



# Job Aid

**Reply to Manual Timeline Entries –Claims Connect**

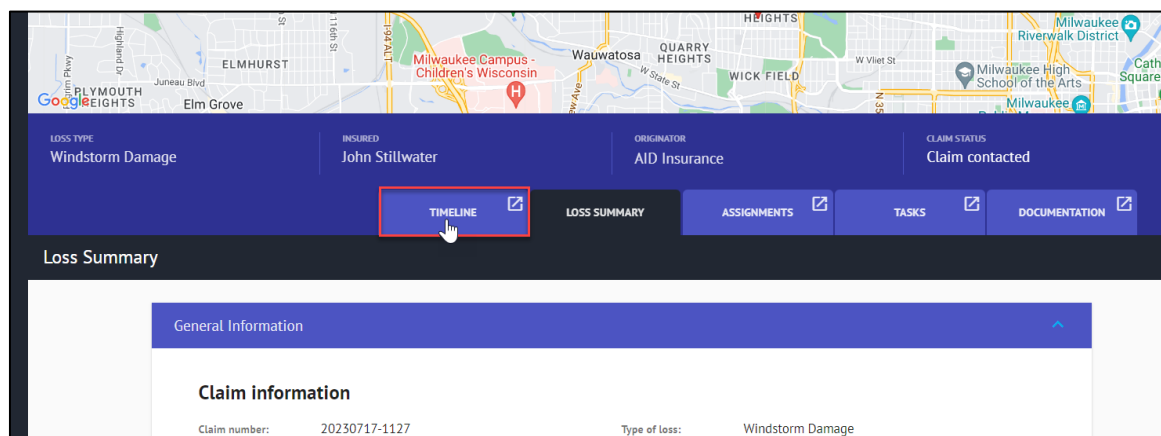
Issue 1  
August 9, 2023

# Reply to Manual Timeline Entries in Claims Connect

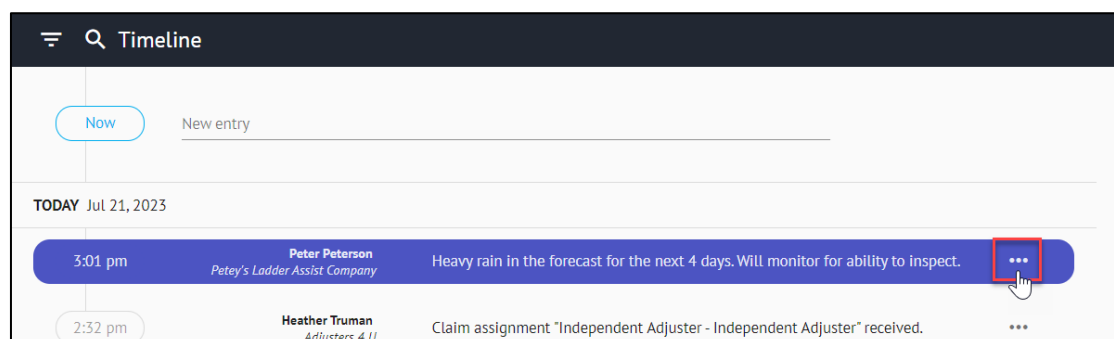
This job aid will guide a User through the steps to reply to manual timeline entries in Claims Connect.

**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 to the Timeline by clicking on the **Timeline tab**.



2. Choose Option A or B to initiate a **Reply** to a manual timeline entry:
  - a. Click the **Ellipsis menu** directly on the manual timeline entry and select **Reply** from the dropdown menu.



**TODAY Jul 21, 2023**

3:01 pm	<b>Peter Peterson</b> Petey's Ladder Assist Company	Heavy rain in the forecast for the next 4 days. Will monitor for ability to inspect.	...
2:32 pm	<b>Heather Truman</b> Adjusters 4 U	Claim assignment "Independent Adjuster - Independent Adjuster" received.	<b>Reply</b>
2:30 pm	<b>Peter Peterson</b> Petey's Ladder Assist Company	Claim assignment "Ladder Assist - Ladder Assist" received.	<b>View details</b>

- b. Click the manual timeline entry to open the entry's details blade and then click the new **Reply** button in the top right corner of the blade.

**Timeline**

**TODAY Jul 21, 2023**

3:01 pm	<b>Peter Peterson</b> Petey's Ladder Assist Company	Heavy rain in the forecast for the next 4 days. Will monitor for ability to inspect.	...
2:32 pm	<b>Heather Truman</b> Adjusters 4 U	Claim assignment "Independent Adjuster - Independent Adjuster" received.	...

**Timeline Entry** **REPLY**

**TODAY Jul 21, 2023 - 3:01 PM**

**AUTHOR**  
Peter Peterson Petey's Ladder Assist Company

**FROM**  
Ladder Assist - Ladder Assist Petey's Ladder Assist Company

**ENTRY**  
Heavy rain in the forecast for the next 4 days. Will monitor for ability to inspect.

**TO**

Originator AID Insurance
Independent Adjuster - Independent Adjuster Adjusters 4 U

**THIS ENTRY IS VISIBLE TO**

AID Insurance
Adjusters 4 U
Petey's Ladder Assist Company

3. A **New Timeline Entry** blade will open from the right with the **To** parties pre-filled based on the original manual timeline entry.

The screenshot shows the 'New Timeline Entry' form. The 'From' field is set to 'Originator (AID Insurance)'. The 'To' field is pre-filled with three parties: 'Originator (AID Insurance)', 'Ladder Assist - Ladder Assist (Petey's Ladder Assist C...', and 'Independent Adjuster - Independent Adjuster (Adjust...'. The 'Entry' field is empty. Below the 'Entry' field, there is a note: 'The entry cannot be edited later - please write with care and professionalism'. At the bottom, there is a checkbox labeled 'Make this entry visible to all current and future companies'.

4. Proceed to adjust and/or fill out the **Entry** sections, as with a normal Manual Timeline Entry.

The screenshot shows the 'New Timeline Entry' form. The 'From' field is set to 'Originator (AID Insurance)'. The 'To' field is pre-filled with three parties: 'Originator (AID Insurance)', 'Ladder Assist - Ladder Assist (Petey's Ladder Assist C...', and 'Independent Adjuster - Independent Adjuster (Adjust...'. The 'Entry' field is filled with the text: 'Thank you for the update. Please inspect as soon as safely possible.'. Below the 'Entry' field, there is a note: 'The entry cannot be edited later - please write with care and professionalism'. At the bottom, there is a checkbox labeled 'Make this entry visible to all current and future companies'.



5. Click **Add** to save the Reply Timeline Entry or **Cancel** to discard.



New Timeline Entry



CANCEL ADD

From  
Originator (AID Insurance)

To

Originator (AID Insuranc...  

Ladder Assist - Ladder Assist (Petey's Ladder Assist C...  

Independent Adjuster - Independent Adjuster (Adjust...  

Add assignments and users by typing

Entry

Thank you for the update. Please inspect as soon as safely possible.

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

All current companies working on the claim will see the entry.

☐ Make this entry visible to all current and future companies



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