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Job Aid

Early Estimate Sharing – Mobile Claims
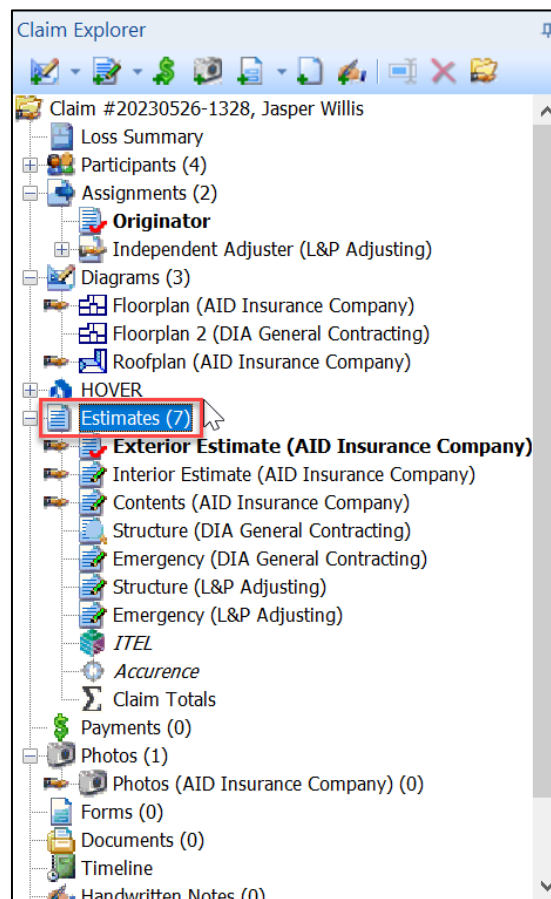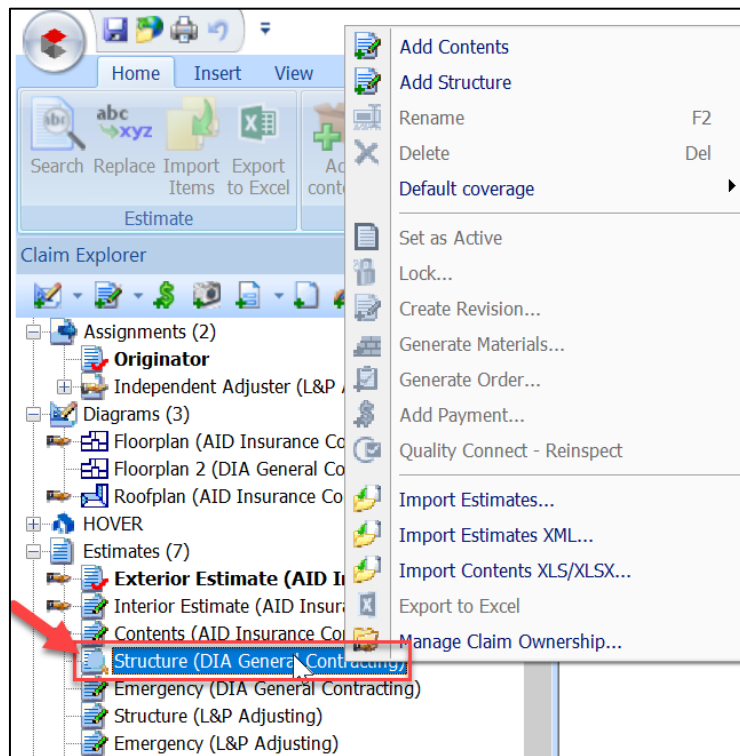
Early Estimate Sharing in Mobile Claims

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.*
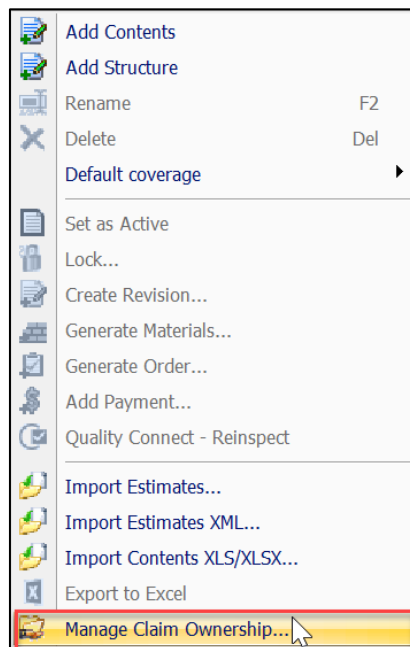
1. Within a claim that you have ownership of, navigate to the **Estimates** section of the Claim Explorer.
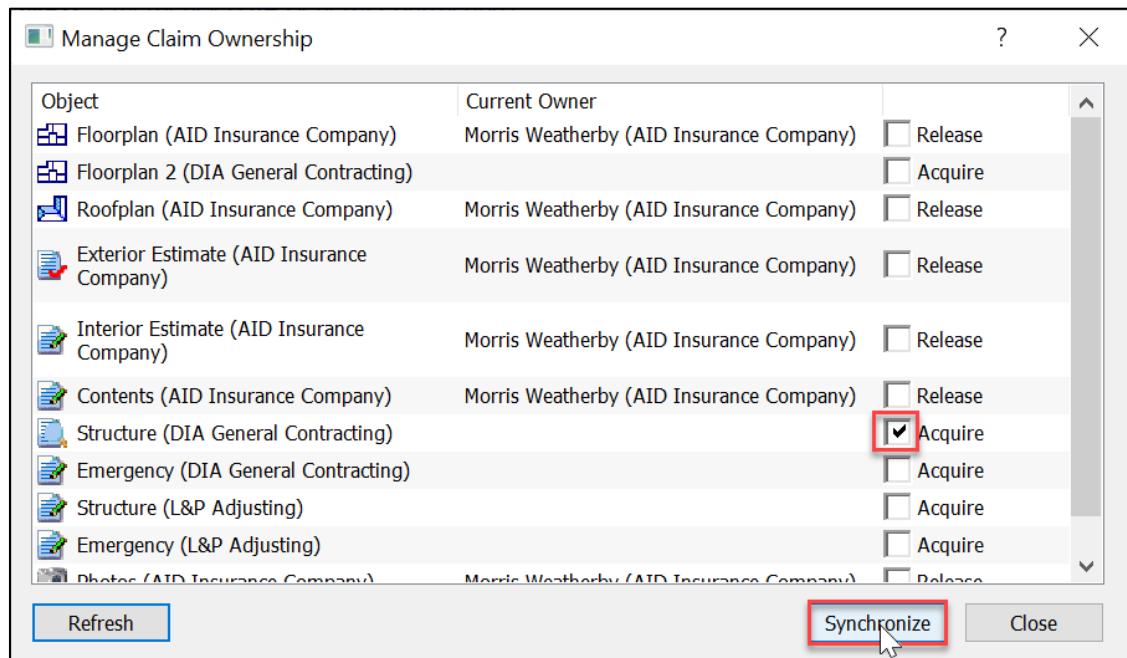
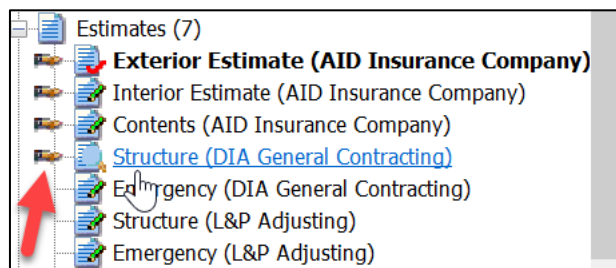2. Right click on the assignee's estimate that has been marked Ready for Review (or higher).

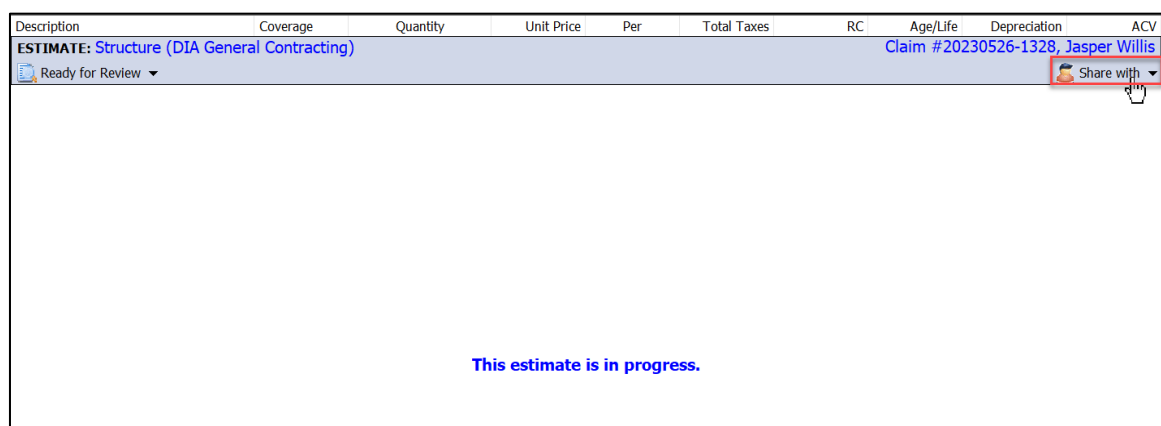3. Click on **Manage Claim Ownership** from the menu.

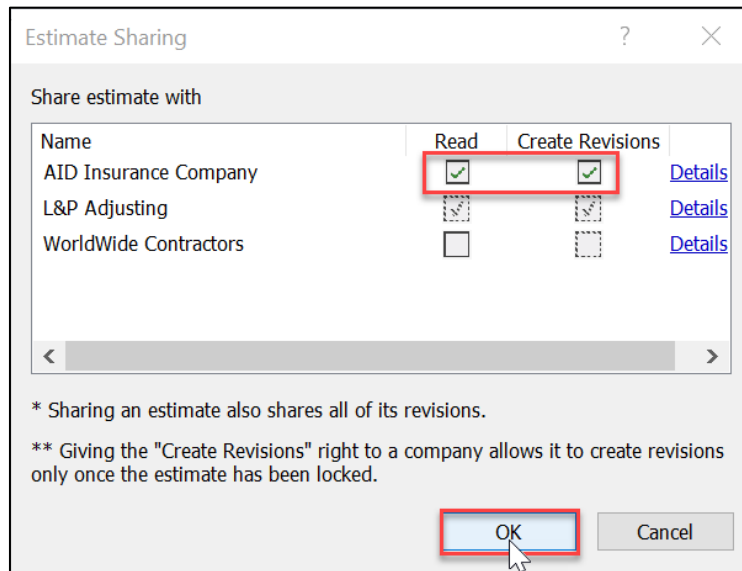4. Check the box next to **Acquire** for the assignee estimate and click **Synchronize.**

5. Ownership of the estimate is now displayed next to the assignee estimate in the Claim Explorer. Click on the **Estimate** to open.
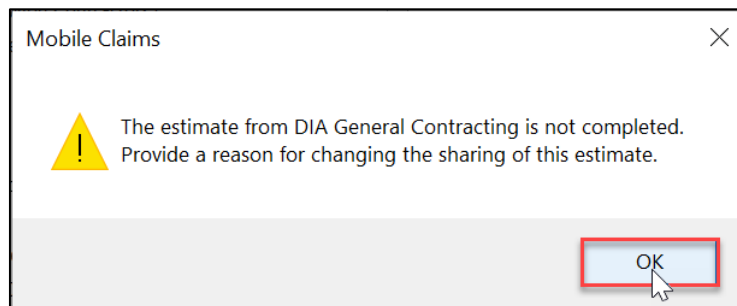

6. Click on **Share with** from the Estimate page.

7. The Estimate Sharing 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 **OK.** (**Cancel** will end the process.)

8. A dialog box will open, along with the Create Manual Timeline Entry window. Click **OK** to close the dialog.

9. 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. Click **OK** to finalize the timeline entry.

10. A confirmation dialog will present. Click **Yes** to continue. Click **No** to cancel the process.

11. Click on the **Estimate** from the Claim Explorer to open it and proceed with necessary workflow.

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