CoreLogic[®]

Job Aid

Manually Lock Forms – Claims Connect

Issue 1 August 9, 2023

Manually Lock Forms in Claims Connect

This job aid will guide a user with ownership of a form through the steps to manually lock a form. A user with ownership of a form can be one of the following:

- A participant of the originator assignment
- An assignee that created the form within their assignment
- An assignee that was assigned to a form by the claim originator
- A claim participant that was given 'Write' permissions to the form via the share function from the form creator

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, navigate to the Documentation page by clicking on the **Documentation tab.**

LOSS TYPE Windstorm Damage	INSURED John Stillwater	oriiginator AID Insurance		CLAIM STATUS Claim contacted		•	claim created 9 days ago		
	TIMELINE		ASSIGNMENTS	Z	tasks [Z,	DOCUMENTATION	Z	
÷ ९ Timeline									
								TIMELINE	~

2. Scroll down or click on **Forms** from the menu on the left to view the any forms that have been added to the claim.

			ASSIGNMENTS	TASKS	DOCUMENTATI	on 🖸	
All Documentation	All Documentation	GROL	P BY: Object type	•	= =		
V Estimates 2	Estimates				^	DOCUMENTATION Add photos	^
V Diagrams 1	IN PROGRESS	IN PROGRE	is			Add document	
✓ Photos				Σ		Print	
Videos	\$0.00	A	\$0.00	\$0.00		ASSIGNMENTS	~
Forms 2	Structure AID Insurance	*** Emergency AID Insurar	*** rce	Claim Totals AID Insurance		INTEGRATIONS	* *
Documents						міяс	~
Quotes	Diagrams				^		



3. Open a form that you have ownership of by clicking on the form from the **All Documentation** menu or from the tile in the Forms section.

All Documentation	Forms	GROUP BY:	Object type	•	
V Estimates 2					
∨ Diagrams 1	Construction C				
✓ Photos					
Videos	Property Loss Notice Im	Daily Moisture Activity Adjusters 4 U			
Forms 2					
Property Loss Notice AID Insurance					
Daily Moisture Activi Adjusters 4 U					

4. Once the form is opened, click on the **Ellipsis button** in the upper right.

	EDIT	SHARE ••••
		J
DATE (MM/DD/YY) 07/26/23		
LOSS AND TIME PREVIOUSLY REPORTED		

5. From the Ellipsis menu, select Lock form.





Note: Lock form can also be accessed from the Ellipsis menu directly on the tile in the Forms section of the Documentation tab.



If you do not have ownership of a form, the **Lock form** option will not present on any menu.

6. A confirmation window will open next, click **Lock** to proceed with locking the form. Clicking **Cancel** will end the process.

Lock this form? Once locked, the form car unlocked.	not be edited	or
	CANCEL	LOCK

7. An operation status dialog window will then display. It will clear on its own or click **Dismiss** to hide the window sooner.



8. When a form has been locked, it will display a lock symbol in the upper right of the tile.



CoreLogic[,]

9. As manually locked forms cannot be unlocked or edited, click **Duplicate form** from the Ellipsis menu to create a duplicate version of the form to open, edit, save and then lock, if desired.

Forms	GROUP BY: Object ty	/ре 🔻
Adjusters 4 U	Marcal and another and another	
		Delete Duplicate form Open in a new tab

About CoreLogic

CoreLogic is the leading provider of property insights and solutions, promotes a healthy housing market and thriving communities. Through its enhanced property data solutions, services and technologies, CoreLogic enables real estate professionals, financial institutions, insurance carriers, government agencies and other housing market participants to help millions of people find, buy and protect their homes. For more information, please visit corelogic.com.

For additional information, please visit Corelogic.com.

© 2023 CoreLogic, Inc. All rights reserved.

CORELOGIC and the CoreLogic logo are trademarks of CoreLogic, Inc. and/or its subsidiaries. All other trademarks are the property of their respective holders.

CoreLogic[,]