



# Job Aid

**Early Estimate Sharing – Mobile Claims**

Issue 1  
August 9, 2023

# Early Estimate Sharing in Mobile Claims

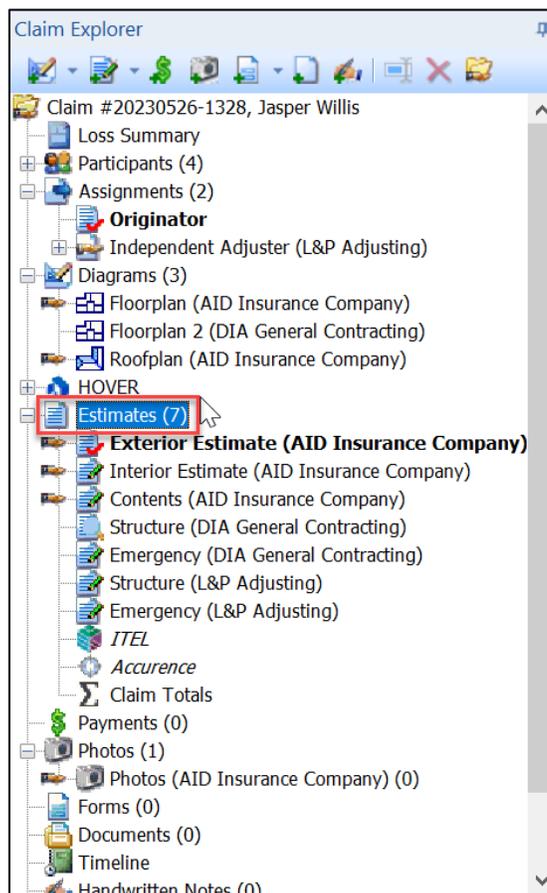
This job aid will guide an originator user through the steps to early share an assignee's estimate that has been marked at 'Ready for Review' status or higher. This is only available to originator companies that have had this feature enabled by their account manager.

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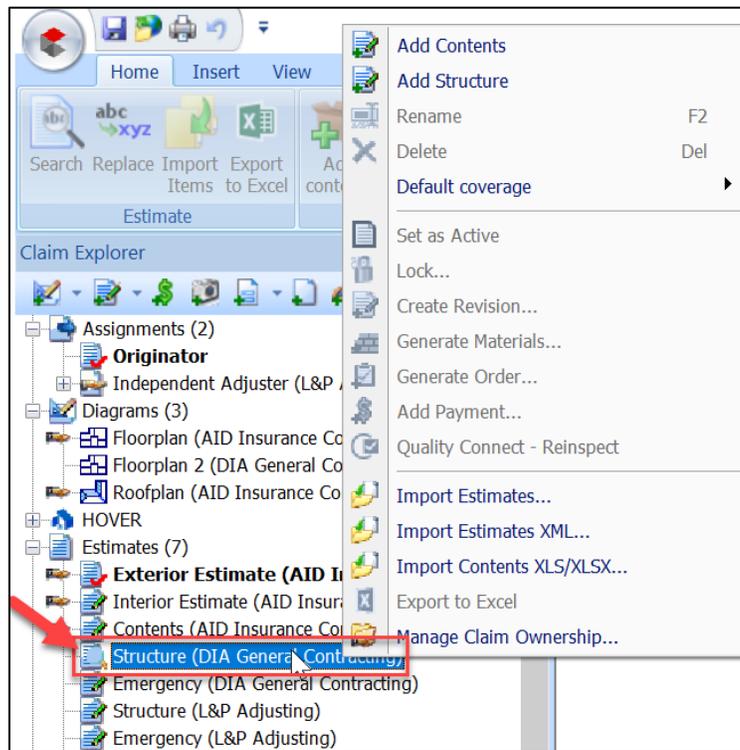
**Note:** This document was created using a demo insurance company with generic settings. Keep in mind that your screens may appear slightly different. Please refer to your specific carrier guidelines for proper claim and estimate settings.

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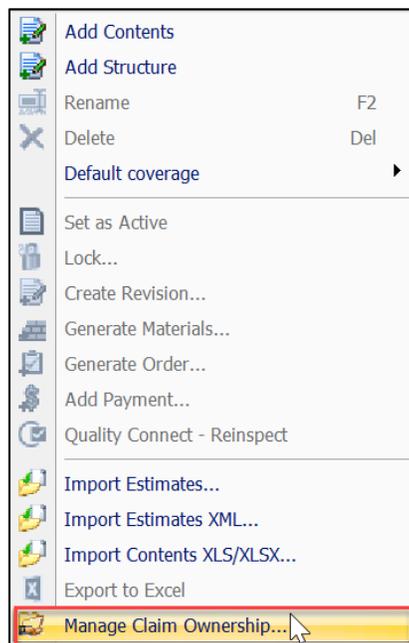
1. Within a claim that you have ownership of, navigate to the **Estimates** section of the Claim Explorer.



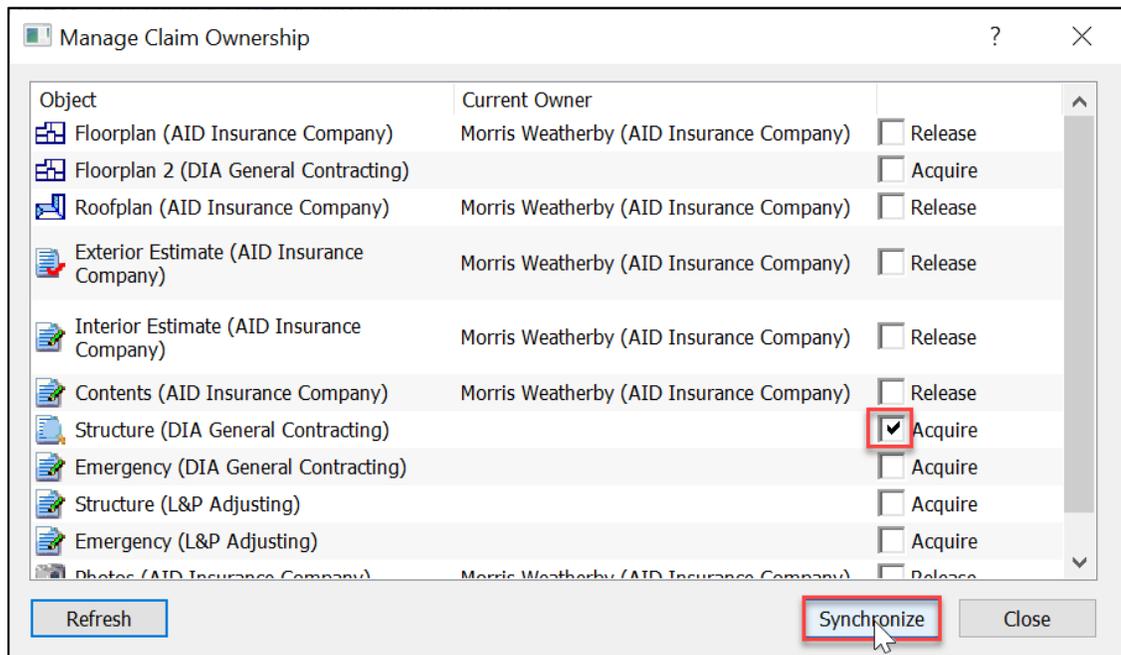
2. Right click on the assignee's estimate that has been marked Ready for Review (or higher).



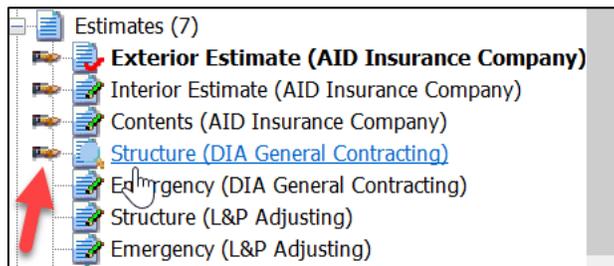
3. Click on **Manage Claim Ownership** from the menu.



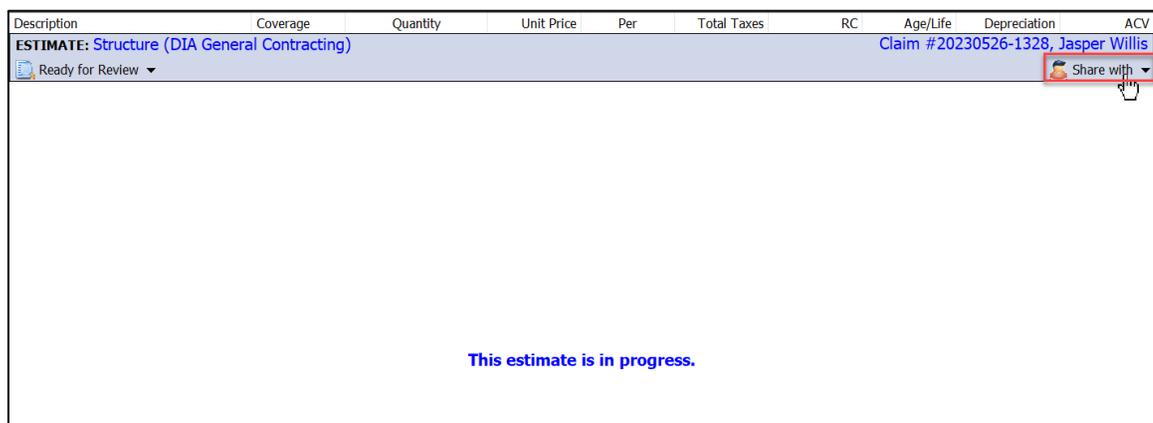
4. Check the box next to **Acquire** for the assignee estimate and click **Synchronize**.



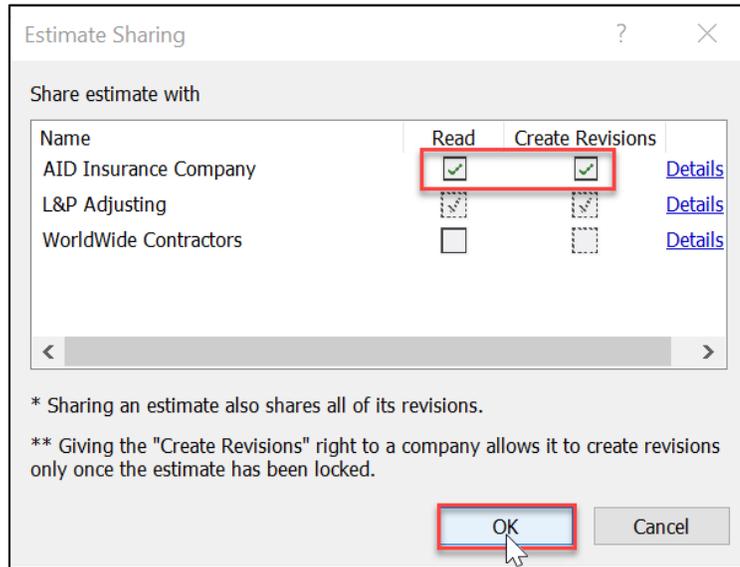
5. Ownership of the estimate is now displayed next to the assignee estimate in the Claim Explorer. Click on the **Estimate** to open.



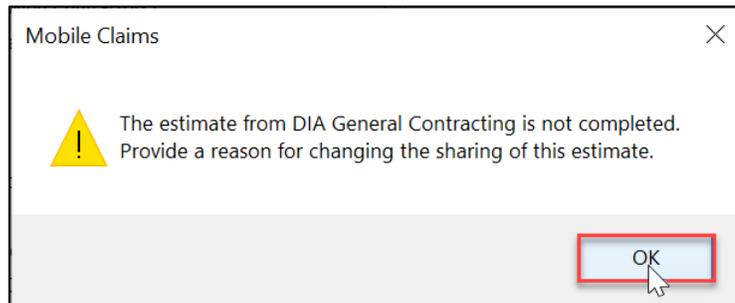
6. Click on **Share with** from the Estimate page.



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.

Create Manual Timeline Entry

**From**  
Repair - Repair (DIA General Contracting)

**To**

Assignments

- Originator (AID Insurance Company)
- Independent Adjuster (L&P Adjusting)
- Repair - Repair (WorldWide Contractors)
- Repair - Repair (DIA General Contracting)

Other

- [+Email address](#)

Claim Users

- Linda Morrison (L&P Adjusting)
- Morris Weatherby (AID Insurance Company)
- Neil Armstrong (DIA General Contracting)
- Sue Weir (WorldWide Contractors)
- Tina Turner (L&P Adjusting)

*Your company, DIA General Contracting and LP Adjusting will see the entry.*

Visible for all current and future companies

**Entry** [QuickList](#)

Early sharing the Structure Estimate from DIA General Contracting to AID Insurance due to claim escalation reasons and untimely responses from L&P Adjusting.

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

Capture Signature...

Send immediately if connected  
 Send upon next synchronization

**OK** Cancel

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

Mobile Claims

? Sharing the estimate requires that you save your current claim changes. Do you want to continue?

**Yes** No

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

The screenshot displays the 'Claim Explorer' application. The main window shows an estimate for 'ESTIMATE: Structure (DIA General Contracting)'. The left-hand navigation pane lists various claim components, with 'Structure (DIA General Contracting)' highlighted in red. The main content area shows details for 'FLOORPLAN: Floorplan 2' and 'Master Bedroom', including dimensions (Length: 24'6", Width: 22', Height: 8' Flat) and area calculations for Walls, Doors, Windows, Openings, Missing Walls, Floor, Ceiling, Perim (F), and Perim (C). Below this, a table lists 'INSULATION ITEMS', 'CEILING COVERING ITEMS', and 'SURFACE FINISH ITEMS' with columns for Description, Quantity, Unit Price, Per, Total Taxes, RC, Age/Life, Depreciation, and ACV. The 'Estimate' tab is selected at the bottom.

Description	Quantity	Unit Price	Per	Total Taxes	RC	Age/Life	Depreciation	ACV
<b>INSULATION ITEMS</b>								
1 Insulation, Ceiling, Batt, Unfaced 12" - Tear Out	539.00	\$0.24	SF	\$0.00	\$129.36	10/100	\$12.94	\$116.42
2 Insulation, Ceiling, Batt, Unfaced 12" - Replace	539.00	\$2.17	SF	\$48.92	\$1,169.63	10/100	\$116.96	\$1,052.67
<b>CEILING COVERING ITEMS</b>								
3 Drywall, Ceiling 5/8", Taped - Tear Out	539.00	\$0.33	SF	\$0.00	\$177.87	10/75	\$23.71	\$154.16
4 Drywall, Ceiling 5/8", Taped - Replace	565.95	\$2.81	SF	\$20.23	\$1,590.32	10/75	\$211.99	\$1,378.33
Includes 5% waste on quantity calculated by Rollout Calculator.								
<b>SURFACE FINISH ITEMS</b>								
5 Texture, Ceiling, Knockdown - Replace	539.00	\$0.63	SF	\$0.59	\$339.57	10/25	\$135.83	\$203.74



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