



# 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:

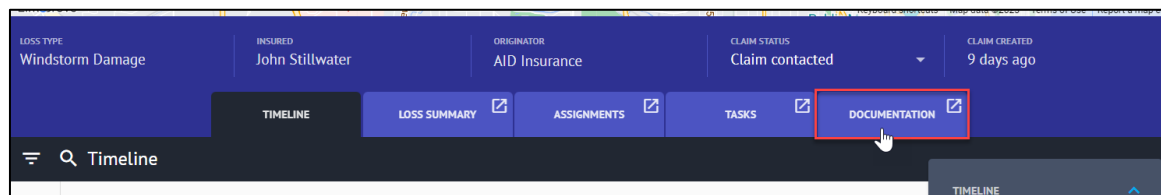
- A participant of the originator assignment
- An assignee that created the form within their assignment
- An assignee that was assigned to a form by the claim originator
- A claim participant that was given 'Write' permissions to the form via the share function from the form creator

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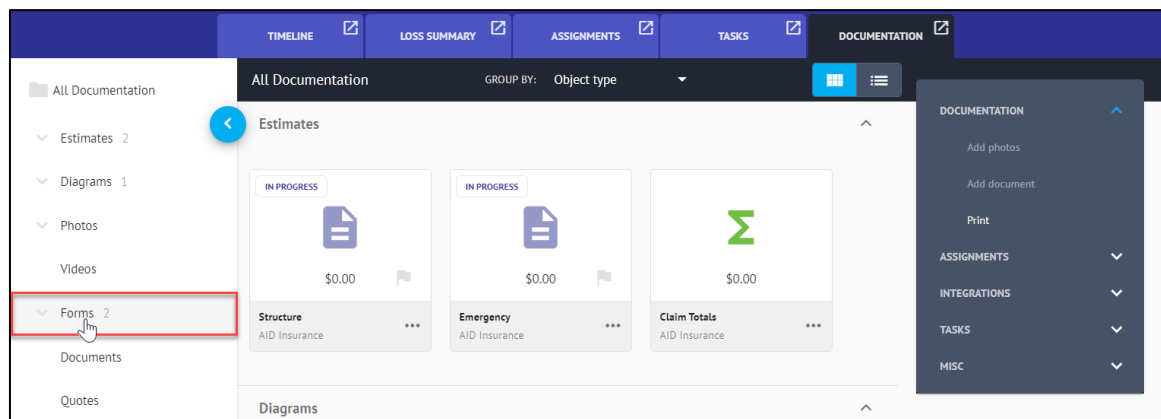
**Note:** This document was created using a demo insurance company with generic settings. Keep in mind that your screens may appear slightly different. Please refer to your specific carrier guidelines for proper claim and estimate settings.

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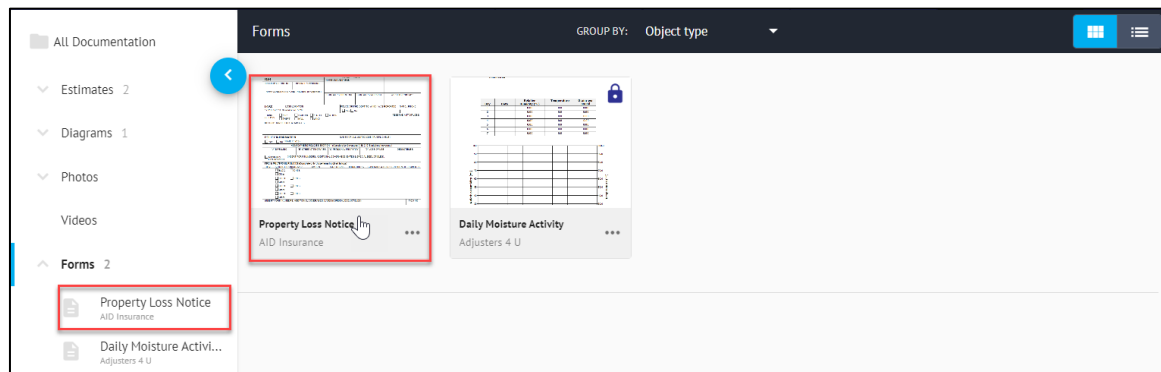
1. Within a claim, navigate to the Documentation page by clicking on the **Documentation tab**.



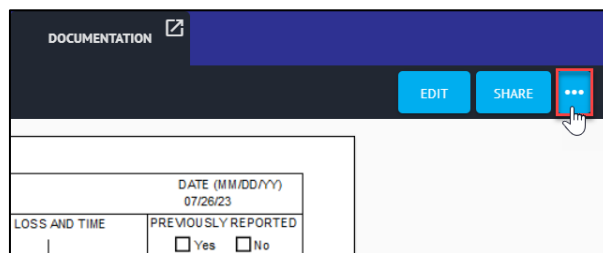
2. Scroll down or click on **Forms** from the menu on the left to view the any forms that have been added to the claim.



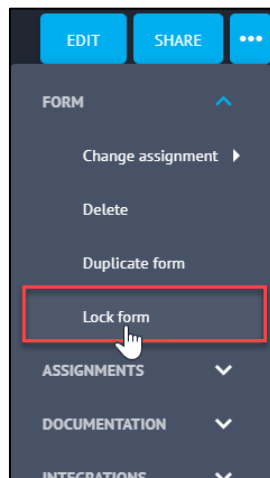
3. Open a form that you have ownership of by clicking on the form from the **All Documentation** menu or from the tile in the Forms section.



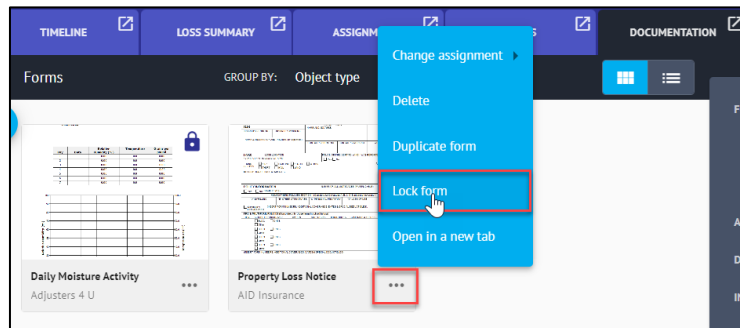
4. Once the form is opened, click on the **Ellipsis button** in the upper right.



5. From the Ellipsis menu, select **Lock form**.

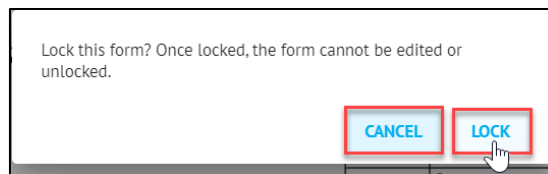


**Note:** Lock form can also be accessed from the Ellipsis menu directly on the tile in the Forms section of the Documentation tab.

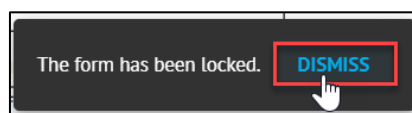


If you do not have ownership of a form, the **Lock form** option will not present on any menu.

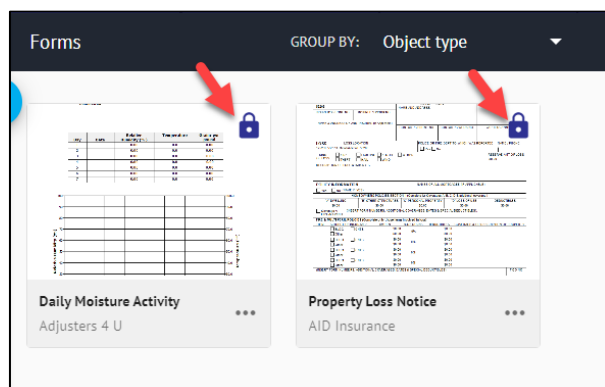
6. A confirmation window will open next, click **Lock** to proceed with locking the form. Clicking **Cancel** will end the process.



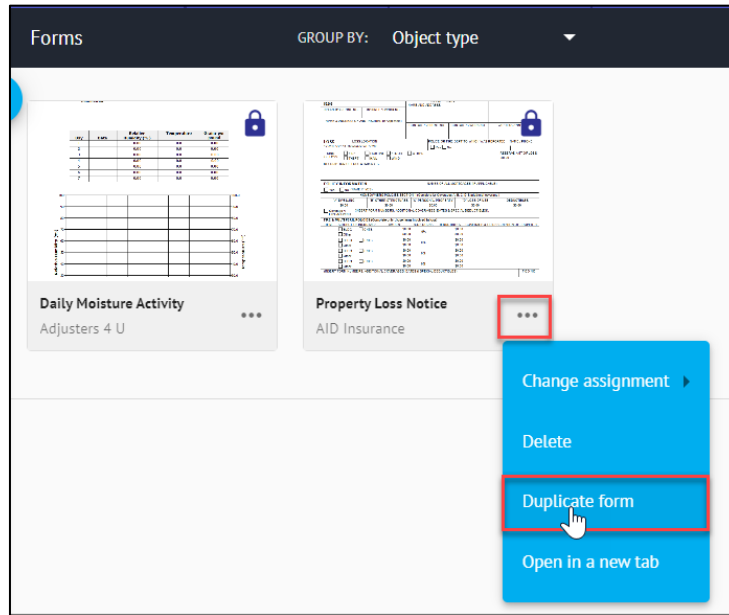
7. An operation status dialog window will then display. It will clear on its own or click **Dismiss** to hide the window sooner.



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



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.





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