Mitchell Connect Workflow Guide - DGIG

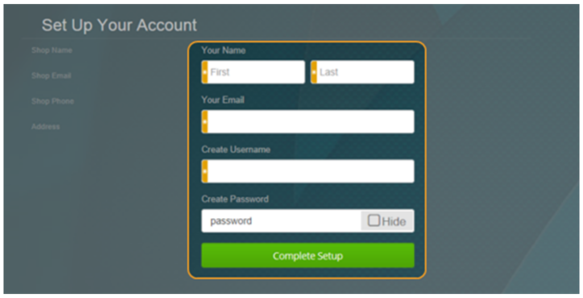
With UltraMate

Mitchell Connect for DGIG

Welcome to Mitchell Connect, a comprehensive solution for repair shops to receive assignments and send estimates to insurance companies. You can receive assignments from an insurance company, communicate through messaging, and send back estimates, photos, and other supportive documents.

1. Create an Account

The first time you use Mitchell Connect, you will need to set up your account before you can log on and start your assignment.



Click the link on the welcome email and follow the steps below:

Create an Account Instructions

1. On the Set Up Your Account page, in the **Your Name** fields, type your first and last name.
2. In the **Your Email** field, type your email address.
3. Pick a user name and type it in the **Create Username** field.

> **Note:** If the user name is already in use, a message appears asking you to select another user name.

4. Pick a password and type it in the **Create Password** field. Passwords are a minimum of 6 characters and a maximum of 10.
   - To hide your password as you type, select the **Hide** check box.
5. Click **Complete Set Up** to complete registration.

> **Note:** It may take a few moments for Mitchell Connect to complete your registration. Please wait a few moments before logging on to Mitchell Connect.

2. Open Assignment

After you register, you'll continue to receive email notifications for new assignments. You can open assignments from the email or the Open Jobs page.

> **Note**: Email notifications are sent to the email address listed in the shop's WorkCenter resource profile.

Open Assignments from Email

1. In the assignment email, review the assignment information.
2. Click **Open Assignment** to open the assignment in Mitchell Connect.

   > **Note:** If you are not signed in to Mitchell Connect, you will be prompted to do so.

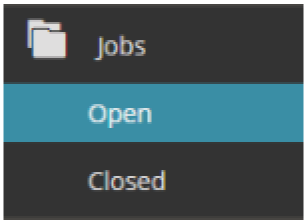
Open Assignments from Open Jobs Page

Use the Open Jobs page to navigate to assignments for your shop. From the Open Jobs page, you can access the Job Overview page where you can access details and functions to complete the assignments sent from the insurance company.

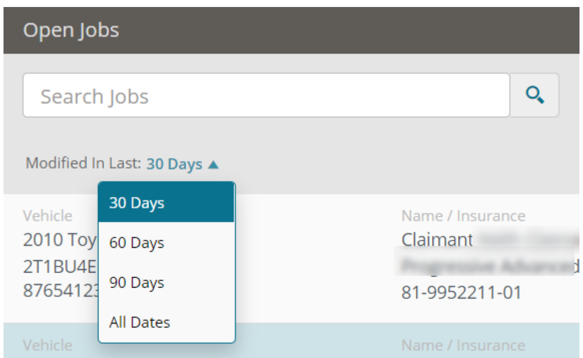
1. From the navigation pane in Mitchell Connect, click the **Jobs** tab.
2. On the **Open Jobs** page, click the job you want to open.

Search for Assignments

1. Select **Open** or **Closed** in the Jobs tab.



2. Set the **Modified in Last** filter to either 30 Days, 60 Days, 90 Days or All Dates to view jobs by time period.



3. To search for job by a specific term, type your search term in the search bar. You can search by claim number, vehicle year, make, model, VIN, insurance company, or last name.

4. Click .

5. You can view the job search results on the page. You can filter results by Last name, Insurance company name, Claim number, Estimated Completion, Modified Date, Received Date, Repair Status, Vehicle Make, or Vehicle Year.

6. If no results are returned, click **Cancel** to start a new search.

> **Tip:** You can also use the Jobs List Search to filter the Job List by specific criteria (e.g., Enter the year to only show vehicles for that year).

3. Set Repair Status

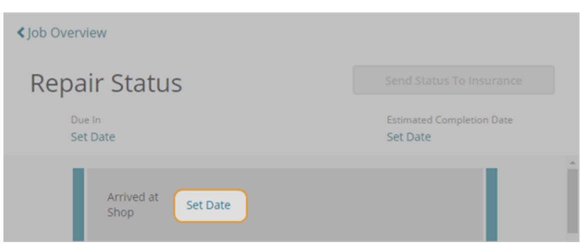
Use the Repair Status feature to communicate the status of Repair Assignments directly through Mitchell Connect. You can communicate the estimated completion date, update the status as you work on the Repair Assignment, and mark the Repair Assignment complete at the end of the process.

View Repair Status

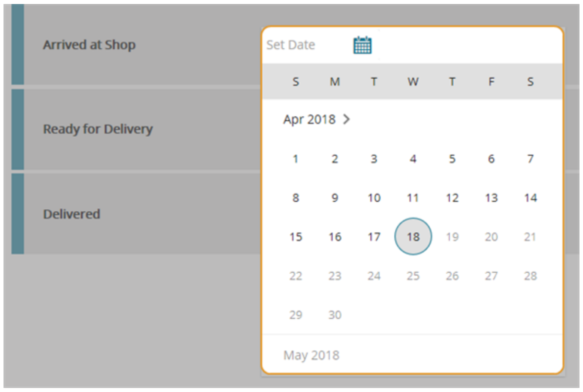
1. On the Job Overview page, click **Set Repair Status**. The **Repair Status** page appears.
2. Click the calendar next to the status you want to modify and select the date of the latest update.
3. If you are changing the Estimated Completion Date, select a reason for the change and click **Done**.
4. Click **Send to Insurance** to notify the insurance company of the change.

Update Status

1. Select a Job on the Open Jobs page.
2. On the Repair Status card, click **Set Repair Status**. The Repair Status page appears.
3. On the Repair Status page, click **Set Date** next to the desired repair status.



4. Click the calendar and select the date of the latest update.



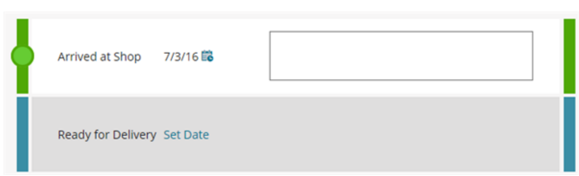
> **Note**: Only **Due In** date and **Estimated Completion Date** (ECD) can be set for the future. The **Set Date** field can be set for today or 365 days in the past.

5. Enter notes about the status update in the **Notes** field.
6. Click **Send Status**.

Edit Status Notes

1. On the Job Overview page, click **Set Repair Status**. The **Repair Status** page appears.
2. Click the calendar next to the status you want to modify and select the date of the latest update.
3. If you are changing the Estimated Completion Date, select a reason for the change and click **Done**.
4. Click **Send to Insurance** to notify the insurance company of the change.

3. On the Repair Status page, click next to the status you want to modify.
4. Type notes about the status update in the **Notes** field.



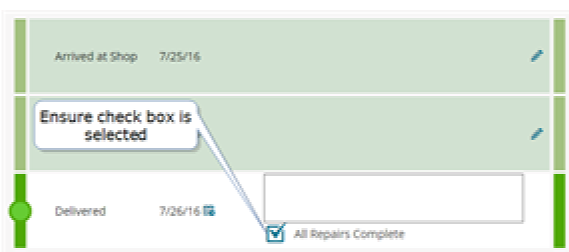
5. Click **Send Status** to notify the insurance company of the change.

Edit Status Date

1. On the Job Overview page, click **Set Repair Status**. The **Repair Status** page appears.
2. Click the calendar next to the status you want to modify and select the date of the latest update.
3. If you are changing the Estimated Completion Date, select a reason for the change and click **Done**.
4. Click **Send to Insurance** to notify the insurance company of the change.

Mark Repairs Delivered

1. On the Job Overview page, click **Set Repair Status**. The **Repair Status** page appears.
2. Click the calendar next to the status you want to modify and select the date of the latest update.
3. If you are changing the Estimated Completion Date, select a reason for the change and click **Done**.
4. Click **Send to Insurance** to notify the insurance company of the change.
2. On the Repair Status page, click **Set Date** next to the Delivered repair status.
3. Click the calendar and select the delivered date.
4. The **All Repairs Complete** check box is selected by default. Make sure this check box is selected before sending the status to the insurance company.



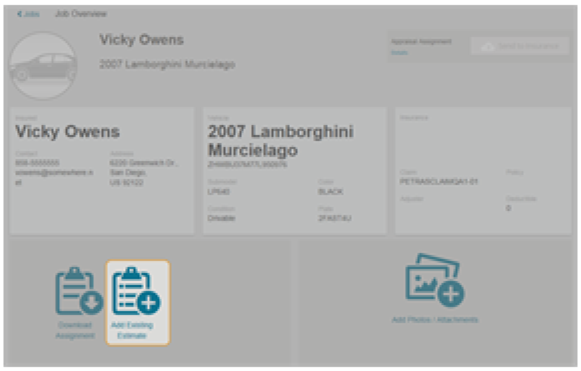
5. Click **Send Status**.

4. Add the Estimate to Mitchell Connect

When you complete and commit (lock) an estimate in your estimating system, add the estimate to the job in Mitchell Connect.When you complete and commit (lock) an estimate in your estimating system, add the estimate to the job in Mitchell Connect.

Add the Estimate to Mitchell Connect

1. On the Job Overview page for the assignment, click **Add Existing Estimate**.



2. The Add Estimates page shows all estimates written in the last two weeks. If you estimate doesn't show, try the following:
   - Change the date filter to the last 90 days or last 120 days.
   - Click View & Edit Locations and add the paths to where your estimating system exports estimates.

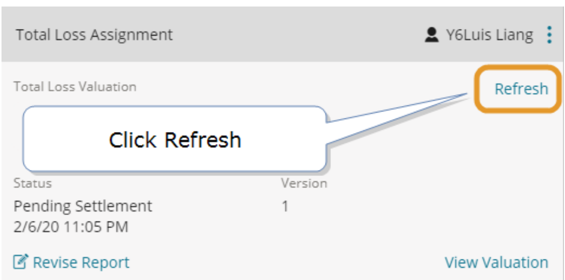
> **Tip:** Mitchell Connect places the most likely estimate at the top of the list.

3. Click **Select Estimate**. A PDF estimate automatically appears if you are using UltraMate.
4. When the estimate is successfully loaded to the Job, the estimate value displays on the Job Overview page. Attach photos and other documents as needed.

Submit for Total Loss

1. On the Job Overview page, click **Write Valuation Request**.

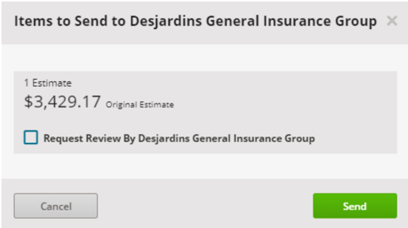
2. WorkCenter Total Loss appears in a new window in your browser. Complete the request in the window.
3. Once completed, click **Submit for Review**.
4. Once the request is submitted, Mitchell Connect will show the total loss assignment card as blank. Click **Refresh** (or press F5 on your keyboard) until the total loss card populates.



5. The total loss card is now populated. To view the valuation, click **Continue Request**.

> **Note**: After this step, the total loss worksheet is sent to Desjardins.

6. Click **Request Review by Desjardins General Insurance Group** if you want the claim to be sent to the review desk, and then click **Send**.



Note: Only select the check box **Request Review by Desjardins General Insurance Group** if you need this claim to be sent to the review desk.

5. Add Photos and Attachments

Use the attachments tab on the **Job Overview** page in Mitchell Connect to add photos, vendor invoices, towing bills, videos, and other artifacts to an assignment. Once you've added a file as an attachment, you can add a description.

Note: File limit size for documents and images is 10 MB

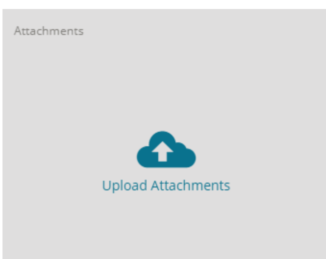
Add attachments

If you need to send photos or other documents to the insurance company, do the following:

Tip: For best results, download photos from your camera to your hard drive prior to adding them to Mitchell Connect.

Note: The attachments limit for a single upload is 200. A warning message appears if you attempt to upload more than 200 attachments at once.

1. On the **Job Overview** page, click **Upload Attachments**.



2. On the **Attachments** page, click **Upload**.
3. Browse to the files you want to attach.
4. Select all of the files you want to attach and click **Open**. Your images load in the **Uploading Attachments** window.

Tip: You can select multiple files by holding down **Ctrl** on your keyboard while selecting attachments.

5. If you are uploading multiple images, Mitchell Connect shows a progress bar for each image as it uploads. Click to the left of **Show Completed** toggle button if you only want to show images that failed to load. Click the **Retry** icon next to the failed upload if you want to try to upload a failed file again.

   Note: If an attachment fails to upload, Mitchell Connect will automatically retry the upload three times per attachment. On the third failed attempt, the Mitchell Connect Upload window clearly identifies any attachments that failed to upload. At the prompt, click **Retry All** to attempt to upload all attachments again or click **Exit Anyway** to close the window without loading those attachments.

6. If all files are successfully uploaded, the **Uploading Attachment** window closes for you. A total attachments count appears at the top left of the **Attachments** page.
7. To add more attachments, click **Upload** to reopen the **Open** dialog box.
8. To add a description to an attachment, click **Add a Description** on the image and then type a description in the text box.
9. When you're finished, click **Job Overview** to return to the **Job Overview** page.

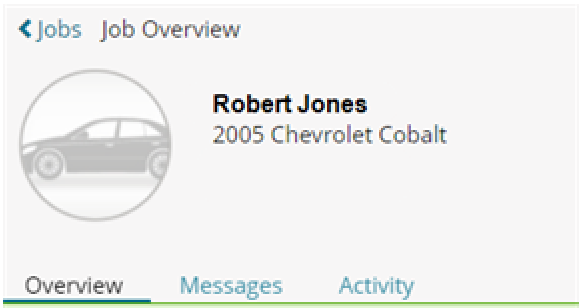
   Note: Attachments that have already been sent to the insurance company cannot be deleted and descriptions cannot be edited.

6. Send Messages to the Insurance Company

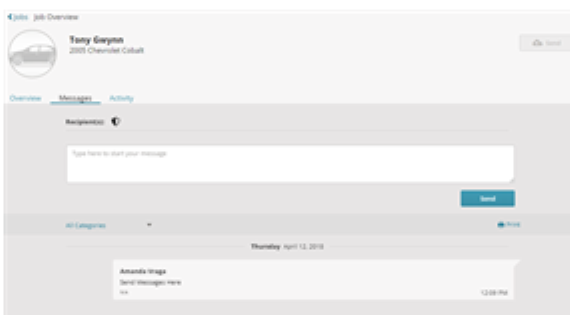
Use the messaging feature to send important messages to the insurance company directly from Mitchell Connect.

View Messages

1. On the Job Overview page, click the **Messages** tab. If no number displays, there are no messages.

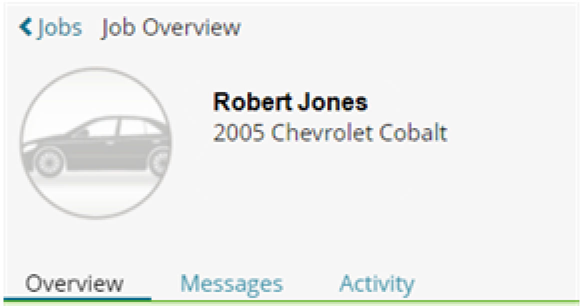


2. Messages display in the order they were sent. Scroll down to see additional messages, or click **Overview** to return to the Job Overview page.



Send Message to Insurance

1. On the Job Overview page, click the **Messages** tab.



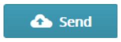
2. Enter your message, and then click **Send**.

> **Tip**: If your workflow includes journal entries, you can also select a journal category for the message. Select the category in the **Category** list. If you only have one category configured, then that category is automatically applied to the message and the category list does not appear.

3. Click **Overview** to return to the Job Overview page.

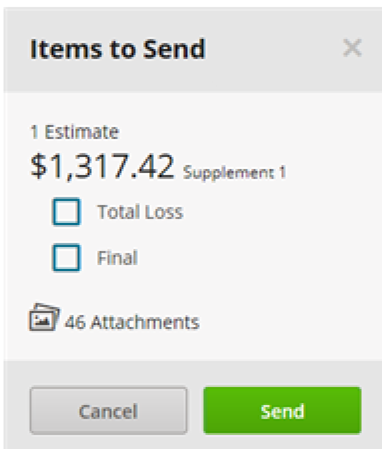
7. Send Estimate to Insurance Company

Send your work directly to an insurance company or partner. You can include an estimate only, attachments and an estimate, or just attachments if you have already sent an estimate up in a previous upload.



Send artifacts and final estimate to Insurance

1. On the **Job Overview** page for the assignment, click **Send**.
2. In the **Items to Send** window, clear both check boxes:
   - **Total Loss**
   - **Final**



3. Click **Send**.

8. Locked Estimates and Supplements

After you send an estimate, the insurance company can review the estimate and set a status. A lock symbol appears in the right corner of the **Estimate** card. The lock indicates the ownership of the estimate is held with the insurance company. Supplements cannot be created when the lock is present.

When the ownership lock is released, the lock symbol is no longer visible, and you can add a supplement.

The estimate is unlocked when the insurance company changes the status to Approved, Manual Closed, Supplement Assignment Sent, or Annotated.

Estimate Card Status Description

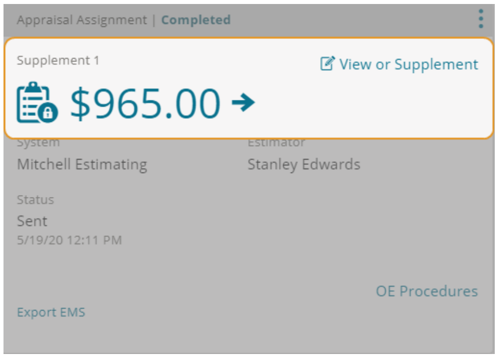
Note: Not All Statuses described below are used in all workflows.

Status of the estimate:

- **Sent**: Sent to the insurance company.
- **Not Sent**: Estimate hasn't been shared with the insurance company by the shop.
- **Pending Review**: Sent to insurance but locked pending review by the insurance company. A lock may appear on the Estimate card on the Job Overview page. Contact the insurance company to remove the lock. You can also send a message to the insurance company from the Messages tab to request to have an estimate unlocked.
- **Approved**: The Estimate has been approved by the insurance company.
- **Rejected**: Estimate rejected. Contact the insurance company to determine if another estimate is required.
- **Recommend Total Loss**: The insurance company recommends total loss rather than an estimate.
- **Supplement Requested**: The insurance company is requesting a Supplement to the estimate.
- **Supplemented**: The estimate includes a supplement.
- **Marked Closed**: Claim closed by the insurance company. No need to take additional action.

Add a Supplement

1. Open a job with an existing estimate.
2. On the **Estimate** card, click **View or Supplement**.



3. Complete and set your Supplement to **Committed** in your estimating system.
4. In Mitchell Connect, click **Add Completed Estimate**.
5. Mitchell Connect automatically opens the corresponding PDF. Click **Add Estimate**.
6. If you are ready to send to the insurance company, click **Send**.

Discard Changes if Needed

You can delete changes you made to the estimate before you send your changes to the insurance company. The estimate reverts back to the previous estimate. Your changes are removed from Mitchell Connect and your estimating system.

1. On the **Estimate** card with a completed Supplement, click **Discard Changes**.

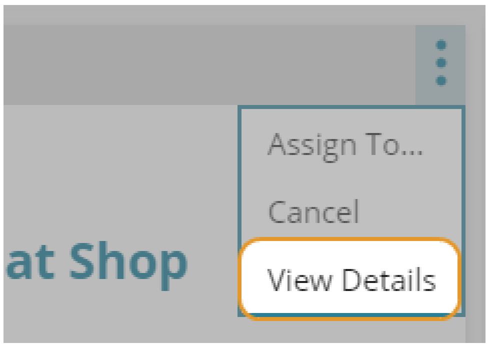
> **Note**: You can only discard changes if you haven't uploaded your updated estimate or Supplement to Mitchell Connect.

2. Click **Continue**, at the prompt. Any changes you made to your estimate are removed from your estimating system.
3. Click **Done** at the prompt.

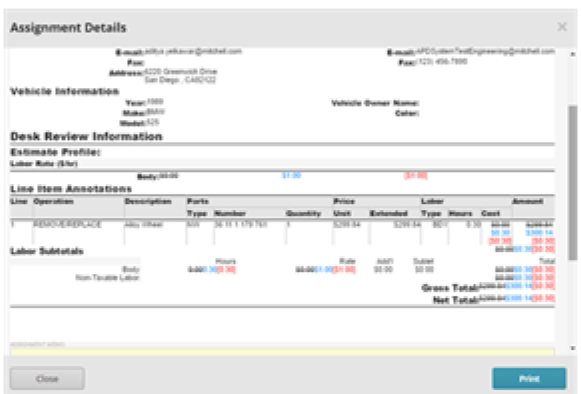
View Annotations

The insurance company may use annotations to make note of corrections or other changes. View those changes on the Assignment Details window. Changes are shown in red.

1. From the **Job Overview** page, click the menu icon on the **Estimate** or **Repair Assignment** card.
2. Select **View Details**. The **Assignment Details** window opens.



3. View the annotations in the Assignment Details window.



4. Click **Print** to print the changes or **Close** to close the window.

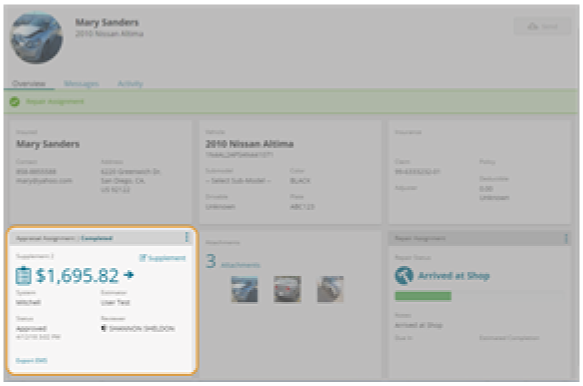
9. Manage your Estimates and Supplements

Use the **Estimate** page to view a time line of previous versions of your estimate. You can also view and print details on your estimates, add supplements, and view a delta report that shows changes made to your estimate.

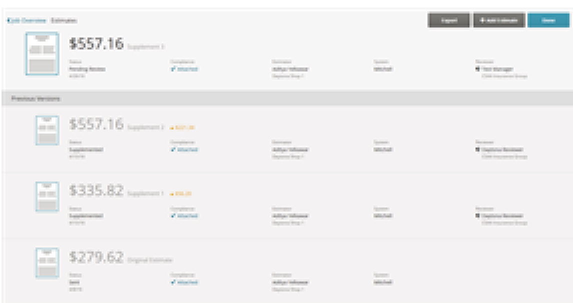
Open Estimate Manager

1. Open a job on the **Open Jobs** page.
2. On the **Job Overview** page, click on a blank section on the **Estimate** card.

   Note: To open the estimate manager, do not click on the estimate amount, PDF, Export EMS, or other highlighted links.

3. On the **Estimate Manager** page, scroll down as needed to view previous versions of your estimate. Your original estimate appears on the bottom of the time line.

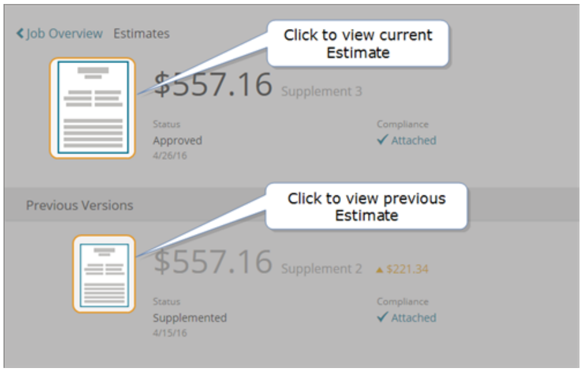
4. Click **Done** or click **Job Overview** to return to the **Job Overview** page.

Tip: You can access the **Estimate** page after you add a supplement by clicking **View Estimates** on the **Job Overview** page.

View Estimate Details

View details about the estimate and any previous versions.

1. On the **Estimate Manager** page, click the **Estimate** icon  next to the current or previous estimate.

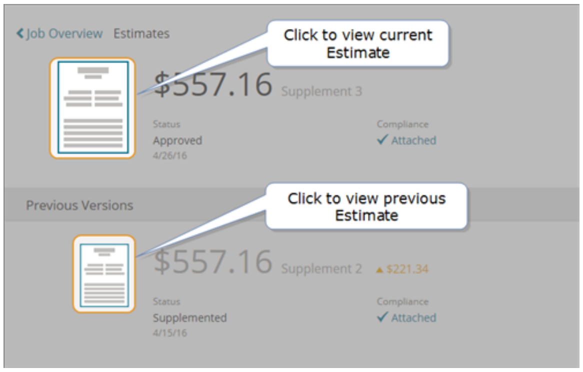


2. Scroll down to view details, and then click **Done** or click **Estimates** to return to the **Estimate Manager** page.

Print or Save Estimate Details

Print or save the current estimate, previous estimates, or staff written appraisals.

1. On the **Estimate Manager** page, click the **Estimate** icon next to the current or previous estimate.



2. On the **Estimate Details** page, click **Print**. The report appears as a PDF.

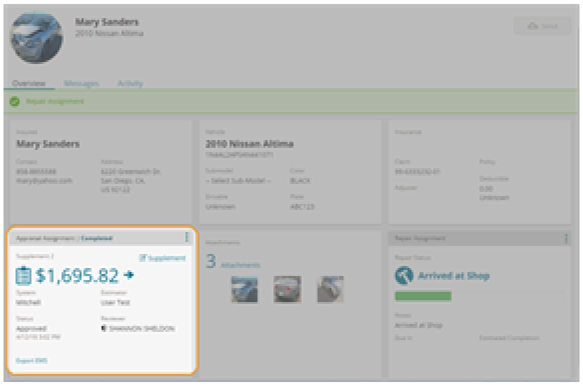
3. On your PDF reader, click **File**, and then click **Print** to print or click **Save As** to save.

Note: PDF options for printing and saving may vary.

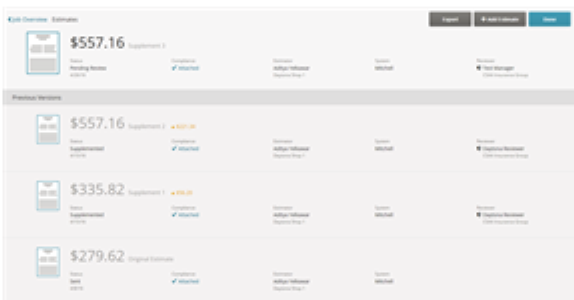
Generate Delta Report for Estimates

Use the Delta Report on the Estimate page to view changes made to your estimates and supplements. Use this feature to help track changes in your estimates and supplements.

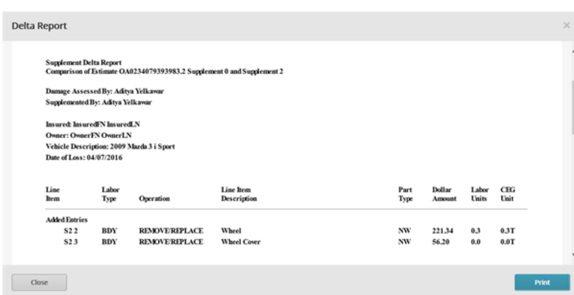
1. On the **Job Overview** page, click the **Estimate** card.



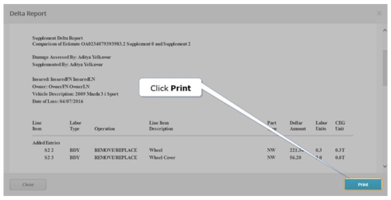
2. On the **Estimate Manager** page, scroll down as needed to view previous versions of your estimate. Your original estimate appears on the bottom of the time line.



3. Select the desired estimate or supplement in the **View Changes** list at the bottom of the page. The Delta Report appears.
4. On the Delta Report, scroll down to view details.



5. On the Delta Report, click **Print** to save or print a copy of the estimate. You can also click **Close** if you do not want to print or save the report.

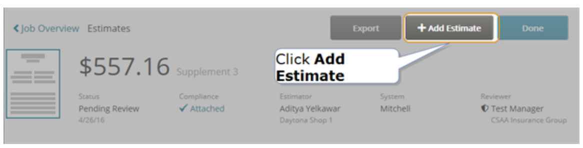


6. On your PDF reader, click **File**, and then click **Print** to print or click **Save As** to save.

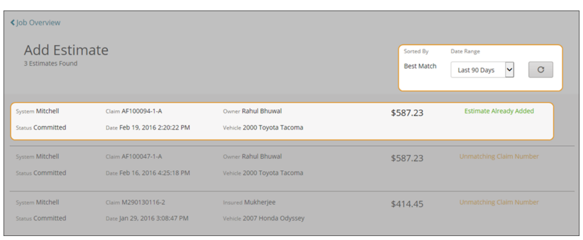
> **Note**: PDF options for printing and saving may vary.

Add a Supplement from the Estimate Page

1. If you have multiple estimates on the job, click the estimate total on the **Estimate** card from the **Job Overview** page. The **Estimate** page appears showing a list of estimates.
2. On the **Estimate** page, click **Add Estimate**. The existing estimate is loaded back to your estimating system for editing.



3. Complete and commit your supplement in your estimating system.
4. Mitchell Connect shows your most recent estimates. Use the **Date Range** list to search for older estimates if needed.



5. Select the desired estimate.
6. Submit your update and supportive documents when complete.

10. Close the Job

Use the **Closed** Job ta to remove completed Jobs from the **Open Jobs** page. This helps to manage the number of jobs on the **Open Jobs** page by showing only open jobs. If you need to reopen a job, you can search for the job and reopen it.

Note: You cannot delete jobs or assignments. You can close the job to remove it from your list of open jobs.

Tip: Close the job only when you have completed the full process and want to remove it from the **Jobs List** on the **Job Overview** page.

Close a Job

1. On the **Job Overview** page, click the **Open** list at the top of the page.
2. Click **Closed**. The job is closed and removed from the Open Jobs page.

Reopen a Job

Reopen a job if you want the job to show on the **Open Jobs** page.

1. Search for the job and open it.
2. On the **Job Overview** page, click the **Closed** list at the top of the page.
3. Click **Open**. The job is reopened and shows on the **Open Jobs** page.

Note: Reopening a job does not reopen the job with the insurance company. Reopening the job makes the job visible from the **Open Jobs** page.

Filter the My Jobs page to Open or Closed Jobs

1. On the **Jobs** page, click **Jobs** on the **Navigation** pane.
2. Click one of the following to sort:
   - **Open**: Show open jobs only.
   - **Closed**: Show closed jobs only.