

# Claim Folder Reminders Tab

**Introduction** Claim folders in the CCC portal give users with the appropriate access the ability to use the Reminders tab for a claim. This job aid walks through the View, Create, Edit, Overdue, Update, and Close Claim Folder functionality of the Reminders tab.

**View Reminders** Users with access will see the **Reminders** tab in an open claim folder. Select the **Reminders** tab to view the Reminder(s) for the selected claim.

ClaimReference ID	Due Date/ Time	Priority	Status	Assigned To	Subject	Actions
TEST123543234	12/23/2019 09:19 am	Medium	OPEN	Reinspectorone, Boston	Hi 1	
TEST123543234	12/25/2019 09:19 am	Low	COMPLETED	Reinspectorone, Boston	Hi 2	
TEST123543234	12/22/2019 10:31 am	Low	OVERDUE	Reinspectorone, Boston	Hi 3	
TEST123543234	12/25/2019 10:29 am	Low	DELETED	Reinspectorone, Boston	Hi 4	

Reminders have the following columns:

Column Header	Description
Claim Reference ID	Claim Reference ID created by the system.
Due Date/ Time	Due Date and Time for the Reminder entered by the user or generated by the system.
Priority	Level of importance for the Reminder. Options are <b>Low</b> , <b>Medium</b> , or <b>High</b> .
Status	Current status of the Reminder. Options are <b>OPEN</b> , <b>OVERDUE</b> , <b>DELETED</b> , or <b>COMPLETED</b> .
Assigned To	Name of the person assigned to the Reminder.
Subject	Subject for the Reminder.
Actions	Actions to update the Reminder are <b>Edit</b> , <b>Remove</b> , and <b>Mark as Done</b> icons. <b>Note:</b> These icons only appear for OVERDUE and OPEN statuses.

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## Claim Folder Reminders Tab, Continued

### Create Reminders

Use the following steps to create a new Reminder for a claim folder:

Step	Action
1	Select the <b>Reminders</b> tab on a claim folder.
2	Select the <b>Add Reminder</b> button. The Create Reminder Indicator section displays.
3	Enter the Reminder information into the fields ( <i>shown below</i> ).
4	Click <b>Save</b> after entering the Reminder information.

Field	Description
Date*	Defaults to the next calendar date.
Days From Today*	Select the radio button and enter the number of days from the current day to receive the Reminder.
Time*	Defaults to your computer's current time.
Priority*	Select one of the following priorities from the dropdown box: Low, Medium, or High.
Assign To*	This field defaults to the logged in user, and can be updated to any active user in the Insurance Company. Type in a user's name in the field to search or select a user from the auto populated list to assign the Reminder to.
Subject*	Enter a Reminder subject ( <i>maximum of 100 characters</i> ).
Note*	Enter a Reminder notes ( <i>maximum of 1000 characters</i> ).

**Note:** Required fields are indicated with a red asterisk (\*). Only one Date field can be used for a Reminder.

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## Claim Folder Reminders Tab, Continued

### Create Reminders, continued

After saving the Reminder one of the following messages will appear:

Message	Description
Successful	If all required information was entered correctly a <b>Reminder Created Successfully</b> message will appear. The newly created Reminder's status will be set to <b>OPEN</b> .
<div style="background-color: #333; color: white; padding: 5px;">Reminder History</div> <div style="background-color: #4CAF50; color: white; padding: 5px; display: flex; align-items: center;">  Reminder Created Successfully         </div>	
Unsuccessful	If any required fields contain missing or invalid information an error message displays and indicates the fields that need attention. Correct the fields as needed and resave the Reminder.
<div style="background-color: #333; color: white; padding: 5px;">Create Reminder Indicator</div> <div style="background-color: #F44336; color: white; padding: 5px;"> <ul style="list-style-type: none"> <li>▪ Required fields are Missing</li> <li>▪ Please enter a valid number for days</li> <li>▪ Please select a valid Employee name</li> </ul> </div>	

The following Action icons are available for Reminders with an OPEN status:

Actions	Description
Edit	Edit existing Reminder in OPEN status.
Remove	Remove existing Reminder in OPEN status.
Mark as Done	Mark an existing Reminder as Done/ Completed.

### Edit Reminders

Use the following to edit a Reminder:

Step	Action
1	Select the <b>Edit</b> icon for the Reminder you need to edit. The Edit Reminder Indicator section appears.
2	Make necessary changes to the Reminder.
3	Select <b>Save</b> when finished.

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## Claim Folder Reminders Tab, Continued

### Overdue Reminders

If a Claim Reminder Due Date and/or Time is exceeded the Reminder's status will be updated to **OVERDUE** and, the Actions column's **Mark as Done** icon will change color from green to red.

The following Action icons are available for Reminders with an **OVERDUE** status:

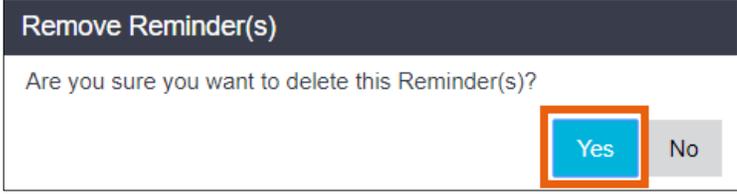
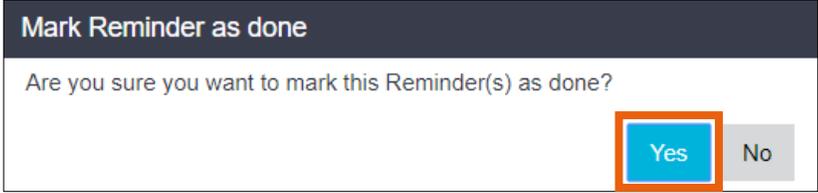
Part		Description
Edit		Edit existing Reminder in OVERDUE status.
Remove		Remove overdue Reminder in OVERDUE status.
Mark as Done		Mark an overdue Reminder as Done/ Completed.

### Update Reminders

Reminders can be updated to **Remove** or **Mark as Done** one of the following ways:

#### Action icons

Update the Reminders using the following icons in the Actions column.

Icons	Description
Remove 	Select icon to remove a Reminder, then select <b>Yes</b> to confirm deletion.  
Mark as Done 	Select icon to mark Reminder as Done/ Complete, then select <b>Yes</b> to confirm.  

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## Claim Folder Reminders Tab, Continued

### Update Reminders, continued

Reminders can be updated to **Remove** or **Mark as Done** one of the following ways (*continued*):

#### Batch Update

Reminders can also be updated using a Batch Update method to remove or mark done. Select the checkboxes next to the corresponding Reminder, then select **Mark as Done** or **Remove Reminder**.

The screenshot shows a web interface with a 'Reminders' tab selected. Below the navigation tabs is a 'Reminder History' table. The table has columns for ClaimReference ID, Due Date/ Time, Priority, Status, Assigned To, Subject, and Actions. Four rows of reminder data are visible, each with a checkbox in the first column. The checkboxes for the first, second, and fourth rows are highlighted with a red box. Below the table, there are three buttons: 'Add Reminder', 'Mark as Done', and 'Remove Reminder'. The 'Mark as Done' and 'Remove Reminder' buttons are also highlighted with a red box.

<input type="checkbox"/>	ClaimReference ID	Due Date/ Time	Priority	Status	Assigned To	Subject	Actions
<input type="checkbox"/>	TEST123543234	12/23/2017 09:19 am	Medium	OPEN	Reinspectorone, Boston	Hi 1	
<input type="checkbox"/>	TEST123543234	12/25/2017 09:19 am	Low	COMPLETED	Reinspectorone, Boston	Hi 2	
<input type="checkbox"/>	TEST123543234	12/22/2017 10:31 am	Low	OVERDUE	Reinspectorone, Boston	Hi 3	
<input type="checkbox"/>	TEST123543234	12/25/2017 10:29 am	Low	DELETED	Reinspectorone, Boston	Hi 4	

#### Individual Reminder

Reminders can be updated by selecting the Reminder's Edit icon, then selecting **Mark as Done** or **Remove Reminder**.

The screenshot shows the 'Edit Reminder Indicator' form. It has fields for Date, Time, Priority, Assign To, Subject, and Note. The Date field is set to 12/23/2017, Time to 08:01 am, Priority to Medium, Assign To to Reinspectorone, Boston, and Subject to Reminder 1222. The Note field contains 'Notes Reminder 1222'. At the bottom right, there are three buttons: 'Cancel', 'Mark As Done', and 'Remove Reminder'. The 'Mark As Done' and 'Remove Reminder' buttons are highlighted with a red box.

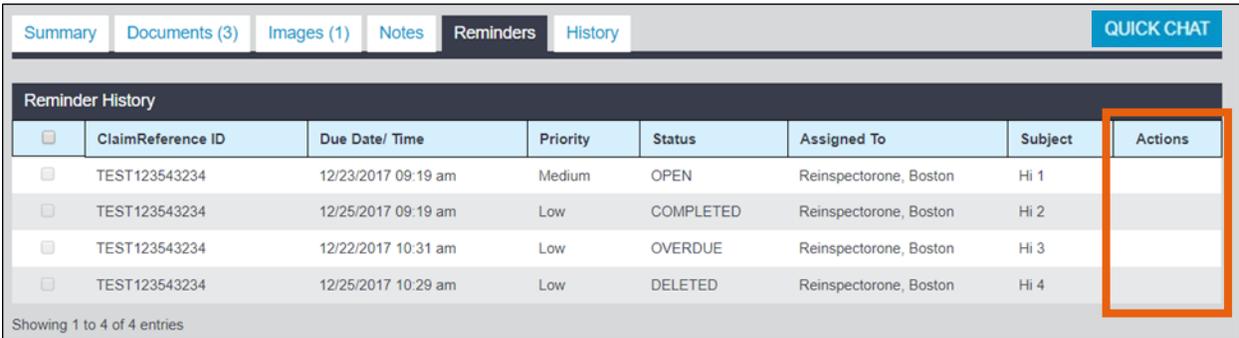
**Note:** When Remove Reminders is selected the status changes to DELETED and when Mark as Done is selected the status changes to COMPLETED.

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## Claim Folder Reminders Tab, Continued

### Closed Claim Folder

If the claim folder status is closed, the **Actions** icons are not displayed. The user cannot perform any actions on the **Reminders** tab. The Actions icons will only display if the claim folder is re-opened.



<input type="checkbox"/>	ClaimReference ID	Due Date/ Time	Priority	Status	Assigned To	Subject	Actions
<input type="checkbox"/>	TEST123543234	12/23/2017 09:19 am	Medium	OPEN	Reinspectorone, Boston	Hi 1	
<input type="checkbox"/>	TEST123543234	12/25/2017 09:19 am	Low	COMPLETED	Reinspectorone, Boston	Hi 2	
<input type="checkbox"/>	TEST123543234	12/22/2017 10:31 am	Low	OVERDUE	Reinspectorone, Boston	Hi 3	
<input type="checkbox"/>	TEST123543234	12/25/2017 10:29 am	Low	DELETED	Reinspectorone, Boston	Hi 4	

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