



Job Aid

Early Estimate Sharing - Claims Connect

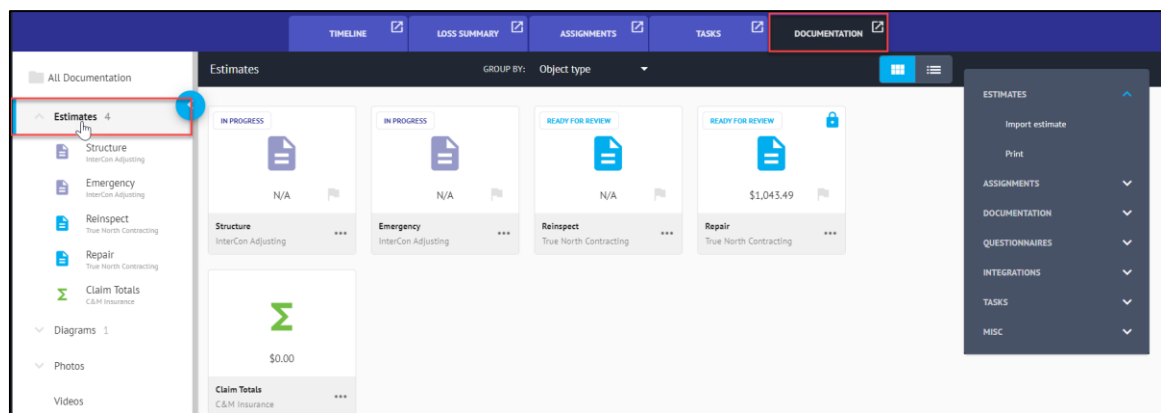
Issue 1
August 9, 2023

Early Estimate Sharing in Claims Connect

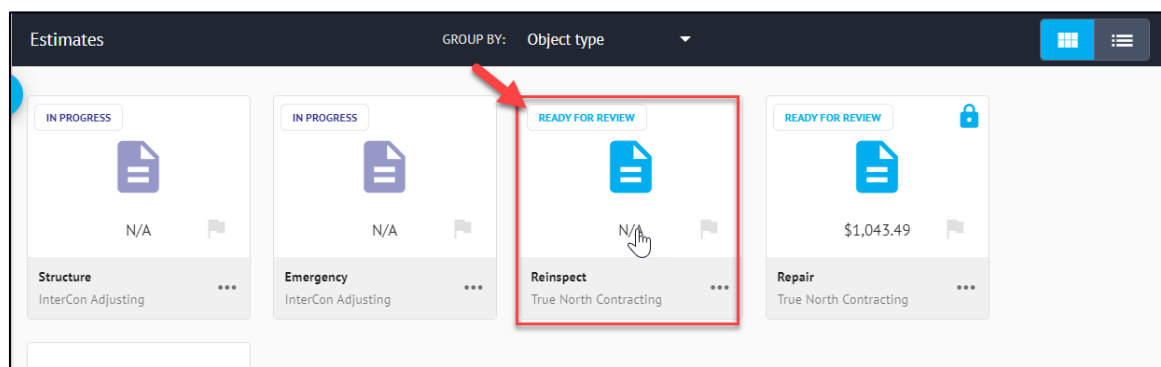
This job aid will guide an originator User through the steps to early share an assignee's estimate that has been marked at 'Ready for Review' status or higher. This is only available to originator companies that have had this feature enabled by their account manager.

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.

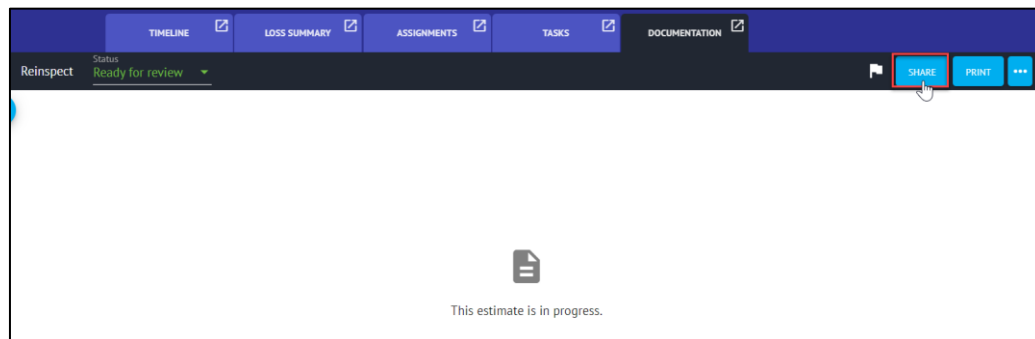
1. Within a claim, navigate to the **Estimates** within the **Documentation** page.



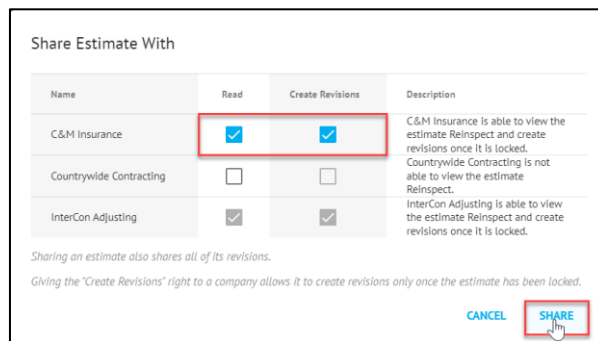
2. Click on the **Assignee's Estimate** that has been marked Ready for Review (or higher) to open.



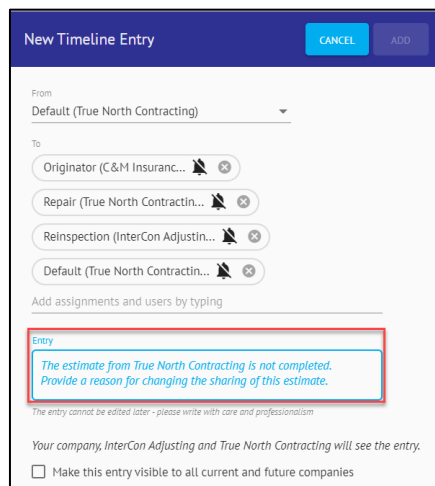
3. Click on the **Share** button from the Estimate View screen.



4. The **Share Estimate With** window will open giving the available options for sharing. Check the **Create Revisions** box for the originator company which will automatically check both the Read and Create Revisions boxes, then click **Share** (**Cancel** will end the process).



5. A **New Timeline Entry** blade will open from the right. Type the reason for changing the sharing of the non-completed estimate into the **Entry** box and adjust the other settings of the Timeline Entry as needed.











6. Click **Add** to finalize the timeline entry and complete the process of early sharing the estimate. **Cancel** will end the process.

New Timeline Entry CANCEL ADD

From
Originator (C&M Insurance)

To

- Originator (C&M Insuranc...  
- Repair (True North Contractin...  
- Reinspection (InterCon Adjustin...  
- Default (True North Contractin...  

Add assignments and users by typing

Entry

Early sharing the Reinspect Estimate from True North Contracting to C&M Insurance due to claim escalation reasons and untimely responses from Intercon Adjusting.

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

Your company, InterCon Adjusting and True North Contracting will see the entry.

☐ Make this entry visible to all current and future companies



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