred from MICA to Xactimate.

Date	s		
-	Select All	ŭ.	
T Ins	ured Contacted:	06/05/2012	12:00 AM
-	Start Date:	06/06/2012	09:56 PM
-	Dry-Out Confirmed:	06/12/2012	12:00 AM

#### Can I download pictures to Xactimate?

Yes. The pictures can be opened by opening the estimate and clicking on the picture icon as shown below:



#### What type of data is sent and how about updates?

Sketch, line items and pictures are sent to Xactimate. MICA will send only updates after the initial data is sent.

#### How to handle import failed error?

I get the following error while accepting MICA data into Xactimate:



To resolve the above issue, you will need to open the estimate and select a price list in the **Parameters** screen before you can accept the update in the Inbox.

#### How do I set up Xactimate to communicate with MICA?

- 1. Go to Control Center->Preferences (1)
- 2. Select 3<sup>rd</sup> Party Tools (2)
- Make sure to pick the right Profile (3) and select your user ID in the User dropdown selecting All Users won't work

**Note**: Not all profiles will have MICA option. **Carrier** and **Contractor** profiles will have MICA option. Also, certain carrier profiles will have MICA option such as CSAA.



4. Make sure to check MICA *Show in List* option (4)

## Can I set up default values for sending request to MICA?

You can set up certain values for the send request form that is generally repeated.

- Go to **3<sup>rd</sup> Party Tools** as shown above.
- Expand MICA option. The following screen appears.
- You can set default values for the options displayed on right, so that you don't have to enter those repeatedly while sending request to MICA.

MICA	Show in List	<u> </u>
Defaults:		
Access Code		
Location Code		
Send only update	25	
Send sketch		
Send line items		
Send pictures		

Note: your access code is generally micaweb and location code is your location code in MICA.

#### How do I send the updated line items to Xactimate?

You can either send another request from Xactimate to get the updated line items as described in <u>step 1</u> or go to MICA portal and send manually as described <u>above</u>.

#### Can I send a job that didn't come through XactAnalysis to Xactimate?

Yes, you can send any job from MICA to Xactimate. There are two options:

- 1. Send assignment created in MICA to Xactimate
- 2. Download sketch, line items etc. from MICA to assignment created in Xactimate

#### Send assignment created in MICA to Xactimate

1. From MICA Loss explorer (in MICA cloud), go to XactAnalysis tab and then click on *Create Claim in Xactimate as shown below* 

		1			
Summary Contacts Mitigation	Jobs/WOs	Assets	Timesheet [	ynamic Form	ns Notes Da
WorkAuthorization Edit Loss Xa	ctAnalysis	Pictures	Estimate Audit	Task(s)	Upload Estimate/[
Create Assignment in XactAnalysis	2				<u>View Tr</u>
Area Items	Area Ite	ms		Ro	und equipment time
Pictures And Documents	Level : I	Main Lev	el		
Notes					
📑 Dates	Area : Be	edroom - W			

- 2. Then go to Xactimate and select *Connect* and *Accept* as show in <u>this section</u>
- 3. This will create the claim in Xactimate
- 4. From there, follow the steps (both 1 and 2) as described in this section

#### Download sketch, line items etc. from MICA to assignment created in Xactimate

1. Follow the steps described in <u>this section</u>

## Section II: How to Setup XactAnalysis Integration with MICA

### **Summary**

This section describes how data can be exchanged between MICA and XactAnalysis. You can send FNOL from XactAnalysis to MICA so that you don't have to double enter the loss information. You can send pictures, notes, documents and certain dates from MICA to XactAnalysis. You can also send line items to XactAnalysys from MICA, but the method in section one is preferable as it goes to the estimate file. The sections below describe the process in details.

## How to Activate MICA option in XactAnalysis

You will first need to activate MICA option in XactAnalysis. Please follow the steps below:

- 1. Log in to XactanAlysis web site.
- 2. Click on Administration menu.
- 3. Then click on **Company setup** item as shown below.

Assignments	Reports	Administration	Help	LOG OUT
nstruction Claim #	Quick Searc	Notification Rules		Recently V
	QUICK SCUT	Contact Methods		Necently v
		XactNet Address Info	)	
		User Administration		
		User Information		
		Personal Address Bo	ok	
		Pricing Feedback		
		Market Your Credent	ials	
		Company Filter		
		Company Setup		
	-	License Admin		
				_
		Test Menu Option		

- 4. Select Allow user to export assignment data to MICA option.
- 5. Click on Save.



## How to Activate XactAnalysis option in MICA

- 6. You will need to provide MICA support team with your XactNet address.
- 7. MICA support team will set up the necessary bridge information.

### How to Send FNOL to MICA from XactAnalysis

1. From XactAnalysis claim details section, choose **Export to Company MICA** from the dropdown as shown below.

XACTAN	ALYSIS.SP TES	τ	
XacsAnalysis0.5	P Advanced Search	5	earch Results Asal
Claim #: + Property Owner: I	aul Davis - Chubb IP-120509-208PM Ialinda Castilion Jotify Pend		
Select an Action	( ) ( )	• 0	0
Reassign	i		Action Items (0)
Email Assignmen Export to Compar		sk	s Status

2. This will send the FNOL information to MICA.

## How to Send Data to XactAnalysis from MICA Cloud

When you collect data in MICA, you can send some of the information to XactAnalysis with one click of a button.



- 1. Go to *XactAnalysis* (1) tab in loss explorer in MICA web.
- 2. You can send all data by clicking on *Send to XactAnalysis (2)*. This will send all pictures, documents, notes, certain dates and line items to XactAnalysis.
- 3. You can selectively send data by going to specific section (3):

- a. Area Items: These are the scope line items you collected in MICA.
- b. **Pictures and Documents:** Any pictures or PDF documents created in MICA.
- c. Notes: Notes captured in MICA.
- d. **Dates:** Different dates captured in MICA as shown on the right side.
- 4. **Pictures and Documents** section will show all the generated PDF documents and pictures in MICA.

Dates			
-	Select Al	Ú.	
T Int	ured Contacted:	06/05/2012	12:00 AM
	Start Date:	06/06/2012	09:56 PM
Г	Dry-Out Confirmed:	06/12/2012	12:00 AM

5. You can export selected picture or document to XactAnalysis by selecting them individually and then clicking on **Send Documents to XactAnalysis** (4) as shown in the picture below.

Note: **Send Documents to XactAnalysis** will change to **Send Notes to XactAnalysis** in note section and so on.