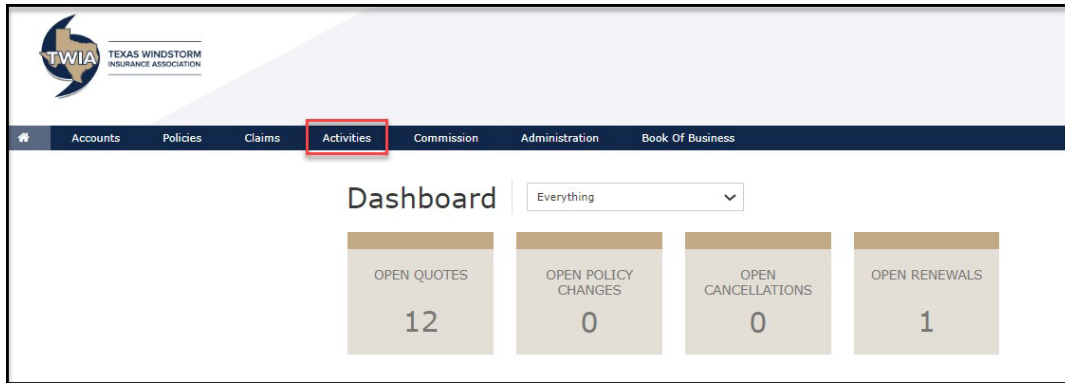


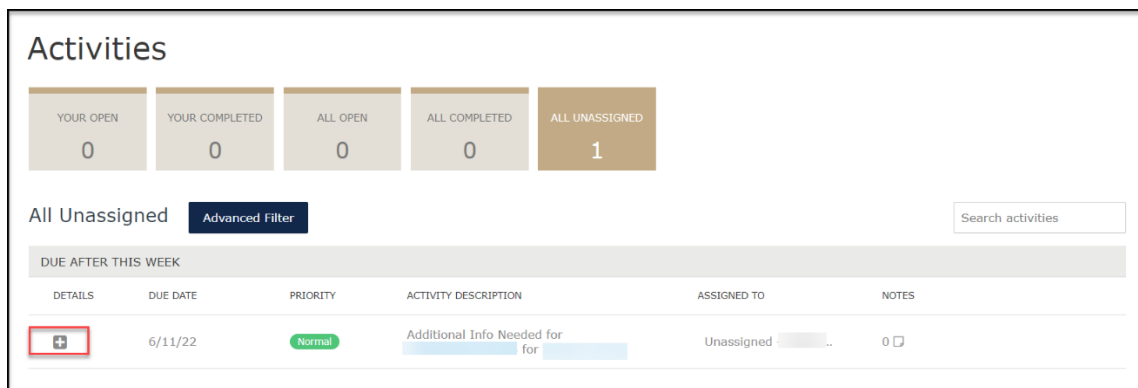
Completing Activities in the New Agent Portal

This job aid demonstrates the steps needed to work activities in the Agent Portal.

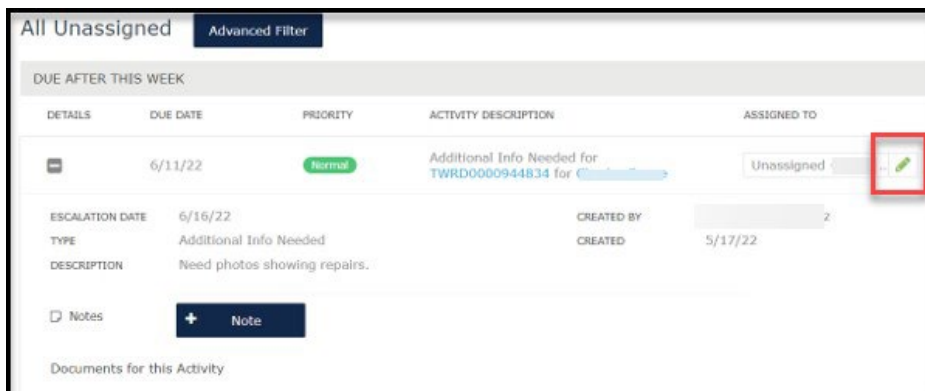
1. From the Agent Dashboard, select “Activities.”



2. In this case, the open activity shows under All Assigned and defaults on this screen. You may also see activities under Your Open. Select the “+” to see the activity details.



3. Next, hover your mouse over the word “unassigned” and then select the “the pencil icon.”



4. You can assign it to yourself by selecting “Me” from the drop-down menu.

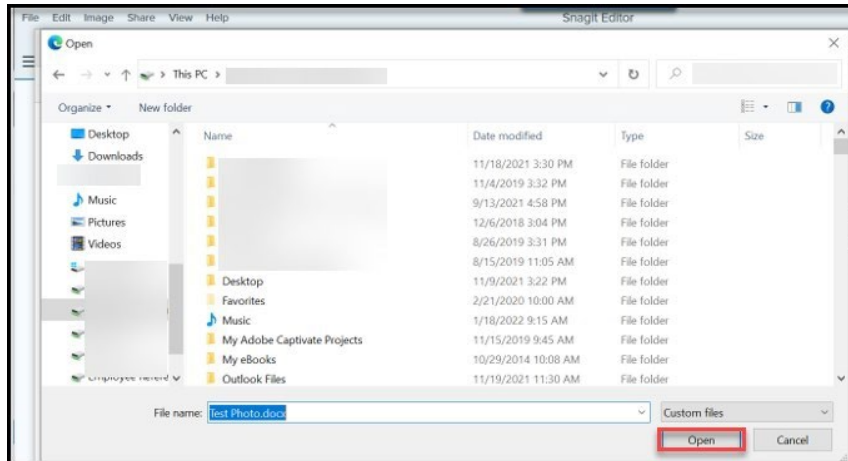
The screenshot shows the 'All Unassigned' page with an 'Advanced Filter' button. Below the filter is a table with columns: DETAILS, DUE DATE, PRIORITY, ACTIVITY DESCRIPTION, ASSIGNED TO, and NOTES. The first row shows an activity due on 6/11/22 with a 'Normal' priority. The description is 'Additional Info Needed for TWRD0000944834 for [redacted]'. The 'ASSIGNED TO' dropdown menu is open, and 'Me' is selected and highlighted with a red box. Below the table, there is a section for 'ESCALATION DATE' (6/16/22), 'TYPE' (Additional Info Needed), and 'DESCRIPTION' (Need photos showing repairs.). There is also a 'CREATED BY' field and a 'CREATED' date of 5/17/22. At the bottom, there is a 'Notes' section with a '+ Note' button and a 'Documents for this Activity' section.

5. Review the notes on the activity (see description). In this example, a repair photo is requested by underwriting. Please select photo from the drop-down menu as illustrated below.

This screenshot is similar to the previous one but includes annotations. A green arrow points to the description 'Need photos showing repairs.' in the 'DESCRIPTION' field. Below the 'Documents for this Activity' section, there is a dropdown menu with 'Photo' selected and highlighted with a red box. Next to it is a '+ Upload Documents' button. Below these elements, there is a red text box with instructions: 'Please select the Document Type and click the "+ Upload Documents" button to upload documents. After you upload a document, please update the description and click the Save button. Contact TWIA if you need to delete a document.' At the bottom, there is a disclaimer: 'Do not upload files containing illegal content or copyrighted information without the permission of the copyright owner. File names must not exceed 60 characters (including the file type extension). Files must not exceed 20MB.'

6. Next, select the photo you want to upload and then select “Open.”





7. Add in the description for the uploaded document and then click on the floppy disk symbol to save the document.

DUE AFTER THIS WEEK

DETAILS	DUE DATE	PRIORITY	ACTIVITY DESCRIPTION	ASSIGNED TO	NOTES
	6/11/22	Normal	Additional Info Needed for TWRD0000944834 for		0

ESCALATION DATE: 6/16/22
 TYPE: Additional Info Needed
 DESCRIPTION: Need photos showing repairs.

CREATED BY:
 CREATED: 5/17/22

☐ Notes

Documents for this Activity

Photo

Please select the Document Type and click the "+ Upload Documents" button to upload documents. After you upload a document, please update the description and click the Save button. Contact TWIA if you need to delete a document.

Do not upload files containing illegal content or copyrighted information without the permission of the copyright owner. File names must not exceed 60 characters (including the file type extension). Files must not exceed 20MB.

NAME	DESCRIPTION	DOCUMENT TYPE	DATE UPLOADED	SAVE
Test Photo.docx	Repairs Made 5-2022	Photo	05/17/2022	

8. To add an activity note, select "+ Note." Please be advised: a note entered here is not an internal agency note; it is actually a direct message to underwriting.



DUE AFTER THIS WEEK

DETAILS	DUE DATE	PRIORITY	ACTIVITY DESCRIPTION	ASSIGNED TO	NOTES
	6/11/22	Normal	Additional Info Needed for TWRD0000944834 for		0 Complete
ESCALATION DATE		6/16/22		CREATED BY	
TYPE		Additional Info Needed		CREATED 5/17/22	
DESCRIPTION		Need photos showing repairs.			
<div> Notes <div> Note</div> </div>					
Documents for this Activity					
<div>Photo</div>		<div> Upload Documents</div>		<div>Search documents</div>	
<p>Please select the Document Type and click the "+ Upload Documents" button to upload documents. After you upload a document, please update the description and click the Save button. Contact TWIA if you need to delete a document.</p> <p>Do not upload files containing illegal content or copyrighted information without the permission of the copyright owner. File names must not exceed 60 characters (including the file type extension). Files must not exceed 20MB.</p>					
NAME	DESCRIPTION	DOCUMENT TYPE	DATE UPLOADED	SAVE	
Test Photo.docx	Repairs Made 5-2022	Photo	05/17/2022		

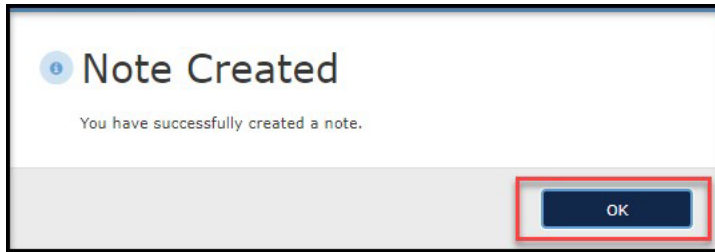
- Make sure to enter the requested information in the fields noted with a "*" and then select "Add."

DUE AFTER THIS WEEK

DETAILS	DUE DATE	PRIORITY	ACTIVITY DESCRIPTION	ASSIGNED TO	NOTES
	6/11/22	Normal	Additional Info Needed for TWRD0000944834 for		0 Complete
ESCALATION DATE		6/16/22		CREATED BY	
TYPE		Additional Info Needed		CREATED 5/17/22	
DESCRIPTION		Need photos showing repairs.			
<div> Notes <div> <div>Topic</div> <div>General</div> <div>Subject *</div> <div>Photo Uploaded</div> <div>Note *</div> <div>Repairs Completed 5-2022</div> </div> </div>					
				<div> <div>Cancel</div> <div>Add</div> </div>	

- You will get confirmation a note has been created. Next select, "OK."





11. When you are ready, select “Complete.”

DUE AFTER THIS WEEK

DETAILS	DUE DATE	PRIORITY	ACTIVITY DESCRIPTION	ASSIGNED TO	NOTES
	6/11/22	Normal	Additional Info Needed for TWRD0000944834 for		1

ESCALATION DATE: 6/16/22
 TYPE: Additional Info Needed
 DESCRIPTION: Need photos showing repairs.

CREATED BY:
 CREATED: 5/17/22

Notes: Nicole Critchfield 5/17/22 3:45PM **Photo Uploaded** Repairs Completed 5-2022

+ Note

Documents for this Activity

Photo **+ Upload Documents** Search documents

Please select the Document Type and click the "+ Upload Documents" button to upload documents. After you upload a document, please update the description and click the Save button. Contact TWIA if you need to delete a document.

Do not upload files containing illegal content or copyrighted information without the permission of the copyright owner. File names must not exceed 60 characters (including the file type extension). Files must not exceed 20MB.

NAME	DESCRIPTION	DOCUMENT TYPE	DATE UPLOADED	SAVE
Test Photo.docx	Repairs Made 5-2022	Photo	05/17/2022	

12. The activity now shows to be completed. In this case, the activity has been returned to TWIA Underwriting for an underwriter to review.

Activities

YOUR OPEN 0	YOUR COMPLETED 1	ALL OPEN 0	ALL COMPLETED 1	ALL UNASSIGNED 0
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All Unassigned **Advanced Filter**

DUE AFTER THIS WEEK

DETAILS	DUE DATE	PRIORITY	ACTIVITY DESCRIPTION	ASSIGNED TO	NOTES
	-	Normal	Additional Info Needed for TWRD0000944834 for		1 ✓ COMPLETED

