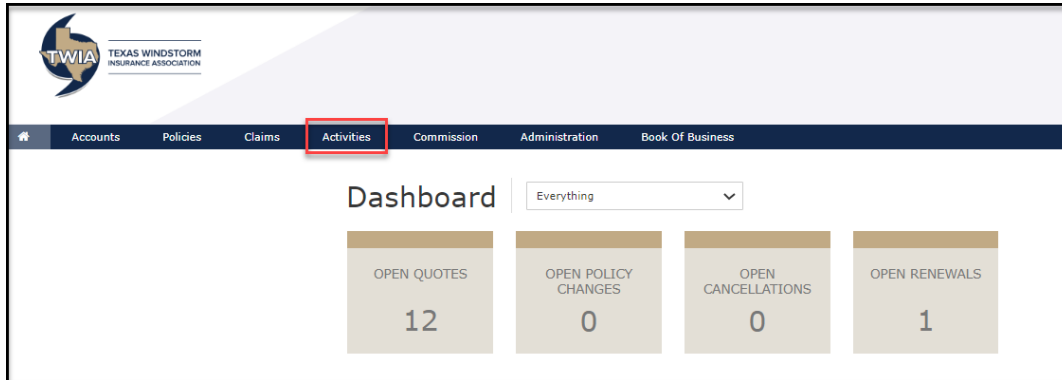


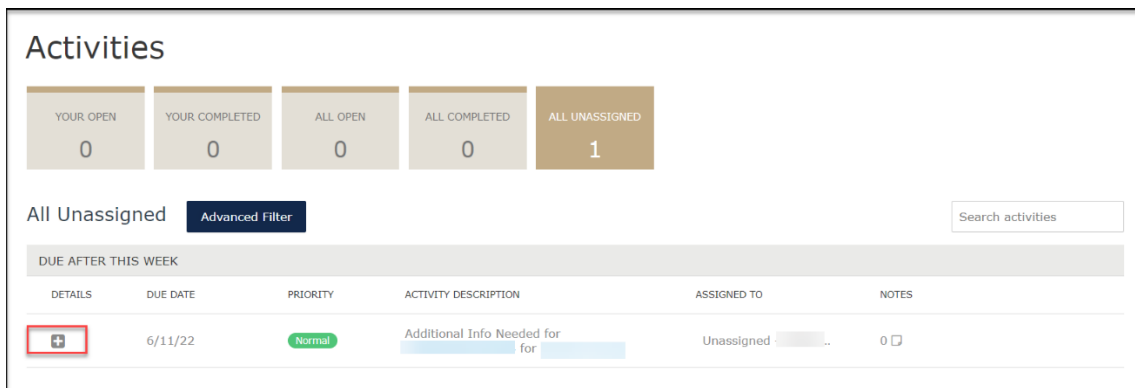
# Completing Activities in the New Agent Portal

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

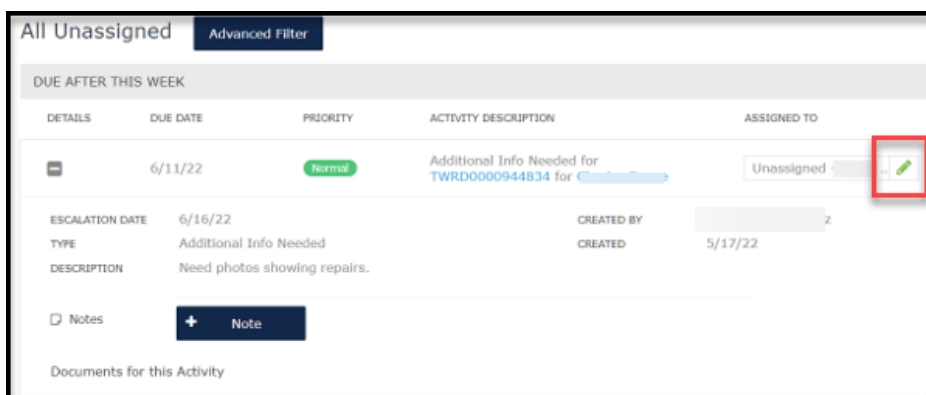
## 1. From the Agent Dashboard, select “Activities.”



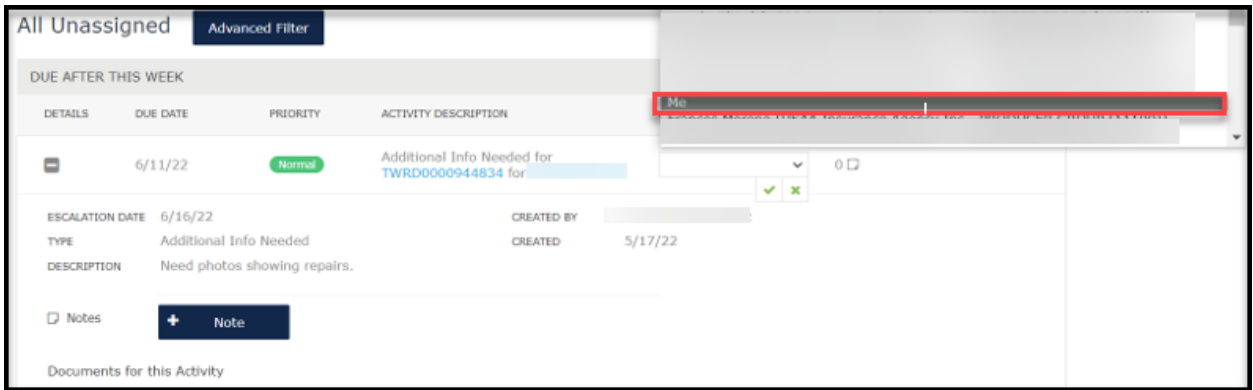
2. In this case, the open activity shows under All Assigned and defaults on this screen. You may also see activities under Your Open. Select the “+” to see the activity details.



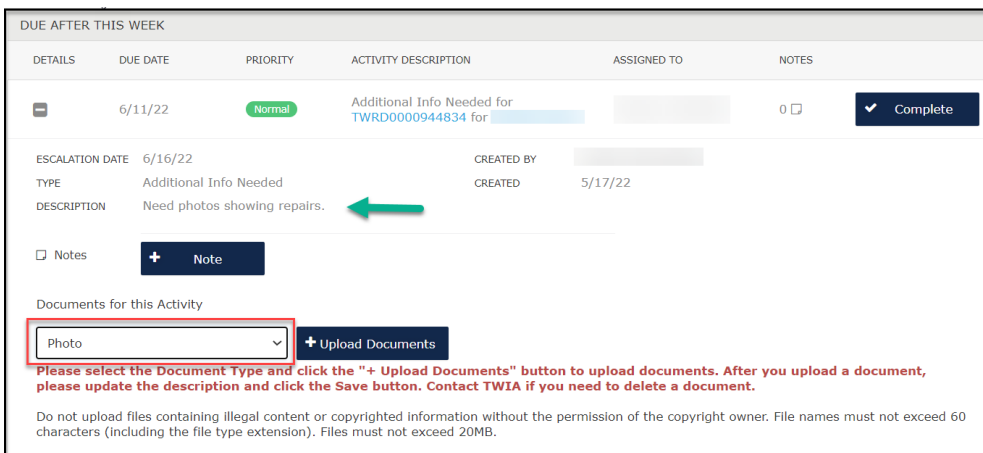
3. Next, select the “the pencil icon” to assign the activity.



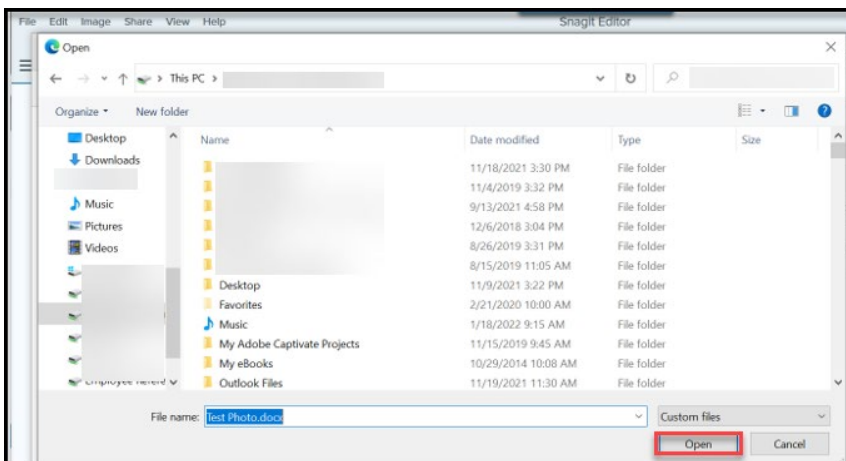
4. You can assign it to yourself by selecting “Me” from the drop-down menu.



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.



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 [redacted]	[redacted]	0

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

CREATED BY [redacted]  
CREATED 5/17/22

Notes Note

Documents for this Activity

Photo 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	

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 [redacted]	[redacted]	0

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

CREATED BY [redacted]  
CREATED 5/17/22

Notes Note

Documents for this Activity

Photo 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.

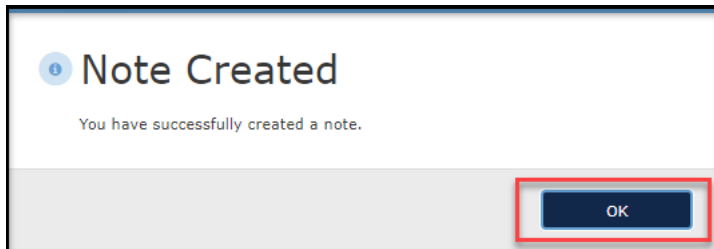
NAME	DESCRIPTION	DOCUMENT TYPE	DATE UPLOADED	SAVE
Test Photo.docx	Repairs Made 5-2022	Photo	05/17/2022	



9. Make sure to enter the requested information in the fields noted with a “\*” and then select “Add.”

The screenshot shows a task management interface. At the top, it says "DUE AFTER THIS WEEK". Below that is a table with columns: DETAILS, DUE DATE, PRIORITY, ACTIVITY DESCRIPTION, ASSIGNED TO, and NOTES. The first row shows a task due on 6/11/22 with a priority of "Normal". The activity description is "Additional Info Needed for TWRD0000944834 for [redacted]". The assigned to field is empty. The notes column shows "0" and a "Complete" button. Below the table, there are fields for ESCALATION DATE (6/16/22), TYPE (Additional Info Needed), and DESCRIPTION (Need photos showing repairs.). There are also fields for CREATED BY and CREATED (5/17/22). A "Notes" section is open, showing a "Topic" of "General", a "Subject" field with "Photo Uploaded", and a "Note" field with "Repairs Completed 5-2022". At the bottom of the notes section are "Cancel" and "Add" buttons. The "Add" button is highlighted with a red box.

10. You will get confirmation a note has been created. Next select, “OK.”



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

The screenshot shows the same task management interface as in step 9. The task is now marked as "Complete" with a checkmark icon in the notes column. The "Add" button from the previous step is no longer visible. Below the notes section, there is a "Documents for this Activity" section. It shows a "Photo" document type and an "Upload Documents" button. Below that, there is a table of documents. The table has columns: NAME, DESCRIPTION, DOCUMENT TYPE, DATE UPLOADED, and SAVE. The first row shows a document named "Test Photo.docx" with a description of "Repairs Made 5-2022", a document type of "Photo", and a date uploaded of "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	YOUR COMPLETED	ALL OPEN	ALL COMPLETED	ALL UNASSIGNED
0	1	0	1	0

All Unassigned [Advanced Filter](#)

DUE AFTER THIS WEEK

DETAILS	DUE DATE	PRIORITY	ACTIVITY DESCRIPTION	ASSIGNED TO	NOTES
	-	Normal	Additional Info Needed for <a href="#">TWRD000944834</a> for		1 <span style="border: 1px solid red; padding: 2px;">✓ COMPLETED</span>

