Shop Scheduling – Insurance Appointments

Introduction Shop Scheduling allows insurance companies that are enabled for scheduling to add estimating appointments to your calendar if your shop has been configured to accept them.

> Appointment workfiles can be identified in the Workfiles View, with Inbox notifications, within the Workfile as well as on the Calendar. This job aid will show you how to identify appointments sent from the insurance company to your repair facility known as Insurance Appointments and what you can do with an appointment.

Workfile View **Insurance Appointments** are created by the insurance company for your repair facility. These appointments will appear in the Workfiles view. They can be identified by the description in the Updates column and the Workfile preview panel. The Action drop-down menu item of a selected Insurance Appointment has the following options: Assign Estimator, Accept Opportunity, Convert to Repair Order, Merge or Delete.

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Shop Scheduling – Insurance Appointments, Continued

Inbox Insurance appointment notifications will also appear in your inbox. Here you can see your Received, Cancelled and Updated Insurance Appointments.

Part	Action
1	Click the envelope icon to access your Inbox.
2	Click Insurance Companies to show only your notifications from
	Insurance Companies.
3	Click to View or Delete the selected notification. If View is selected the
	Message dialog box will appear displaying additional appointment
	information.

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Shop Scheduling – Insurance Appointments, Continued

Insurance Appointments automatically display in your repair facility's Accessing Calendar calendar when they are assigned by the insurance company as Estimate Appointments.

Use the following to access your calendar:

Step	Action
1	Select the menu icon.
2	Then select Calendar . The Calendar view opens.

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🚀 Quick Start	
😞 My Work	
Q Customer Experience	
Production Schedule	
🛅 Calendar	2
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Shop Scheduling – Insurance Appointments, Continued

Accessing The calendar shows your location's Estimate Appointments. Click an Calendar, appointment to view additional information about that appointment. An continued Insurance Appointment will display "Booked by" with the insurance company name underneath the appointment time.

The Appointment view details include:

- Who booked the appointment. Booked by = Insurance Company.
- The assigned estimator.
- Vehicle and claim information.
- Actions to Edit, Complete or Cancel the appointment.



The customer will receive a notification if you or the insurance company update the appointment as long as the communication preference was setup on the workfile. The Insurance Company will not receive a notification if you change the appointment with the customer.

