**Claim Movement Abilities Listed with basic flow**

**Global Admin**

View Open Claims

- Claim Movement Abilities

- Cancel Claim

- Shows Canceled in the claims status and details, gets placed into the primary archive

- Close Claim

- Shows Closed in the claims status and details, gets placed into the primary archive

- Delete Claim

- Shows Deleted in the claims status and details, gets placed into the Deleted claims archive

View Closed/Canceled Claims

- Claim Movement Abilities

- Cancel Claim

- Shows Canceled in the claims status and details, gets placed into the primary archive

- Close Claim

- Shows Closed in the claims status and details, gets placed into the primary archive

- Delete Claim

- Shows Deleted in the claims status and details, gets placed into the Deleted claims archive

View Deleted Claims

- Claim Movement Abilities

- Permanently Delete Claim

- Completely deleted all of the claim data in its entirety

**Super Global Admin (new user and is the same is global admin except this user has the functionality of marking/creating/editing any global admin and/or making them active or inactive)**

View Open Claims

- Claim Movement Abilities

- Cancel Claim

- Shows Canceled in the claims status and details, gets placed into the primary archive

- Close Claim

- Shows Closed in the claims status and details, gets placed into the primary archive

- Delete Claim

- Shows Deleted in the claims status and details, gets placed into the Deleted claims archive

View Closed/Canceled Claims

- Claim Movement Abilities

- Cancel Claim

- Shows Canceled in the claims status and details, gets placed into the primary archive

- Close Claim

- Shows Closed in the claims status and details, gets placed into the primary archive

- Delete Claim

- Shows Deleted in the claims status and details, gets placed into the Deleted claims archive

View Deleted Claims

- Claim Movement Abilities

- Permanently Delete Claim

- Completely deleted all of the claim data in its entirety

**APPRAISAL COMPANY LIST**

**Independent Appraisal Company Appraiser**

New Claim Inbox

* Claim Movement Abilities
  + Accept Claim
    - Claim gets moved to In Process

In Process

* Claim Movement Abilities
  + Mark Claim Completed
    - Claim gets moved to Pending Review/Completion

Pending Review/Completion

* Claim Movement Abilities
  + Move Back to In Process
    - Claim gets moved back to In Process

**Independent Appraisal Company Branch Admin**

New Claim Inbox

* Claim Movement Abilities
  + Accept Claim
    - Claim gets moved to In Process

Assigned to Dispatch

* Claim Movement Abilities
  + Dispatch Claim to IA
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned to IA
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Assigned to IA

* Claim Movement Abilities
  + Re-Assign (previously was Assign/Reassign)
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned to IA but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive
  + Mark Claim Completed
    - Claim gets moved to Pending Review/Completion

Pending Review/Completion

* Claim Movement Abilities
  + Re-Assign (previously was Assign/Reassign)
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned to IA but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

**Independent Appraisal Company Branch Employee**

New Claim Inbox

* Claim Movement Abilities
  + Accept Claim
    - Claim gets moved to Assigned to Dispatch

Assigned to Dispatch

* Claim Movement Abilities
  + Dispatch Claim to IA
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned to IA
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Assigned to IA

* Claim Movement Abilities
  + Re-Assign (previously was Assign/Reassign)
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned to IA but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive
  + Mark Claim Completed
    - Claim gets moved to Pending Review/Completion

Pending Review/Completion

* Claim Movement Abilities
  + Re-Assign (previously was Assign/Reassign)
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned to IA but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

**Independent Appraisal Company Desk Reviewer**

New Claim Inbox

* Claim Movement Abilities
  + Accept Claim
    - Claim gets moved to In Process

In Process

* Claim Movement Abilities
  + Mark Claim Reviewed
    - Claim gets moved to Pending Review/Completion

Pending Review/Completion

* Claim Movement Abilities
  + Move Back to In Process
    - Claim gets moved back to In Process

**Independent Appraisal Company Admin**

Assigned to Branch/Franchise

* Claim Movement Abilities
  + Re-Assign to Branch / Franchise (bypasses the zip code selection and allows the user to reassign the file to whichever branch that is needed)
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned to Branch/Franchise but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Overdue files (show claims over 48 hours old with no new status applied) (this is a new nav bar)

* Claim Movement Abilities
  + Re-Assign to Branch / Franchise (bypasses the zip code selection and allows the user to reassign the file to whichever branch that is needed)
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned to Branch/Franchise but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

**Independent Appraisal Company Call Center Branch Admin (new user)**

New Claim Inbox

* Claim Movement Abilities
  + Accept Claim
    - Claim gets moved to Assigned to Dispatch

Assigned to Dispatch

* Claim Movement Abilities
  + Dispatch Claim to IA
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned to IA
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Assigned to IA

* Claim Movement Abilities
  + Re-Assign (previously was Assign/Reassign)
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned to IA but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive
  + Mark Claim Completed
    - Claim gets moved to Pending Review/Completion

Pending Review/Completion

* Claim Movement Abilities
  + Re-Assign (previously was Assign/Reassign)
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned to IA but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive
  + Mark Claim Completed
    - Claim gets moved to Pending Review/Completion

**Appraisal Company Call Center Branch Employee (new user)**

New Claim Inbox

* Claim Movement Abilities
  + Accept Claim
    - Claim gets moved to Assigned to Dispatch

Assigned to Dispatch

* Claim Movement Abilities
  + Dispatch Claim to IA
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned to IA
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Assigned to IA

* Claim Movement Abilities
  + Re-Assign (previously was Assign/Reassign)
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned to IA but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive
  + Mark Claim Completed
    - Claim gets moved to Pending Review/Completion

Pending Review/Completion

* Claim Movement Abilities
  + Re-Assign (previously was Assign/Reassign)
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned to IA but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive
  + Mark Claim Completed
    - Claim gets moved to Pending Review/Completion

**INSURANCE COMPANY LIST**

**In-House Appraiser**

New Claim Inbox

* Claim Movement Abilities
  + Accept Claim
    - Claim gets moved to In Process

In Process

* Claim Movement Abilities
  + Mark Claim Completed
    - Claim gets moved to Pending Review/Completion

Pending Review/Completion

* Claim Movement Abilities
  + Move Back to In Process
    - Moves the claim back to In Process

**Insurance Company Adjuster (View only their own claims)**

Unassigned Claims

* Claim Movement Abilities
  + Assign / Reassign
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned Claims

Assigned Claims

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim back to Unassigned Claims and removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned Claims but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users; if the claim is Unassigned completely to all users then the claim gets moved back to Unassigned Claims
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Pending Appraiser Acceptance

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Marked Completed by Assignee

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

**Insurance Company Branch Adjuster Supervisor (View all claims for adjusters under them)**

Unassigned Claims

* Claim Movement Abilities
  + Assign / Reassign
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned Claims

Assigned Claims

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim back to Unassigned Claims and removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned Claims but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users; if the claim is Unassigned completely to all users then the claim gets moved back to Unassigned Claims
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Pending Appraiser Acceptance

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Marked Completed by Assignee

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

**Insurance Company Admin (View ALL Claims from All Branches under them)**

Unassigned Claims

* Claim Movement Abilities
  + Assign / Reassign
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned Claims

Assigned Claims

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim back to Unassigned Claims and removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned Claims but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users; if the claim is Unassigned completely to all users then the claim gets moved back to Unassigned Claims
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Pending Appraiser Acceptance

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Marked Completed by Assignee

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

**Insurance Company Branch Admin (View ALL Claims from users in their branch)**

Unassigned Claims

* Claim Movement Abilities
  + Assign / Reassign
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned Claims

Assigned Claims

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim back to Unassigned Claims and removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned Claims but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users; if the claim is Unassigned completely to all users then the claim gets moved back to Unassigned Claims
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Pending Appraiser Acceptance

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Marked Completed by Assignee

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

**Insurance Company Desk Reviewer**

New Claim Inbox

* Claim Movement Abilities
  + Accept Claim
    - Claim gets moved to In Process

In Process

* Claim Movement Abilities
  + Mark Claim Reviewed
    - Claim gets moved to Pending Review/Completion

Pending Review/Completion

* Claim Movement Abilities
  + Move Back to In Process
    - Claim gets moved to In Process

**Insurance Company Reinspector**

New Claim Inbox

* Claim Movement Abilities
  + Accept Claim
    - Claim gets moved to In Process

In Process

* Claim Movement Abilities
  + Mark Claim Reinspected
    - Claim gets moved to Pending Review/Completion

Reviewed / Pending Final Completion (previously was Pending Review/Completion)

* Claim Movement Abilities
  + Move Back to In Process
    - Claim gets moved to In Process

**Insurance Company Dispatcher**

Unassigned Claims

(the file will enter the user’s unassigned claims box even though it will show assigned on the adjusters user; ie: the adjuster has assigned the file to the dispatcher but the dispatcher has not assigned the file to any user)

* Claim Movement Abilities
  + Assign / Reassign
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned Claims

Assigned Claims

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim back to Unassigned Claims and removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned Claims but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users; if the claim is Unassigned completely to all users then the claim gets moved back to Unassigned Claims
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Pending Appraiser Acceptance

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

**THIRD PARTY ADMINSTRATOR LIST**

**Third Party Administrator Adjuster (View only their own claims) (new user and same as ins user of the same name except for claim assigning properties)**

Unassigned Claims

* Claim Movement Abilities
  + Assign / Reassign
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned Claims

Assigned Claims

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim back to Unassigned Claims and removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned Claims but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users; if the claim is Unassigned completely to all users then the claim gets moved back to Unassigned Claims
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Pending Appraiser Acceptance

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Marked Completed by Assignee

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

**Third Party Administrator Branch Adjuster Supervisor (View all claims for adjusters under them) (new user and same as ins user of the same name except for claim assigning properties)**

Unassigned Claims

* Claim Movement Abilities
  + Assign / Reassign
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned Claims

Assigned Claims

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim back to Unassigned Claims and removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned Claims but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users; if the claim is Unassigned completely to all users then the claim gets moved back to Unassigned Claims
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Pending Appraiser Acceptance

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Marked Completed by Assignee

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

**Third Party Administrator Admin (View ALL Claims from All Branches under them) (new user and same as ins user of the same name except for claim assigning properties)**

Unassigned Claims

* Claim Movement Abilities
  + Assign / Reassign
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned Claims

Assigned Claims

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim back to Unassigned Claims and removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned Claims but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users; if the claim is Unassigned completely to all users then the claim gets moved back to Unassigned Claims
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Pending Appraiser Acceptance

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Marked Completed by Assignee

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

**Third Party Administrator Branch Admin (View ALL Claims from users in their branch) (new user and same as ins user of the same name except for claim assigning properties)**

Unassigned Claims

* Claim Movement Abilities
  + Assign / Reassign
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned Claims

Assigned Claims

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim back to Unassigned Claims and removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned Claims but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users; if the claim is Unassigned completely to all users then the claim gets moved back to Unassigned Claims
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Pending Appraiser Acceptance

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Marked Completed by Assignee

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

**Third Party Administrator Dispatcher (new user and same as ins user of the same name except for claim assigning properties)**

Unassigned Claims

(the file will enter the user’s unassigned claims box even though it will show assigned on the adjusters user; ie: the adjuster has assigned the file to the dispatcher but the dispatcher has not assigned the file to any user)

* Claim Movement Abilities
  + Assign / Reassign
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned Claims

Assigned Claims

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim back to Unassigned Claims and removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned Claims but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users; if the claim is Unassigned completely to all users then the claim gets moved back to Unassigned Claims
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Pending Appraiser Acceptance

* Claim Movement Abilities
  + Move back to Unassigned
    - Moves the claim’s status back to Unassigned and removes the original assigned users completely due to them never accepting the assignment
  + Re-Assign Claim
    - Assigns the claim to the selected person from the secondary page and leaves the claim in the Assigned claim status but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

**BODY SHOP LIST (new users and are VERY similar to the appraisal company users)**

**Body Shop Estimator (appraiser; do not type “appraiser”; listed for coder informational purposes only)**

New Claim Inbox

* Claim Movement Abilities
  + Accept Claim
    - Claim gets moved to In Process

In Process

* Claim Movement Claim Movement Abilities
  + Mark Claim Completed
    - Claim gets moved to Pending Review/Completion

Pending Review/Completion

* Claim Movement Abilities
  + Move Back to In Process
    - Claim gets moved to In Process

**Body Shop Branch Admin**

New Claim Inbox

* Claim Movement Abilities
  + Accept Claim
    - Claim gets moved to Assigned to Dispatch

Assigned to Dispatch

* Claim Movement Abilities
  + Dispatch Claim to Estimator
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned to Estimator
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Assigned to Estimator

* Claim Movement Abilities
  + Re-Assign
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned to Estimator but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive
  + Mark Claim Completed
    - Claim gets moved to Pending Review/Completion

Pending Review/Completion

* Claim Movement Abilities
  + Re-Assign
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned to Estimator but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

**Body Shop Branch Employee**

New Claim Inbox

* Claim Movement Abilities
  + Accept Claim
    - Claim gets moved to Assigned to Dispatch

Assigned to Dispatch

* Claim Movement Abilities
  + Dispatch Claim to Estimator
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned to IA
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Assigned to IA

* Claim Movement Abilities
  + Re-Assign
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned to IA but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive
  + Mark Claim Completed
    - Claim gets moved to Pending Review/Completion

Pending Review/Completion

* Claim Movement Abilities
  + Re-Assign
    - Assigns the claim to the selected person from the secondary page and moves the claim to Assigned to Estimator but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

**Body Shop Company Admin**

Assigned to Branch/Franchise

* Claim Movement Abilities
  + Re-Assign to Branch / Franchise (bypasses the zip code selection and allows the user to reassign the file to whichever branch that is needed and Only allows to assign to branches listed in their company)
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned to Branch/Franchise but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users
  + Cancel Claim
    - Shows Canceled in the claims status and details, gets placed into the primary archive
  + Close Claim
    - Shows Closed in the claims status and details, gets placed into the primary archive

Overdue files (show claims over 48 hours old with no new status applied) (this is a new nav bar)

* Claim Movement Abilities
  + Re-Assign to Branch / Franchise (bypasses the zip code selection and allows the user to reassign the file to whichever branch that is needed and Only allows to assign to branches listed in their company)
    - Assigns the claim to the selected person from the secondary page and keeps the claim in Assigned to Branch/Franchise but removes the claim from the original assigned users and places the claim in the secondary archive type for those unassigned users