

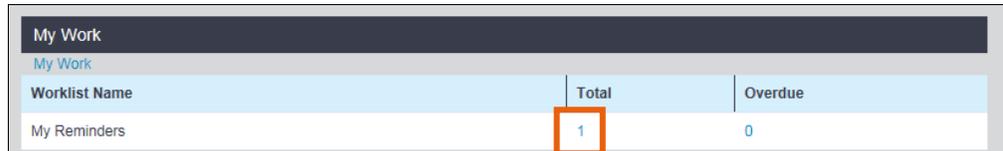
My Workview Reminders

Introduction

This job aid outlines how to use the My Workview to manage your reminders and how to Maintain Configurable Worklists.

Accessing My Workview

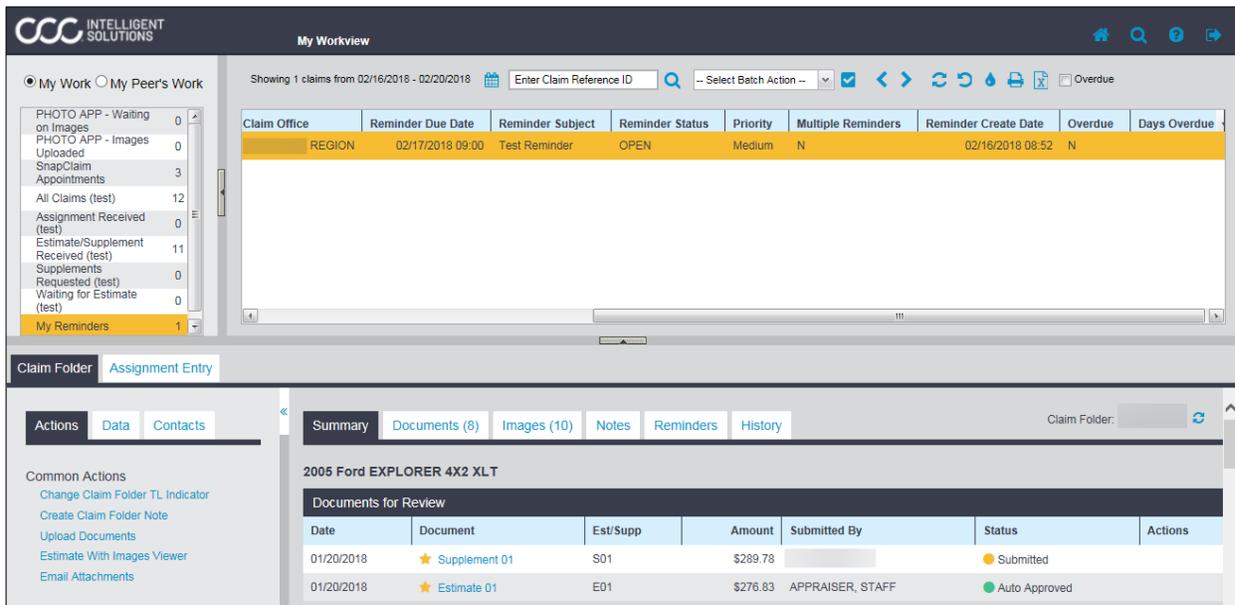
To access the **My Workview**, select the number link in the Total column for **My Reminders** in the **My Work** section.



Worklist Name	Total	Overdue
My Reminders	1	0

My Workview

The **My Workview** section opens showing **My Reminders**. This dashboard allows you to manage your claims with reminders that match the worklist definition criteria.



Claim Office	Reminder Due Date	Reminder Subject	Reminder Status	Priority	Multiple Reminders	Reminder Create Date	Overdue	Days Overdue
REGION	02/17/2018 09:00	Test Reminder	OPEN	Medium	N	02/16/2018 08:52	N	

Date	Document	Est/Supp	Amount	Submitted By	Status	Actions
01/20/2018	★ Supplement 01	S01	\$289.78		Submitted	
01/20/2018	★ Estimate 01	E01	\$276.83	APPRAISER, STAFF	Auto Approved	

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

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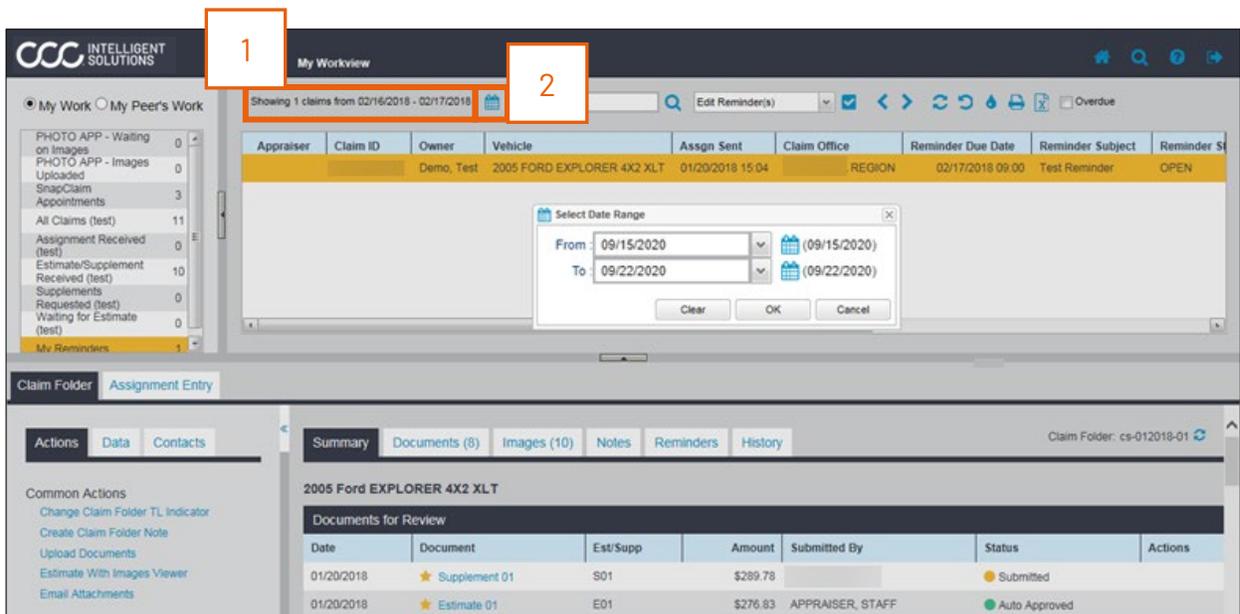


My Workview Reminders, Continued

Calendar Options

Use the following to edit the Reminders Date Range search results:

Part	Function
1	The number of claims showing and the actual selected date range.
2	<p>Select the calendar icon, then select a date range of 30 days or less.</p> <p>Select a date or use the drop-down to select a date option and enter a value for N if available (ex: <i>Yesterday to N weeks from now</i>). When complete click OK.</p> <div data-bbox="565 562 1209 787" data-label="Image"> </div> <p>Select Date Range options:</p> <ul style="list-style-type: none"> • Clear: Select to clear all fields. • OK: Accept Date Range changes. • Cancel: Close Date Range without making any changes. <p>Note: Claims can be viewed a maximum of 6 months from the current date and can only be viewed in a 30-day range, otherwise an error message will appear.</p>



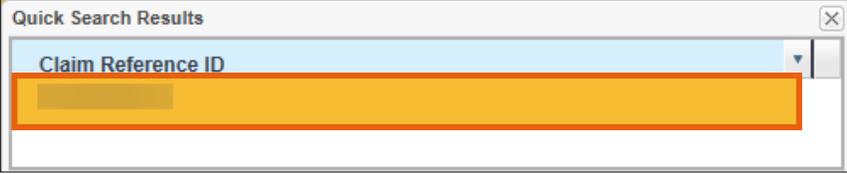
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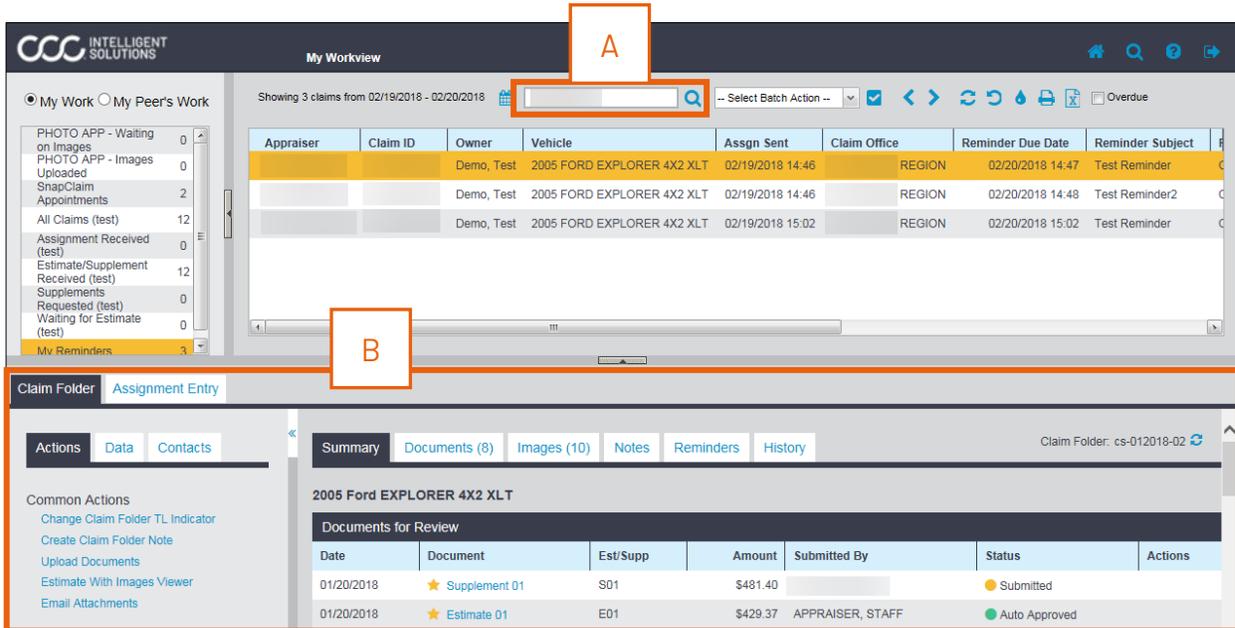


My Workview Reminders, Continued

Search Claim Folder

Use the following to search for a claim 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. 
3	The claim folder will appear in the (B) lower panel, here claim folder information can be reviewed or edited.



The screenshot shows the 'My Workview' interface. At the top, a search bar is highlighted with a red box and labeled 'A'. Below the search bar, a table displays a list of claims with columns for Appraiser, Claim ID, Owner, Vehicle, Assgn Sent, Claim Office, Reminder Due Date, and Reminder Subject. Below this table, a lower panel is highlighted with a red box and labeled 'B'. This panel shows the 'Claim Folder' details for '2005 Ford EXPLORER 4X2 XLT'. It includes a 'Documents for Review' table with columns for Date, Document, Est/Supp, Amount, Submitted By, Status, and Actions.

Appraiser	Claim ID	Owner	Vehicle	Assgn Sent	Claim Office	Reminder Due Date	Reminder Subject
		Demo, Test	2005 FORD EXPLORER 4X2 XLT	02/19/2018 14:46	REGION	02/20/2018 14:47	Test Reminder
		Demo, Test	2005 FORD EXPLORER 4X2 XLT	02/19/2018 14:46	REGION	02/20/2018 14:48	Test Reminder2
		Demo, Test	2005 FORD EXPLORER 4X2 XLT	02/19/2018 15:02	REGION	02/20/2018 15:02	Test Reminder

Date	Document	Est/Supp	Amount	Submitted By	Status	Actions
01/20/2018	★ Supplement 01	S01	\$481.40		Submitted	
01/20/2018	★ Estimate 01	E01	\$429.37	APPRAISER, STAFF	Auto Approved	

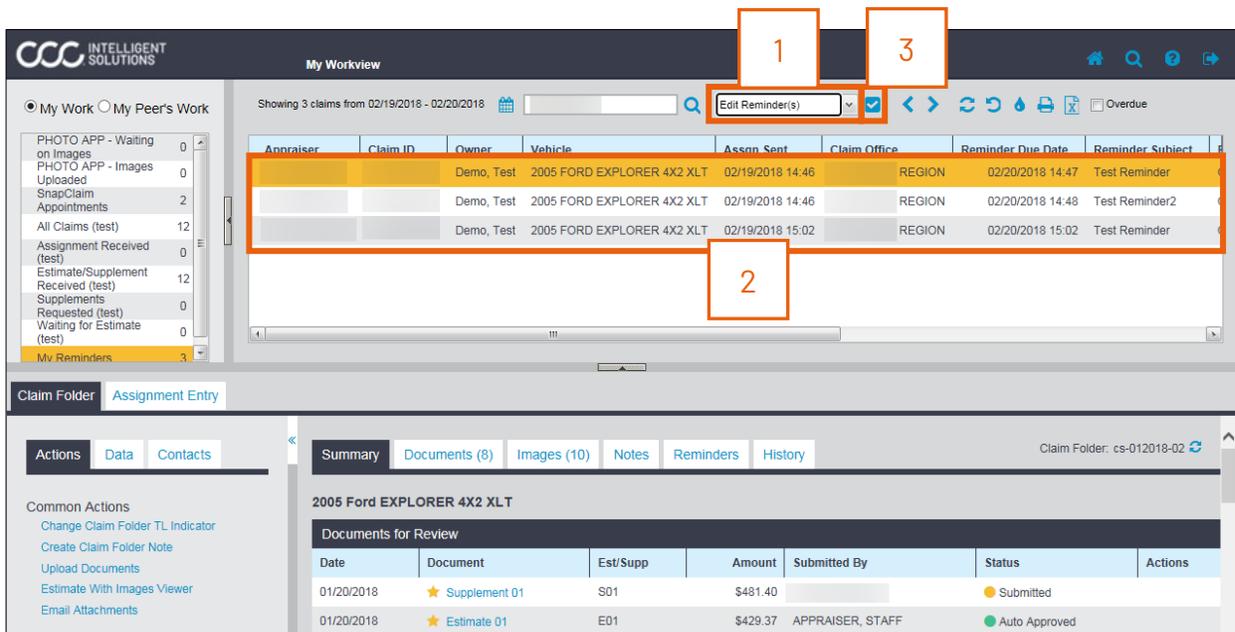
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My Workview Reminders, Continued

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.



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

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My Workview Reminders, Continued

Edit Reminders, continued

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

<input type="checkbox"/>	ClaimReference ID	Due Date/ Time	Priority	Status	Assigned To	Subject
<input checked="" type="checkbox"/>		02/20/2018 02:47 pm	Low	OPEN		Test Reminder
<input checked="" type="checkbox"/>		02/20/2018 03:02 pm	Low	OPEN		Test Reminder

Showing 1 to 2 of 2 entries

Buttons: Reassign, Change Date, Mark as Done, Remove Reminder

Part	Function
Reassign	<p>Select Reassign then enter a Reinspector's name in the Re-Assign To field, then click Save.</p> <p>Note: The Reminder status, Reminder Due Date is retained.</p>
Change Date	<p>Select Change Date then enter a Date and Time or a Days From Today, then click Save.</p>
Mark as Done	<p>Select Mark as Done then select Yes to confirm.</p>
Remove Reminder	<p>Select Remove Reminder then select Yes to confirm.</p>

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

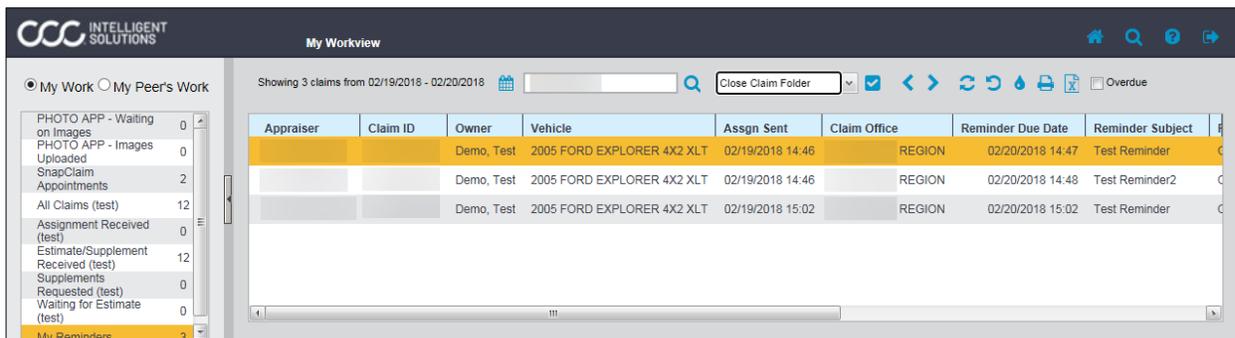
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My Workview Reminders, Continued

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.



From the Change Claim Folder Status window:

Step	Action
4	Use the drop-down to select a Reason . <ul style="list-style-type: none"> • Payment Sent • Total Loss • File Cancelled • Other
5	Enter a Message (optional). Note: The Reason selected will appear as text in the message field.
6	Click Submit when complete. A message will appear indicating the Claim Folder Status was successfully changed to Closed.

