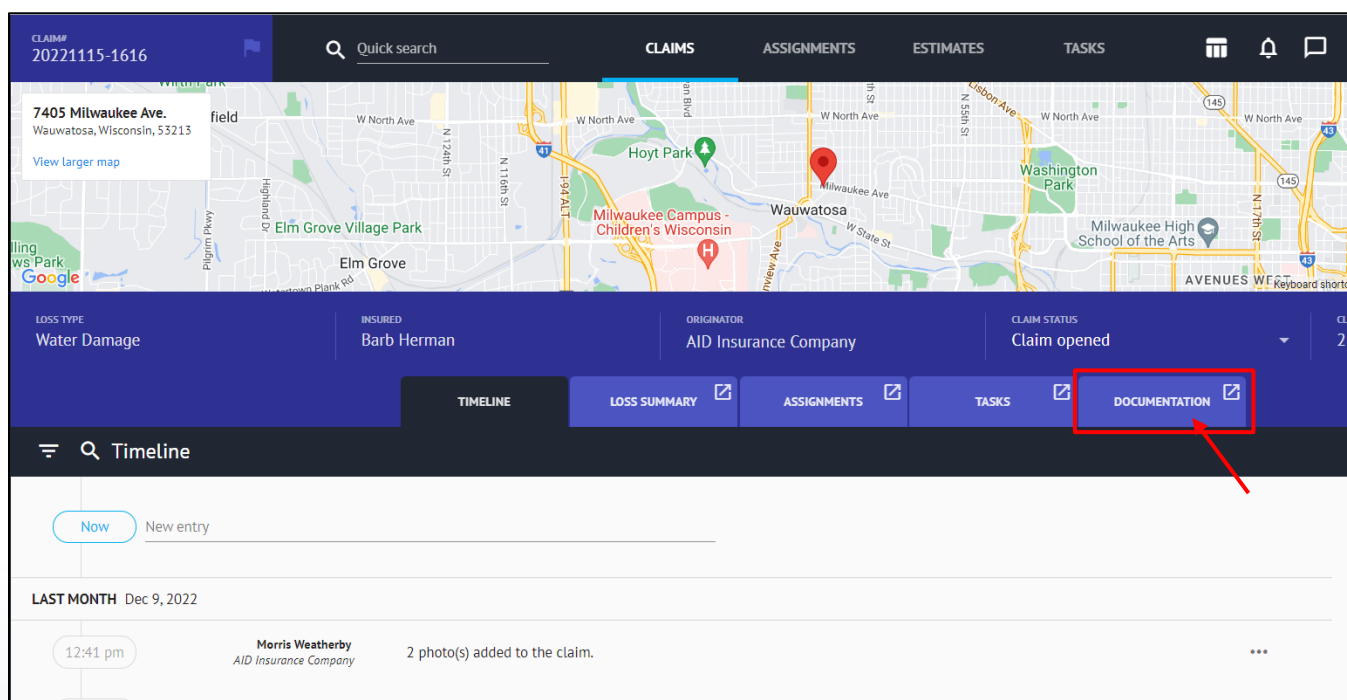CoreLogic®

'Replace with'

'Replace with' Option in Claims Connect

Disclaimer: This job aid 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.

Step 1
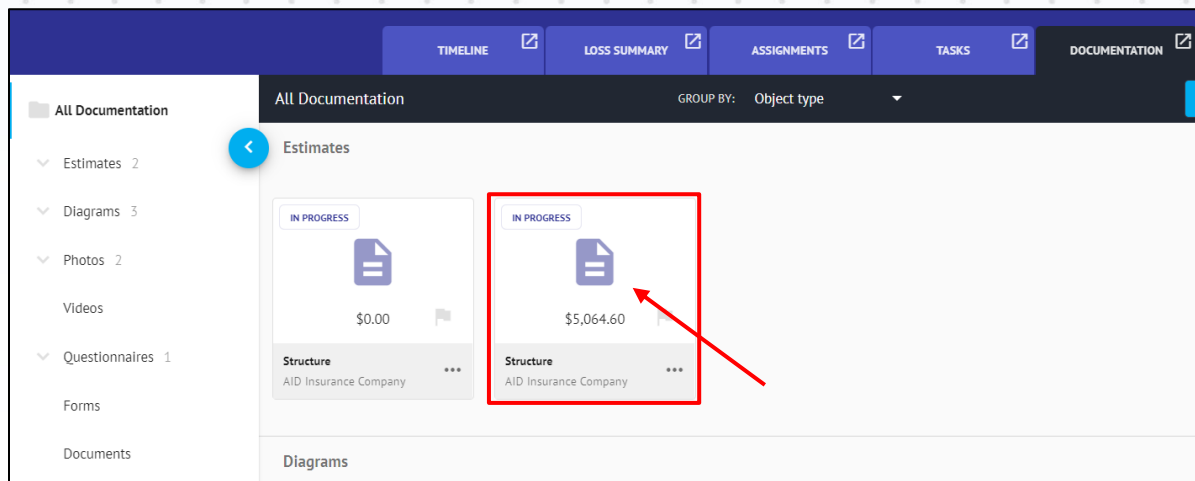
Within a claim in Claims Connect, click on the Documentation tab to view available estimates.
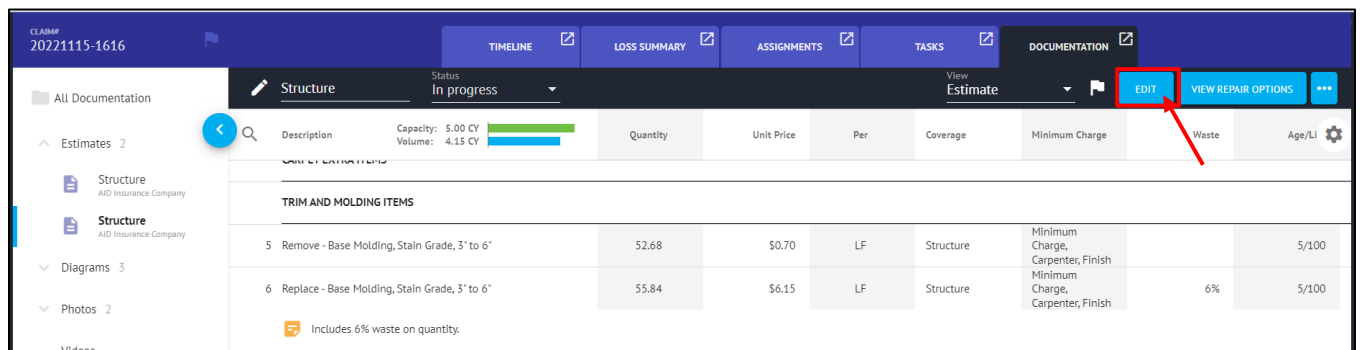
Step 2

Open the estimate you wish to review/edit by clicking on it from the Documentation page.
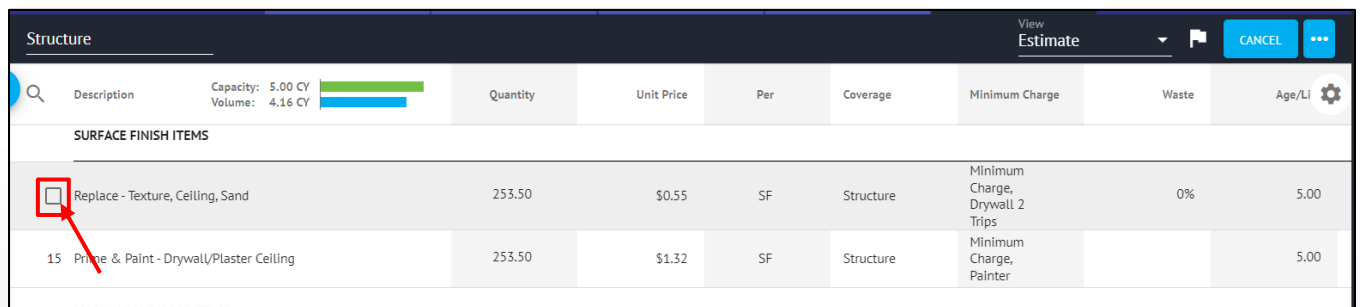

Step 3

Within the Estimate view, click on 'Edit' to enter edit mode.

Step 4

In Edit mode, select the line item that you wish to replace by clicking on the box next to the item description.
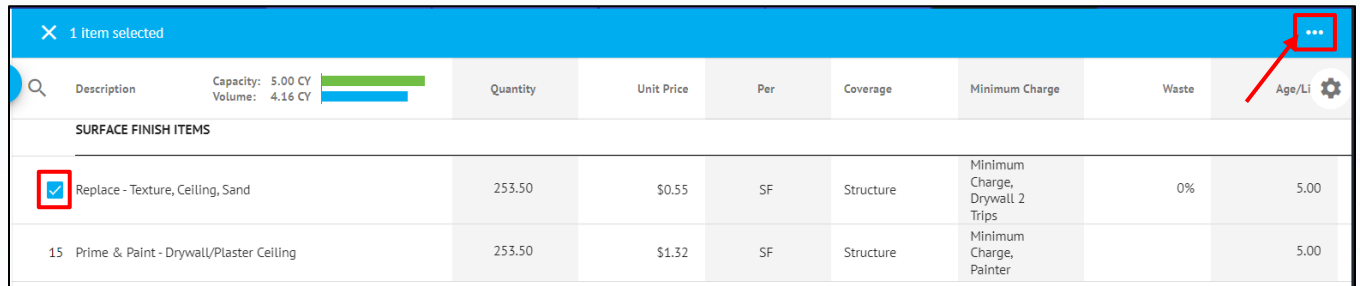
(Note: When the line is not highlighted, the box will disappear and the line item number will appear.)

Step 5

Once the line item that requires replacing has been selected, click on the ellipses button above the column headers.
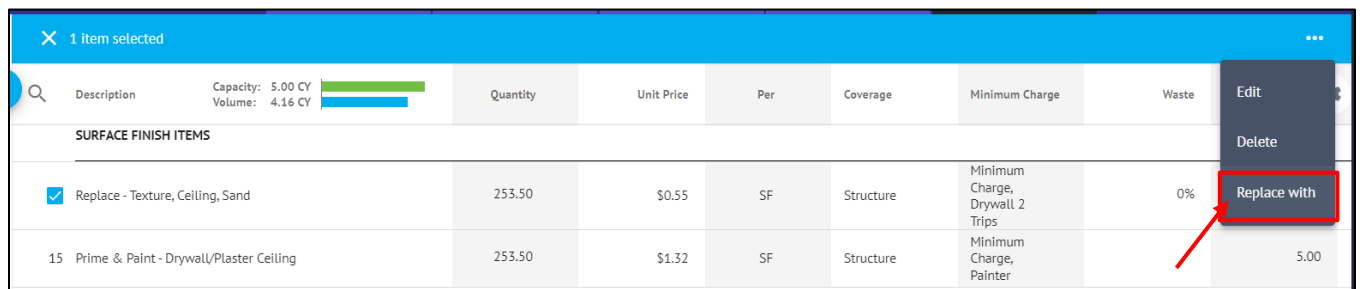
(Note: Only one line item may be selected at a time for the 'replace with' function.)

Step 6
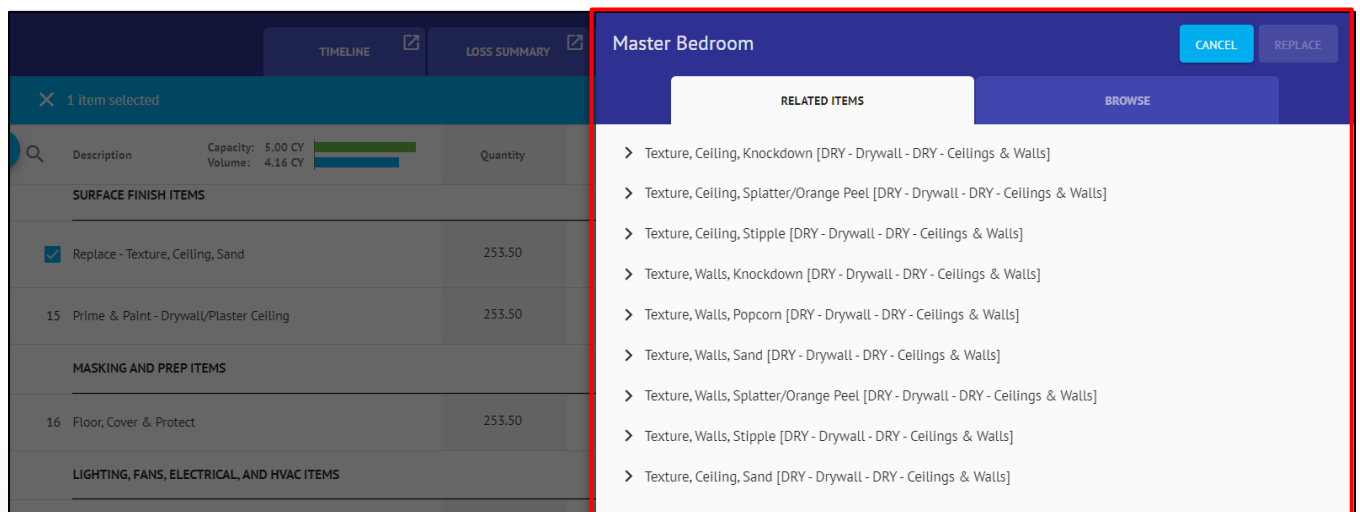
From the dropdown menu, click 'Replace with'.

Step 7

A blade will appear from the right with two tabs – Related Items and Browse.

Step 8
Related Items Tab

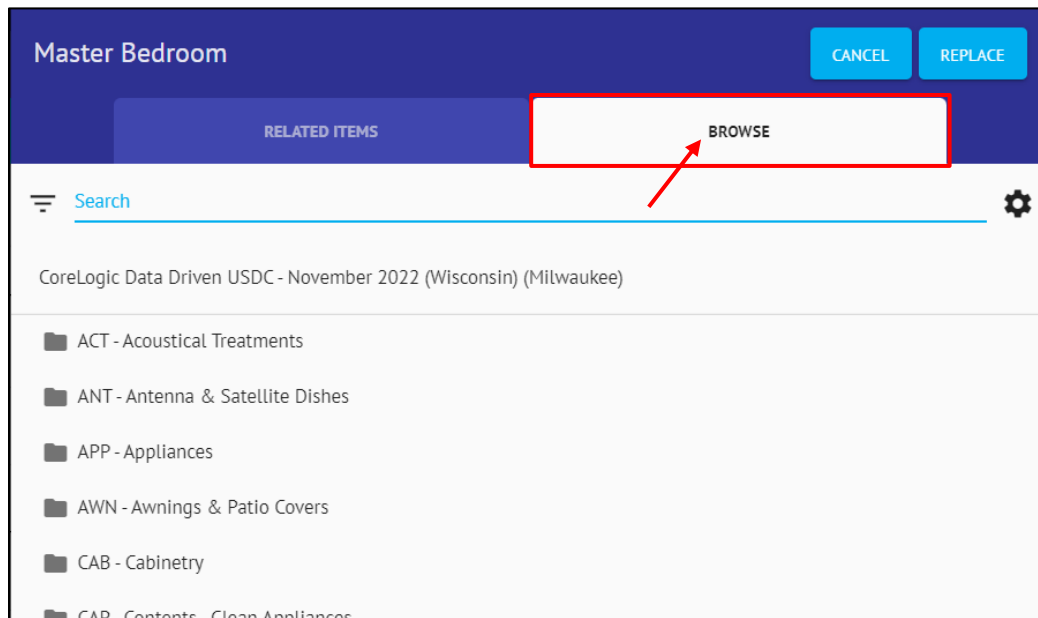If the line item that you require exists in the 'Related Items' tab, click on the item and then select the box next to the desired action.
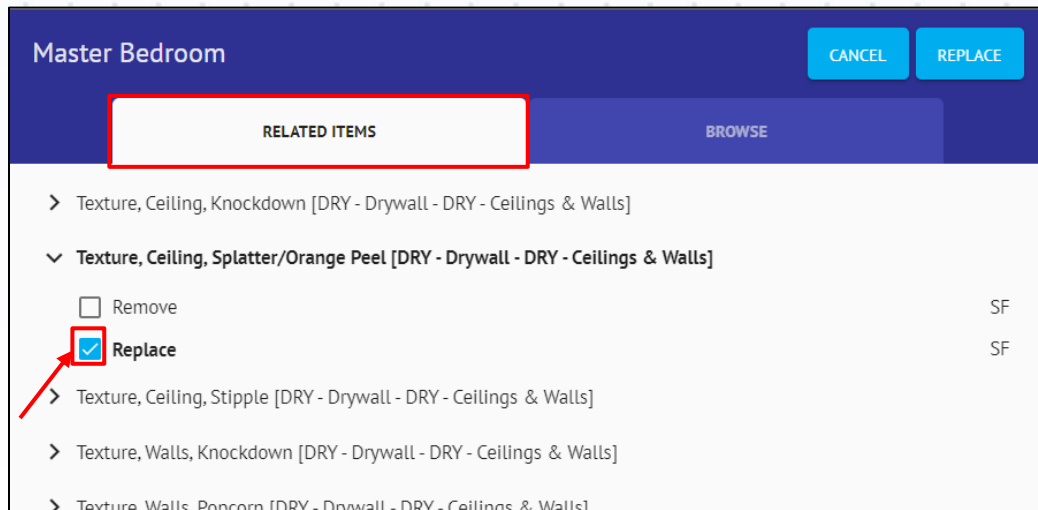
Browse

If the line item that you require does not exist in the 'Related Items' tab, click on 'Browse' to search the full database.

From the Browse tab, you may manually search through the database categories or utilize the Search bar at the top by typing in a key word or phrase. The optimized Line Item Search will return results for you to select from.
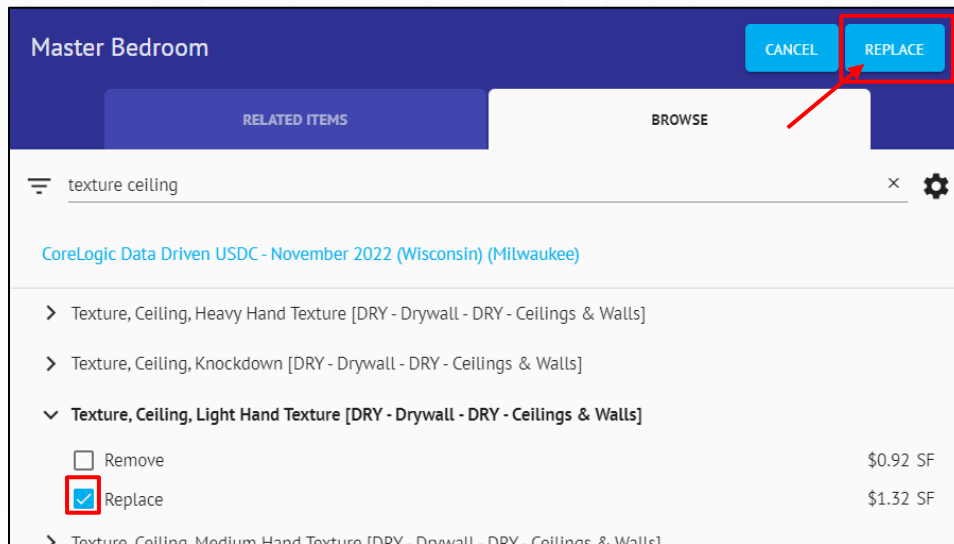

Once you have located the new line item, click on the item and then select the box next to the desired action.
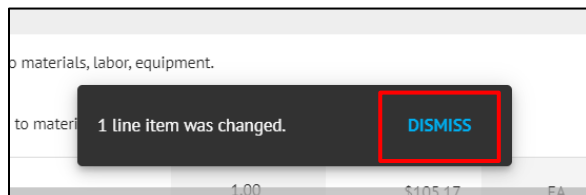
Step 9

Click 'Replace' to switch out the existing line item in the estimate with the new line item from the database.

Step 10

A dialog box indicating that the line item has been changed will appear at the bottom of the screen. Click dismiss to clear the box immediately or it will disappear on its own after a few seconds.

Step 11

The item will now be switched out in the estimate. Deselect the check box by clicking on it.

Step 12

If reviewing/editing of the estimate is not complete, but you want to view the changes to the estimate subtotals or total, you may click on 'Apply Changes/Recalculate' above the column headers at the top of the estimate. The estimate will remain in Edit mode.

Step 13

Once edits are complete, click 'Save' to save the changes and exit Edit mode.

(Note: Save will not present as an option if no changes have been made to the estimate.)

If you do not wish to save the changes you made, click 'Cancel'.