ASSIGNMENT WORKFLOW INSTRUCTIONS – PARTICIPANT VIEW
Log in to Performance Gateway to get started
From the Navigation Panel, select Workflow and then Estimate Management to view the Assignment List.
Assignment List is segmented into 4 different “buckets”
- New Assignments
- Assignment Received
- Estimate Uploaded
- Estimate Approved
Click on the desired Claim Number under the New Assignment bucket to receive the assignment and view initial claim detail.
Use the Navigation Bar, highlighted in red above, to view current claim activity & notes, and initial Claim Info to retrieve customer and vehicle info.
2010 Dodge Durango

VIN: 7B472654
Color: Black
License: trg-999
State: Texas
Drivable: Yes
Primary Point of Impact: Front
Secondary Point of Impact: None
Airbag Deployed: Unknown
Prior Damage: Unknown

Owner: Anderson, Ben

Location Name: 7000 Lemmon Ave
Contact First Name: 
Contact Last Name: 
Address: 7000 Lemmon Ave
Dallas, TX 75209
Phone: 

Key Dates
Date of Loss: 10/14/13
Assignment Date: 10/14/13
Assignment Received: 10/14/13
Estimate Date:
Assignment Cancelled:
Scheduled Arrival Date:
Arrival Date:
Delivery Date:
Completion Date:
Customer Pickup Date:
Billed Date:

Repair Information
Estimator:
Repair Status:
Estimate Date:
Arrival Date:
Delivery Date:

Policy Information
Insurance Company: Demo Corp
Insurance Agent: 
Policy Holder: 
Policy Number: A12345-789
Insured: Anderson, Ben

Coverages
First Party Coverage: Collision Coverage
Deductible Amount: $500.00
Deductible Status: Actual Cash Value

Liability Coverage: Combined Single Limit Liability
Per Person:
Per Occurrence:

Rental Coverage: No Coverage
Per Day (Rental):
Per Occurrence:
Return to the Assignment List screen, your Claim is now in the Assignment Received bucket. The insurance company will have the ability to view that the assignment has been received also.

“Breadcrumbs” allow to navigate to previous screens used in PerformanceGateway.

Click on the Claim Number again once you are ready to upload the estimate into Performance Gateway.
To upload the estimate, start at the Documents tab and click on Upload – then select EMS Estimate to begin the upload process.
Estimate

Is this a potential total loss?

Select Yes or No

Java screen should start
Performance Gateway will search for the exported estimate. If it's unable to find it, click the Manual button to search for it in the appropriate file/folder.

Hint: Be sure to complete and export to EMS from your estimating system.
Estimate is now uploaded – proceed to upload photos
Select Photos from the Upload dropdown
Select files from appropriate folder and click open to start upload.
Photos are now uploaded for review
Uploading Documents

Select Document from the Upload dropdown

Click on Select File to locate appropriate file directory
Select appropriate file to upload
Documents are now uploaded
Assignment is moved to Estimate Uploaded and waiting for approval from the Insurance Company.
Once the estimate has been approved, it will move to Estimate Approved and can now start work & request payment when completed.
Set Assignment List as Default Home Page

To set your default home page, click “Account” in the upper right corner, then click “My Account”

Click “Edit” to change your settings

Change your home page to “Assignment List”
Need Additional Assistance?

Contact Performance Gateway’s Customer Care Unit –
877-933-2063
Monday - Friday
7am - 7 pm CST
questions@performancegateway.com