



Job Aid

Manual Timeline Entry – Assignment Association

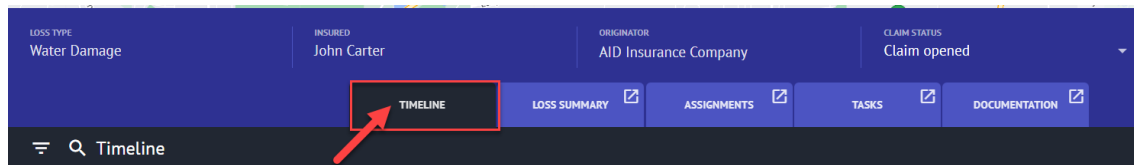
Issue 1
May 9th, 2023

Associating an Assignment to a Manual Timeline Entry

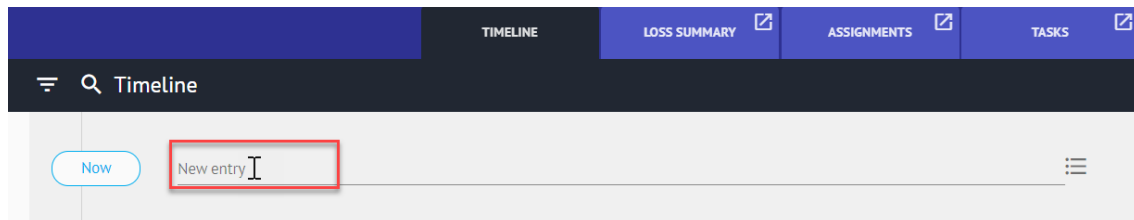
This job aid will guide you through the steps to associate an assignment to a manually created timeline entry in Claims Connect.

Note: This document was created using a demo insurance company with generic settings. Keep in mind that your screens may appear slightly different. Please refer to your specific carrier guidelines for proper claim and estimate settings.

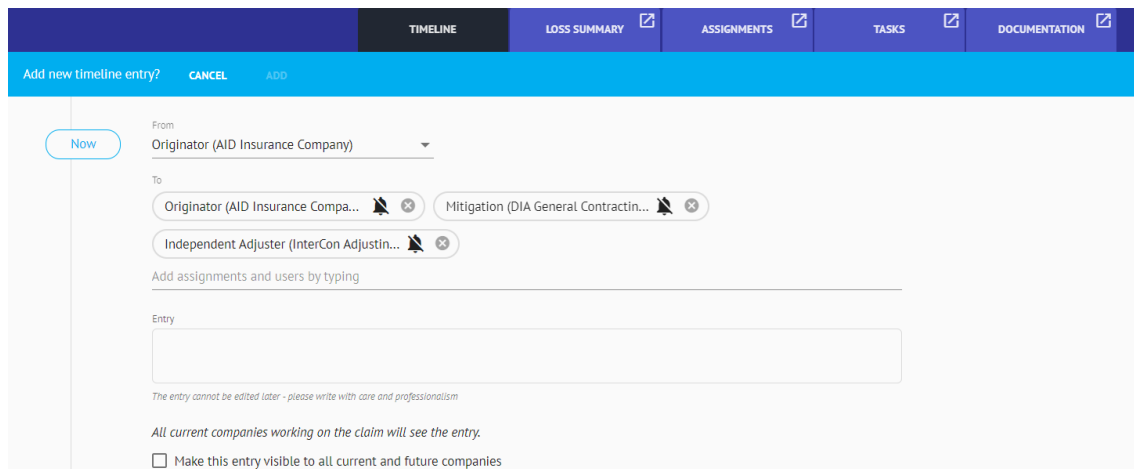
1. Within a claim that has one or multiple assignments previously created, navigate to the **Timeline**.



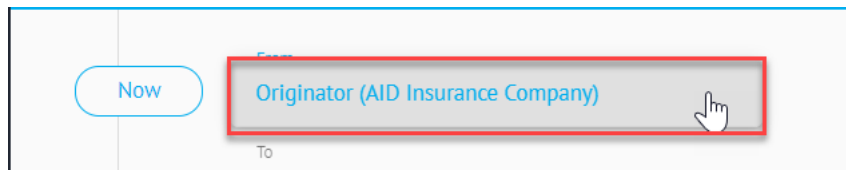
2. Start a new manual timeline entry by placing the cursor over **New Entry** and clicking.



3. The **New Timeline Entry** will open below.

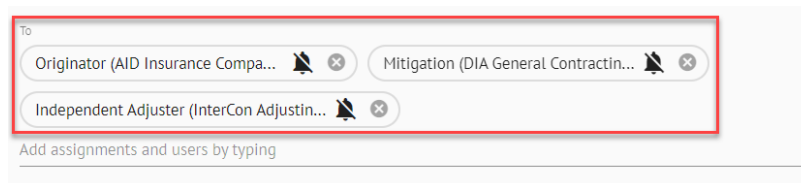


4. The **From** section will default to the assignment that you are working from. Any additional options based on your participation in the claim will be available to you in the dropdown menu. Select the **From Assignment** for the entry from the dropdown menu or leave the default as is.



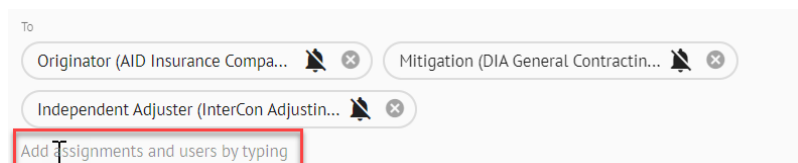
A screenshot of a software interface showing a dropdown menu for the 'From' field. The dropdown is open, displaying a list of options. The first option, 'Originator (AID Insurance Company)', is highlighted in grey and has a mouse cursor pointing at it. To the left of the dropdown is a button labeled 'Now'. Below the dropdown is a 'To' label.

5. The **To** section will auto-populate the intended recipient assignments of the timeline entry based on the Company Default Timeline Entry settings configured by company admin.



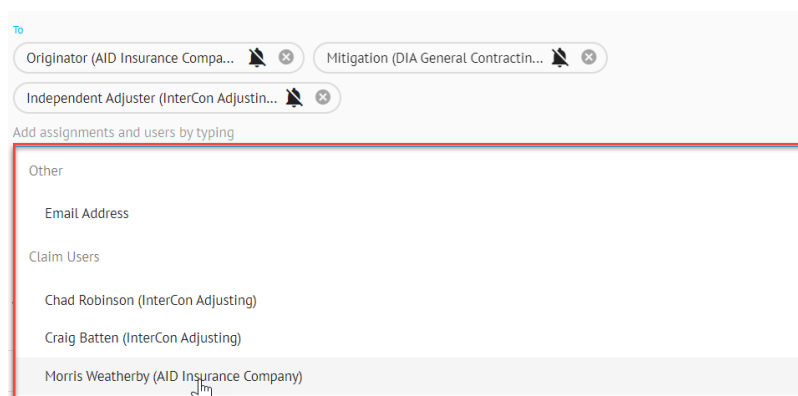
A screenshot of the 'To' section of the software interface. It shows three assigned recipients in a row: 'Originator (AID Insurance Company)', 'Mitigation (DIA General Contracting)', and 'Independent Adjuster (InterCon Adjusting)'. Each recipient has a small bell icon and a close button (X) to its right. Below the list is a text input field with the placeholder 'Add assignments and users by typing'.

To add additional assignments, users or recipients, click on **Add assignments and users by typing**.



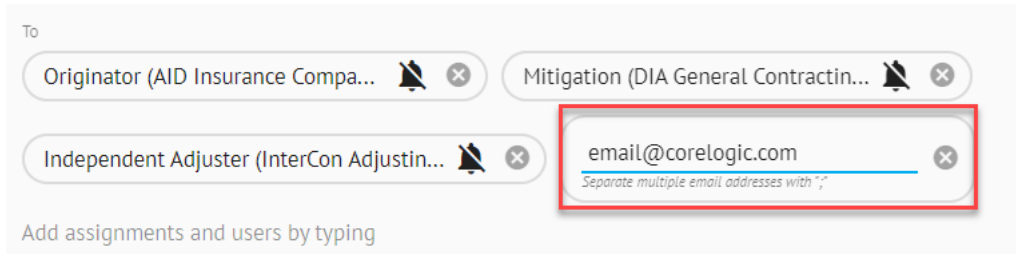
A screenshot of the 'To' section, similar to the previous one, but with a red box highlighting the 'Add assignments and users by typing' text input field at the bottom.

Select the additional recipients from the dropdown menu. Type to filter the list down.



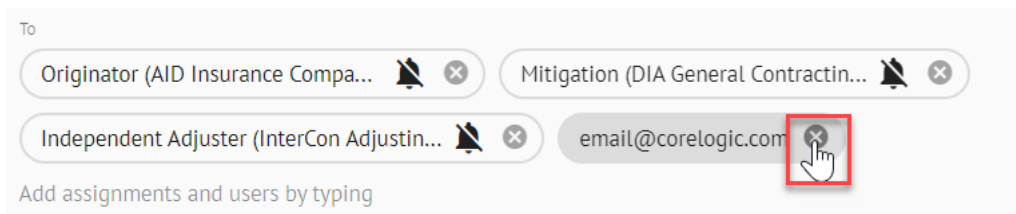
A screenshot of the dropdown menu that appears when the 'Add assignments and users by typing' field is clicked. The dropdown is titled 'To' and shows three assigned recipients at the top. Below them is a section titled 'Add assignments and users by typing' which contains a list of users. The list is categorized under 'Other' and includes 'Email Address', 'Claim Users', and a list of names: 'Chad Robinson (InterCon Adjusting)', 'Craig Batten (InterCon Adjusting)', and 'Morris Weatherby (AID Insurance Company)'. A mouse cursor is pointing at 'Morris Weatherby (AID Insurance Company)'.

If **Email Address** is selected, type in the email address(es) into the text field that populates. Multiple email addresses can be added using a “;” to separate.



The screenshot shows the 'To' field with three chips: 'Originator (AID Insurance Compa...', 'Mitigation (DIA General Contractin...', and 'Independent Adjuster (InterCon Adjustin...'. A fourth chip, 'email@corelogic.com', is being added and is highlighted with a red box. Below the chips is a text input field with the placeholder 'Add assignments and users by typing'.

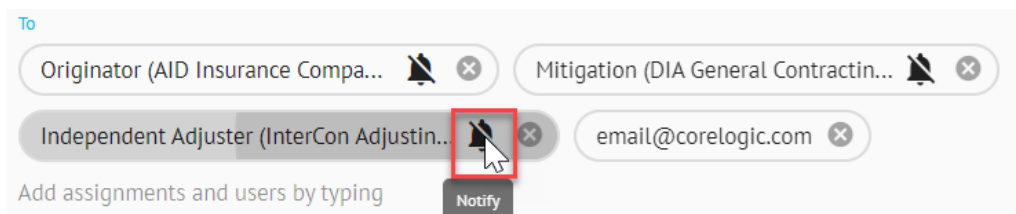
To remove any recipients from the **To** section, simply click the **X** within the chip.



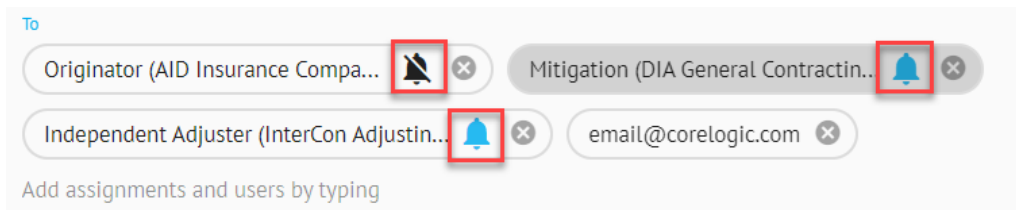
The screenshot shows the 'To' field with the same three chips as before. The 'email@corelogic.com' chip is now highlighted with a red box, and a hand cursor is pointing at the 'X' icon on its right side, indicating it is being removed. The text input field below still says 'Add assignments and users by typing'.

Note: If an assignment is removed from the **To** field, it will then display in the Add Assignment dropdown list to add it back.

- To send notification of the timeline entry to the recipients, toggle the **Notification Bell** to 'On', or blue. Toggle the **Bell** to 'Off', or black, to not send notifications.



The screenshot shows the 'To' field with the same three chips. The 'Independent Adjuster (InterCon Adjustin...' chip is highlighted with a red box, and a hand cursor is pointing at the black bell icon on its right side. A 'Notify' button is visible below the chips. The text input field below says 'Add assignments and users by typing'.



The screenshot shows the 'To' field with the same three chips. The bell icons on the 'Independent Adjuster (InterCon Adjustin...' and 'email@corelogic.com' chips are now blue, indicating notifications are turned on. The text input field below says 'Add assignments and users by typing'.

7. Type the timeline entry into the **Entry** text field.

Entry

Please contact the insured at their work number during the hours of 9a-5p.

The entry cannot be edited later - please write with care and professionalism

8. To make the entry visible to all current and future companies, check the box.

All current companies working on the claim will see the entry.

☒ Make this entry visible to all current and future companies

Note: *The italicized sentence above indicating who will see the entry will update automatically based on what assignments are included in the To field or if the check box is checked.*

9. Click **Add** to add the timeline entry to the claim. Click **Cancel** to discard.

Add new timeline entry? CANCEL ADD

10. The entry will now be visible in the Timeline. Click the '...', then click **View Details** to see more details of the entry.

TODAY May 9, 2023

2:37 pm Morris Weatherby AID Insurance Company Please contact the insured at their work number during the hours of 9a-5p. ...

9:35 am Morris Weatherby AID Insurance Company Chad Robinson (InterCon Adjusting) added as a new participant (assignment "Independent Adjuster"). View details

11. A blade will slide out from the right and display all the details of the timeline entry.

Timeline Entry

TODAY May 9, 2023 - 2:37 PM

AUTHOR

Morris Weatherby AID Insurance Company

FROM

Originator AID Insurance Company

ENTRY

Please contact the insured at their work number during the hours of 9a-5p.

TO

Originator AID Insurance Company

email@corelogic.com

This entry is visible to all current and future companies.



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