

### SYNCHRONIZING & OWNERSHIP

When a user logs into Mobile Claims, the first thing they should do is click on Synchronize. Remember you must be connected to the Internet when synchronizing. At this point, synchronize will pull in any new information, such as updates to the software and new claim assignments.



Users should synchronize multiple times throughout the day, particularly when acquiring and releasing ownership. Ownership is what allows a user to edit a claim. If you do not have ownership of a claim you will be able to see all the claim details, but you will not be able to make any changes.

#### How can you tell if you have ownership of a claim?

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Home View Misc				
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Claim No, 🔺	Claim Status	Type of Loss	Policy No.	Assignment Status
🛚 🧱 GL-FB53714-20201214-11	Claim Opened	Fire Damage	GL-FB53714-2020	hi.
9 🛄 GL-FB53714-20201214-12	Claim Opened	Fire Damage	GL-FB53714-2020	
🗄 🚞 GL-FB53714-20201214-13	Claim Opened	Fire Damage	GL-FB53714-2020	
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If you see an icon that looks like a small hand underneath the manila folder, this is a visual indicator that you have ownership. Also notice that the option Acquire Ownership in the menu is grayed out. This is another visual indicator that you already have ownership.



## **Claims Connect and Mobile Claims**



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	Home View	Misc						
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Claim	Temporary Claims*	Claim	C perce ciam	Ownership	Ownership Claim Syno	claim thronization	Participating	
	Claim No, 🔺		Claim Status	Type of Loss	Policy	No.	Assignm	ent Status
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HD	GL-FB53714-20201214	1-12	Claim Opened	Fire Damage	GL-FE	53714-2020	D	

In the above screenshot, the selected claim does not have the hand icon. This is a visual indicator that you do not have ownership. Notice that in the menu Acquire Ownership is an active option. When the option to Acquire Ownership is available, this means that you currently do not own the claim.

### Acquire Ownership

- **1**. Select the claim or claims you would like to acquire ownership.
- (Hold the CTRL key to select multiple claims at one time).
- 2. All claims selected will highlight in red.
- 3. Click the Acquire Ownership button in the ribbon.

4. The Synchronize button now has a red exclamation point. This red exclamation dot is a reminder that you need to synchronize.

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Home View Misc				
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Claim			Synchronization	
Claim No. 🔺	Claim Status	Type of Loss	Policy No.	Assignment Status
🗉 🚞 GL-FB53714-20201214-11	Claim Opened	Fire Damage	GL-FB53714-20	
B GL-FB53714-20201214-12	Claim Opened	Fire Damage	GL-FB53714-2020	

### **Releasing Ownership**

1. Select the claim or claims you would like to release ownership.

- (Hold the CTRL key to select multiple claims at one time).
- 2. All claims selected will highlight in red.
- 3. Click the Release Ownership button in the ribbon.

4. The Synchronize button now has a red exclamation point. This red exclamation dot is a reminder that you need to synchronize.



# **Claims Connect and Mobile Claims**