CoreLogic®

Job Aid

Manual Timeline Entry – Assignment Association

# 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 Mobile Claims.

> **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** from the Claim Explorer.
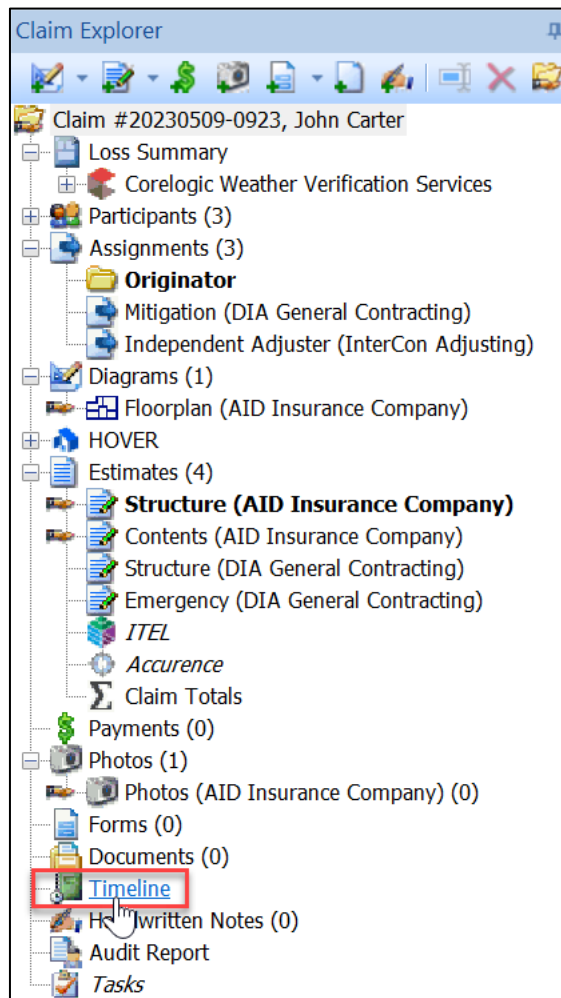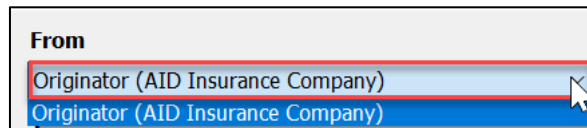
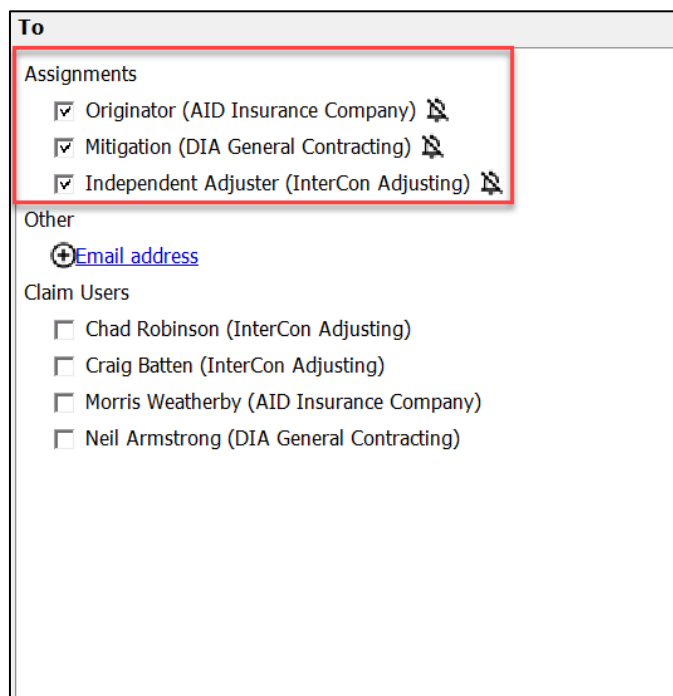2. Start a new manual timeline entry by clicking **Add Manual Entry**.
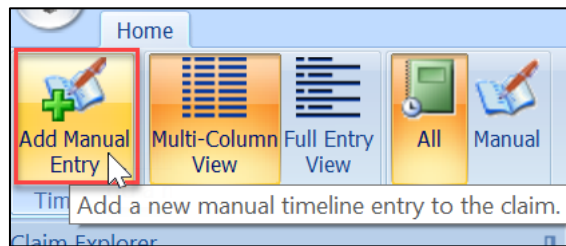
3. The **Create Manual Timeline Entry** window will open.

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.

From
Originator (AID Insurance Company)
Originator (AID Insurance Company)
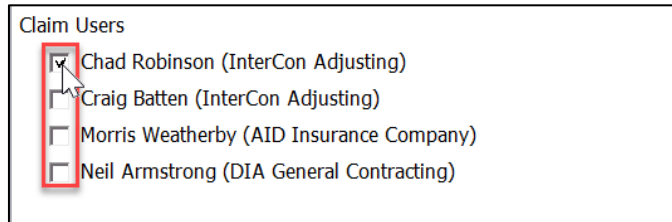
5. The **To** section will display all assignments and claim users associated with the claim. Company Default Timeline Entry settings configured by company admin will determine which assignments' boxes are automatically checked when the window opens.

To

Assignments
- ☑ Originator (AID Insurance Company)
- ☑ Mitigation (DIA General Contracting)
- ☑ Independent Adjuster (InterCon Adjusting)

Other
- ⊕ Email address

Claim Users
- ☐ Chad Robinson (InterCon Adjusting)
- ☐ Craig Batten (InterCon Adjusting)
- ☐ Morris Weatherby (AID Insurance Company)
- ☐ Neil Armstrong (DIA General Contracting)

To add additional assignments, users or recipients, simply check the box next to the name.

Claim Users
- ☑ Chad Robinson (InterCon Adjusting)
- ☐ Craig Batten (InterCon Adjusting)
- ☐ Morris Weatherby (AID Insurance Company)
- ☐ Neil Armstrong (DIA General Contracting)

To add a recipient using their email address, click **Email Address.**
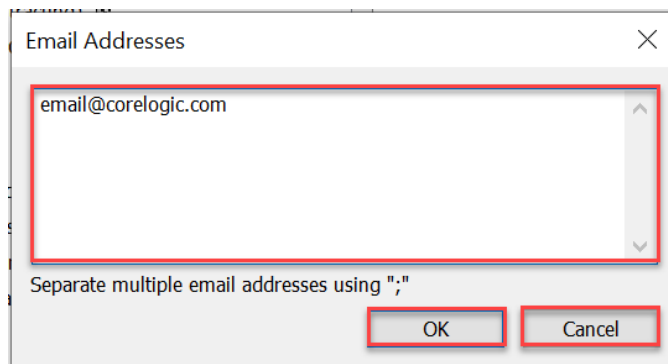
☑ Independent Adjuster (InterCon Adjusting)

Other
⊕ Email address

Claim Users
- ☑ Chad Robinson (InterCon Adjusting)
- ☐ Craig Batten (InterCon Adjusting)

Then type the email address(es) into the text field in the **Email Addresses** *window. Multiple email addresses can be added using a ";" to separate. Click* **OK** *to save & exit or* **Cancel** *to discard & exit.*

Email Addresses   ✕

email@corelogic.com

Separate multiple email addresses using ";"

OK   Cancel

*To remove any recipients from the **To** section, simply uncheck the box next to the assignment/user.*

```
To
Assignments
   ☑ Originator (AID Insurance Company) 🔕
   ☐ Mitigation (DIA General Contracting)
   ☑ Independent Adjuster (InterCon Adjusting) 🔕
```

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

```
To
Assignments
   ☑ Originator (AID Insurance Company) 🔕
   ☑ Mitigation (DIA General Contracting) 🔔
   ☑ Independent Adjuster (InterCon Adjusting) 🔔
```

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

```
Entry                                    QuickList
Please contact the insured at their work number during the hours
of 9a to 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.
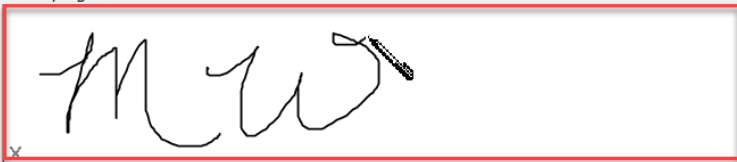
☐ Visible for all current and future companies

Note: *The italicized sentence above indicating who will see the entry will update automatically based on what assignments are checked in the To field or if the 'Visible for all current and future companies' box is checked.*

9. To add a signature to the timeline entry, click **Capture Signature**, then sign the name in the freeform field, and click **Accept**.

Sign	?	✕

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

Please, sign here:

edited later - please write with ca

Capture Signature...

⦿ Send immediately

Erase   Accept   Cancel

10. Adjust the Timeline Entry's **Send** settings, if needed, then click **OK** to add the timeline entry to the claim. Click **Cancel** to discard.

○ Send immediately if connected
⦿ Send upon next synchronization

OK   Cancel

CoreLogic®

11. The entry will now be visible in the Timeline. Double click on the timeline entry to view details of the entry.

Date/Time ▼	Details	Author
05/11/2023 3:54 PM	Please contact the insured at their work number during the hours of 9a to 5p.	Morris Weatherby / AID Insurance Company
05/11/2023 10:53 AM	Claim ownership acquired.	Morris Weatherby (AID Insurance Company)
05/09/2023 4:02 PM	Veuillez ne pas téléphoner à Mme Carter au travail.	Morris Weatherby (AID Insurance Company)

Date/Time ▼

05/11/2023 3:54 PM   Morris Weatherby / AID Insurance Company
Please contact the insured at their work number during the hours of 9a to 5p.

05/11/2023 10:53 AM   Morris Weatherby (AID Insurance Company)
Claim ownership acquired.

05/09/2023 4:02 PM   Morris Weatherby (AID Insurance Company)

12. The **Timeline Entry Properties** window will open and display all the details of the timeline entry.

Timeline Entry Properties ✕

Date/Time: 05/11/2023 3:54 PM
By: Morris Weatherby / AID Insurance Compa
From: Originator (AID Insurance Company)

This entry was entered manually

To

Originator (AID Insurance Company)
Mitigation (DIA General Contracting)*
Independent Adjuster (InterCon Adjusting)*
email@corelogic.com
Chad Robinson (InterCon Adjusting)

* Notified

Entry

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

Visible To

AID Insurance Company
DIA General Contracting
InterCon Adjusting

OK

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.

CoreLogic®