My Workview Reminders

Introduction	his job aid outlines how to use the My Workview to manage your eminders and how to Maintain Configurable Worklists.							
Accessing My Workview	To access the My Workvi Reminders in the My Wor	ew, select the numb k section.	per link in the	Total column for My				
	My Work My Work Worklist Name My Reminders		Total 1	Overdue 0				
My Workview	The My Workview section you to manage your claim criteria.	n opens showing My s with reminders th	Reminders . T at match the	his dashboard allow worklist definition	'S			
	My Workview			# Q 0 0				
My Work O My Peer's Work RHOTO APP. Waiting	Showing 1 claims from 02/16/2018 - 02/20/2018 🋗 Enter C	laim Reference ID Q - Select Batch Action		Overdue				
oh Images Vealing 0 X PHOTO APP - Images 0 SnapClaim 3 All Claims (test) 12 Assignment Received (test) 1 Received (test) 11 Supplements 0 Requested (test) 0 Waiting for Estimate 0	Claim Office Reminder Due Date Reminde REGION 02/17/2018 09:00 Test Rem	Subject Reminder Status Priority dder OPEN Medium	Multiple Reminders Remini	ler Create Date Overdue Days Overdue 02/16/2018 08:52 N				
(test) U My Reminders 1	4		111]				
Claim Folder Assignment Entry								
Actions Data Contacts	« Summary Documents (8) Images	(10) Notes Reminders History		Claim Folder: O	^			
Common Actions	2005 Ford EXPLORER 4X2 XLT							
Create Claim Folder Note	Documents for Review							

Note: Another worklist can be selected using the left side panel under the My Work and My Peer's Work radio button options.

Est/Supp

S01

E01

Amount Submitted By

\$276.83 APPRAISER, STAFF

\$289.78

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Actions

Status

Submitted

Auto Approved



Upload Documents Estimate With Images Vie

Email Attachments

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Date

01/20/2018

01/20/2018

Document

🛨 Supplement 01

🛨 Estimate 01



SOLUTIONS	1 My Workview						# 0	
● My Work O My Peer's Work	Showing 1 claims from 02/16/20	218 - 02/17/2018	Q	Edit Reminder(s)	- 🖬 <	> 2 2 0 0	Verdue	
PHOTO APP - Wating on Images PHOTO APP - Images Uploaded SnapClaim	Appraiser Claim ID	Owner Vehicle Demo, Test 2005 FORD	EXPLORER 4X2 XLT 0	ssgn Sent 1/20/2018 15:04	Claim Office REGION	Reminder Due Date 02/17/2018 09:00	Reminder Subject Test Reminder	Reminder St OPEN
Appointments - All Claims (lest) 11 Assignment Received 0 (lest) 0 Estimate/Supplement 10 Supplements 0 Requested (lest) 0 Wating for Estimate 0 My Reminders 1 •			Select Date Range From: 09/15/2020 To: 09/22/2020 C	iear OK	(09/15/2020) (09/22/2020) Cencel			•
Actions Data Contacts	s Summary (Documents (8) Images	(10) Notes Remin	nders History	1		Claim Folder: cs-0	12018-01 🗢 ^
Common Actions	2005 Ford EXP	LORER 4X2 XLT						
Create Claim Folder Note	Documents for	Review						
Upload Documents	Date	Document	Est/Supp	Amount	Submitted By	Status		Actions
Estimate With Images Viewer	01/20/2018	* Supplement 01	S01	\$289.78		😑 Submi	tted	
Email Attachments	01/20/2018	🚖 Estimate 01	E01	\$276.83	APPRAISER, STAFF	Auto A	pproved	

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Search Claim	Use the f	ollowing to search for a claim folder:
Folder	Step	Action
	1	Search for a claim folder by typing the claim number in the (A) Enter Claim Reference ID field and click search.
	2	Click the appropriate claim folder from the Quick Search Results.
		Quick Search Results
		Claim Reference ID
	3	The claim folder will appear in the (B) lower panel, here claim folder information can be reviewed or edited.

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	My Workview		А			*	Q 😮 🕩
● My Work ○ My Peer's Work	Showing 3 claims from 02/19/2018	- 02/20/2018	Q	Select Batch Action		C D 🜢 🖶 🖾 🗆	Overdue
PHOTO APP - Waiting 0	Appraiser Claim ID	Owner Vehicle		Assgn Sent	Claim Office	Reminder Due Date Re	eminder Subject F
PHOTO APP - Images 0 Uploaded		Demo, Test 2005 FC	RD EXPLORER 4X2 XLT	02/19/2018 14:46	REGION	02/20/2018 14:47 Te	est Reminder C
SnapClaim Appointments 2		Demo, Test 2005 FC	RD EXPLORER 4X2 XLT	02/19/2018 14:46	REGION	02/20/2018 14:48 Te	est Reminder2 C
All Claims (test) 12		Demo, Test 2005 FC	RD EXPLORER 4X2 XLT	02/19/2018 15:02	REGION	02/20/2018 15:02 Te	est Reminder C
Assignment Received 0 (test) Estimate/Supplement 12 Supplements 0 Waiting for Estimate 0 (test) Mv Reminders 3 Claim Folder Assignment Entry	ъ	m					
Actions Data Contacts	« Summary Do	cuments (8) Images (1	0) Notes Remin	ders History		Claim Folder	: cs-012018-02 🗢 ^
Common Actions	2005 Ford EXPLC	ORER 4X2 XLT					
Change Claim Folder TL Indicator	Documents for R	eview					
Create Claim Folder Note Upload Documents	Date	Document	Est/Supp	Amount Subm	nitted By	Status	Actions
Estimate With Images Viewer	01/20/2018	★ Supplement 01	S01	\$481.40		 Submitted 	
Email Attachments	01/20/2018	★ Estimate 01	E01	\$429.37 APPR	AISER, STAFF	Auto Approved	

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Edit Reminders Use the following to edit Reminder(s):

Step	Action
1	Select Edit Reminder(s) from the drop-down.
2	Select a claim folder(s) from the My Workview, press and hold Shift to select multiple reminders in sequence or press and hold Ctrl to select reminders in any order.
3	Select the execute selected batch action checkmark, the Claim Folder Reminder Batch Update window opens.

	My Workview			1	3		Q 0 🕩
● My Work ○ My Peer's Work	Showing 3 claims from 02/19/2018	- 02/20/2018	٩	Edit Reminder(s)	_ ∠ < >	C D & 🖶 🕅 🗆	Overdue
PHOTO APP - Waiting 0	Appraiser Claim ID	Owner Vehicle		Assan Sent	Claim Office	Reminder Due Date Re	minder Subject
PHOTO APP - Images 0		Demo, Test 2005 FORE	EXPLORER 4X2 XLT	02/19/2018 14:46	6 REGION	02/20/2018 14:47 Te	st Reminder
SnapClaim 2 Appointments 2	1	Demo, Test 2005 FORE	EXPLORER 4X2 XLT	02/19/2018 14:46	6 REGION	02/20/2018 14:48 Te	st Reminder2
All Claims (test) 12		Demo, Test 2005 FORE	EXPLORER 4X2 XLT	02/19/2018 15:02	2 REGION	02/20/2018 15:02 Te	st Reminder
Assignment received 0 (test) Estimate/Supplement 12 Supplements 0 Waiting for Estimate 0 (test) Mv Reminders 3 Claim Folder Assignment Entry		11		2			×
Actions Data Contacts	« Summary Doo	cuments (8) Images (10)	Notes Remind	ders History		Claim Folder:	cs-012018-02 C
Common Actions	2005 Ford EXPLO	RER 4X2 XLT					
Change Claim Folder TL Indicator	Documents for R	eview					
Upload Documents	Date	Document	Est/Supp	Amount Sub	omitted By	Status	Actions
Estimate With Images Viewer	01/20/2018	* Supplement 01	S01	\$481.40		 Submitted 	
Email Attachments	01/20/2018	🛨 Estimate 01	E01	\$429.37 APF	PRAISER, STAFF	Auto Approved	

Note: The Edit Reminder(s) batch action is available ONLY for the reminders worklist template.

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Use the checkboxes to select the reminder(s) to perform a Batch Update Edit for from the Claim Folder Reminder Batch Update window. Then select a Reminders, continued batch action. After completion, a message will appear indicating the Batch action was successful.

Claim Folder Reminder Batch Update					X
Reminder History				_	
ClaimReference ID	Due Date/ Time	Priority	Status	Assigned To	Subject
	02/20/2018 02:47 pr	m Low	OPEN		Test Reminder
	02/20/2018 03:02 pr	m Low	OPEN		Test Reminder
Showing 1 to 2 of 2 entries					
Reassion Change Date	Mark as Done Remove Reminder				
Theory Change Out					
Part			Function		
Reassign	Select Reassigr field, then click	n then enter a Save.	Reinspecto	r's name in the	Re-Assign To
	Re-Assign To*			Cancel Save	
	Note: The Remi	inder status, l	Reminder Du	ie Date is retair	ned.
Change Date	Select Change I then click Save	Date then ent	er a Date an Days From Today*	d Time or a Day	rs From Today,
Mark as Done	Select Mark as I	Done then se	lect Yes to c	onfirm.	
	Mark Reminder as done Are you sure you want to mar	rk this Reminder(s) as done	? Yes	No	
Remove Reminder	Select Remove Remove Reminder(s) Are you sure you want to d	Reminder the	en select Ye	s to confirm.	
			Yes	No	

Note: Select No or Cancel to exit the batch action.

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Close Claim Folder

Use the following to Close a Claim Folder:

Step Action 1 Select Close Claim Folder from the drop-down. 2 Select a claim folder(s) from the My Workview, press and hold Shift to select multiple reminders in sequence or press and hold **Ctrl** to select reminders in any order. 3 Select the execute selected batch action checkmark, the Change Claim Folder Status window opens.

			My Work	view						🖷 Q 🔞	•
● My Work ○ My Peer's	s Work		Showing 3 claims fro	om 02/19/2018 - 02	/20/2018 🛗	٩	Close Claim Folder	_ Z < >	S 9 🜢 🖯	Overdue	
PHOTO APP - Waiting on Images	0		Appraiser	Claim ID	Owner	Vehicle	Assgn Sent	Claim Office	Reminder Due Date	Reminder Subject	F
PHOTO APP - Images Uploaded	0				Demo, Test	2005 FORD EXPLORER 4X2 XLT	02/19/2018 14:46	REGION	02/20/2018 14:47	Test Reminder	¢
SnapClaim Appointments	2	П			Demo, Test	2005 FORD EXPLORER 4X2 XLT	02/19/2018 14:46	REGION	02/20/2018 14:48	Test Reminder2	c
All Claims (test)	12	1			Demo, Test	2005 FORD EXPLORER 4X2 XLT	02/19/2018 15:02	REGION	02/20/2018 15:02	Test Reminder	c
Assignment Received (test)	0 ≡	-									
Estimate/Supplement Received (test)	12										
Supplements Requested (test)	0										
Waiting for Estimate (test)	0		4			m					•
Mv Reminders	3 -										

From the Change Claim Folder Status window:

From the	Change Claim Folder Status window:	Chan	ge Claim Folder Status	X
Step	Action	4	Reason* :	-
4	Use the drop-down to select a Reason .			\sim
	 Payment Sent Total Loss File Cancelled Other 	5	Message :	~
5	Enter a Message (optional).		Submit Cancel	
	Note: The Reason selected will appear as text in the message field.		6	
6	Click Submit when complete. A message will appear indicating the Claim Folder Status was successfully changed to Closed.			



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