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Job Aid

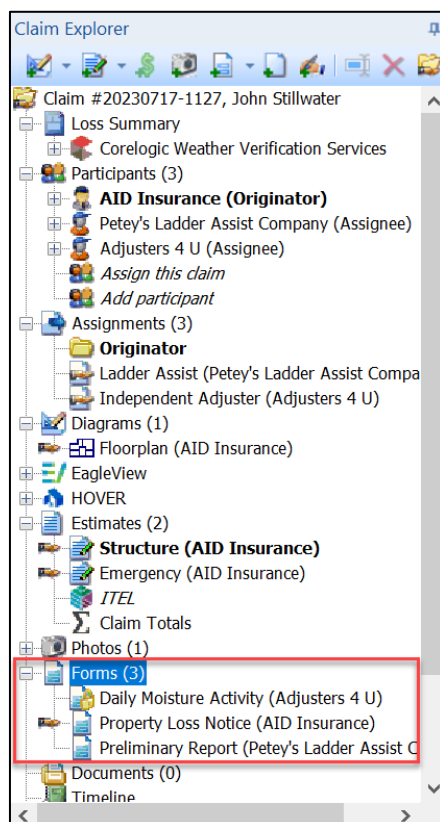**Manually Lock Forms - Mobile Claims**

Manually Lock Forms in Mobile Claims

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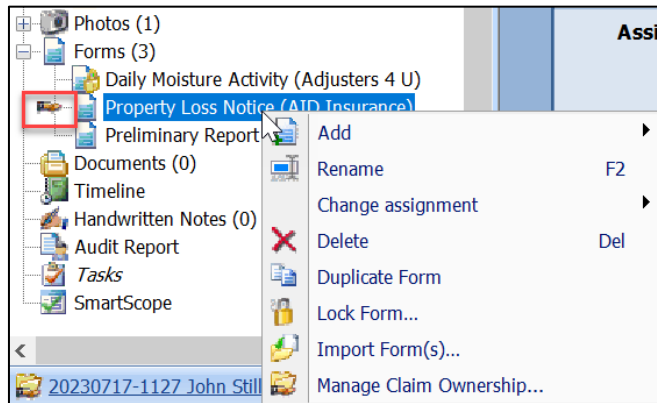
- A participant of the originator assignment
- An assignee that created the form within their assignment
- An assignee that was assigned to a form by the claim originator
- A claim participant that was given 'Write' permissions to the form via the share function from the form owner

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.*
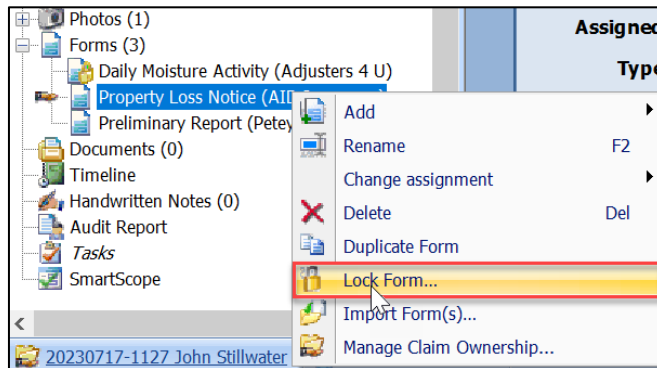
1. Within a claim, navigate down to the **Forms** section of the Claim Explorer.
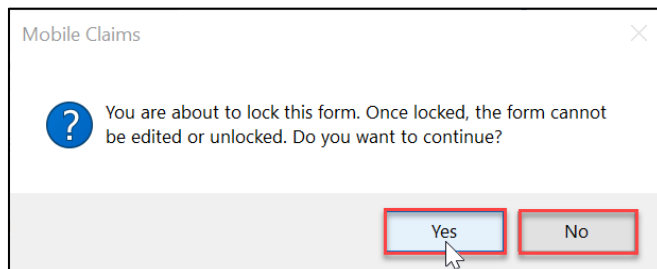
2. Right click on a form that you have ownership of (indicated by the hand next to the form) and that is completed.
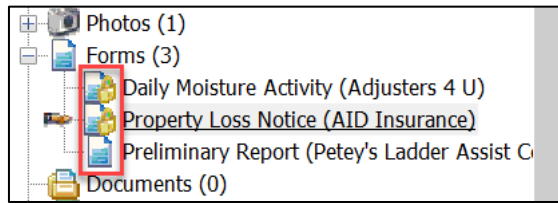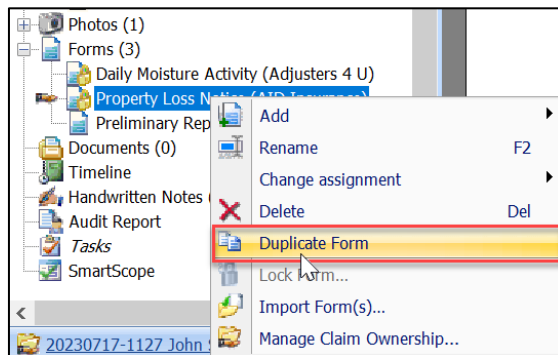

3. Click **Lock Form** from the dropdown menu.

4. A confirmation window will open next. Click **Yes** to proceed with locking the form. Clicking **No** will cancel the process.

5. When a Form has been locked, it will display a lock symbol on the form icon in the Claim Explorer.

6. As manually locked forms cannot be unlocked or edited, click **Duplicate form** from the dropdown menu to create a duplicate version of the form to open, edit, save and then lock, if desired.

About CoreLogic

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