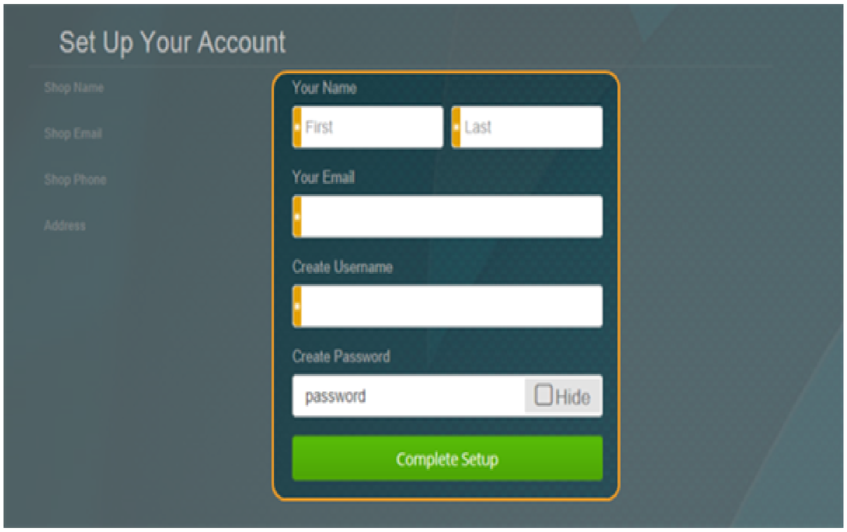
Mitchell Connect Workflow Guide - Hartford

Mitchell Connect for Hartford

Welcome to Mitchell Connect, a comprehensive solution for repair shops to receive assignments and send estimates to Hartford. 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 WorkCenter resource profile.

Open Assignments from Email

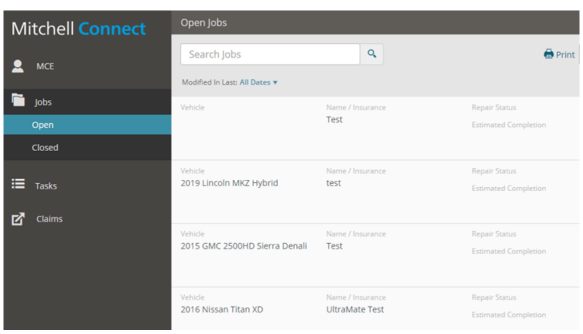
1. In the assignment email, review the assignment information.
2. Click **Open Assignment** to open the assignment in Mitchell Connect.

   > **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.

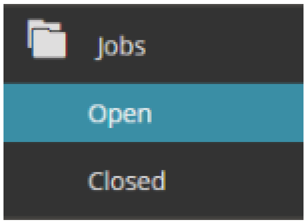
1. From the navigation pane in Mitchell Connect, click the **Jobs** tab.

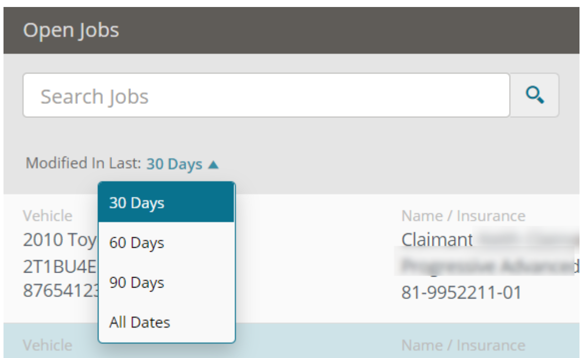
2. On the **Open Jobs** page, click the job you want to open.

Search for Jobs on the My Jobs Page

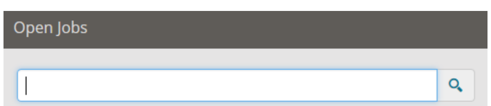
1. Select **Open** or **Closed** in the Jobs tab.

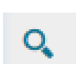


2. Set the **Modified in Last** filter to either 30 Days, 60 Days, 90 Days or All Dates to view jobs by time period.



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.

Start by setting the status to **Arrived at Shop**. The status must be set to **Arrived at Shop** before you can change to another status.

As you work with the vehicle, update the Repair Status in the following order:

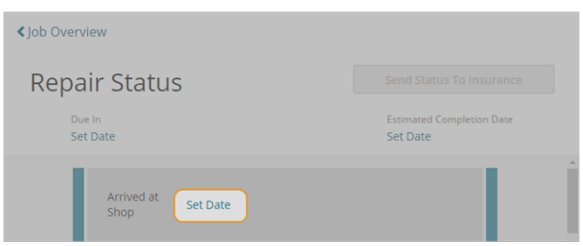
1. Arrived at Shop
2. Ready for Delivery
3. Delivered

View Repair Status

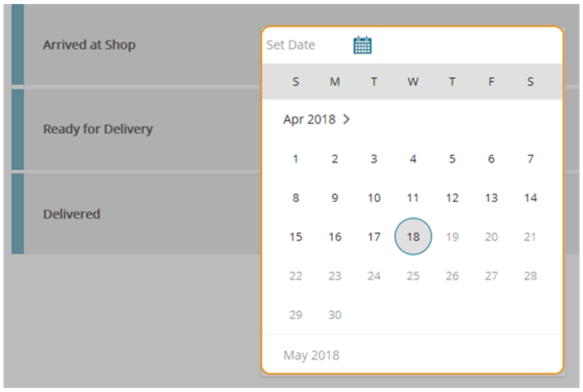
1. On the Job Overview page, click **Set Repair Status**. The **Repair Status** page appears.
2. Click the calendar next to the status you want to modify and select the date of the latest update.
3. If you are changing the Estimated Completion Date, select a reason for the change and click **Done**.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

Update Status

1. Select an open Job on the 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.



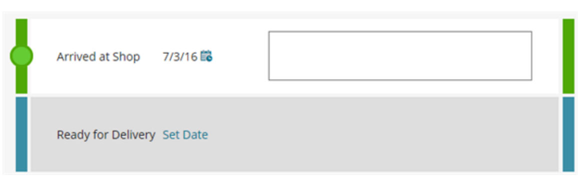
> **Note**: Only **Due In** date and **Estimated Completion Date** (ECD) can be set for the future. The **Set Date** field can be set for today or 365 days in the past.

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.

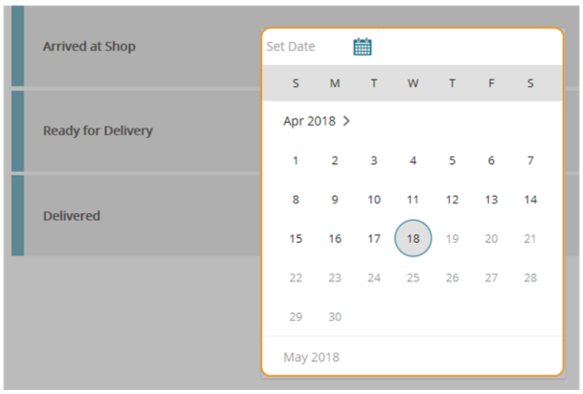
3. On the Repair Status page, click  next to the status you want to modify.
4. Type notes about the status update in the **Notes** field.



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

Edit Status Date

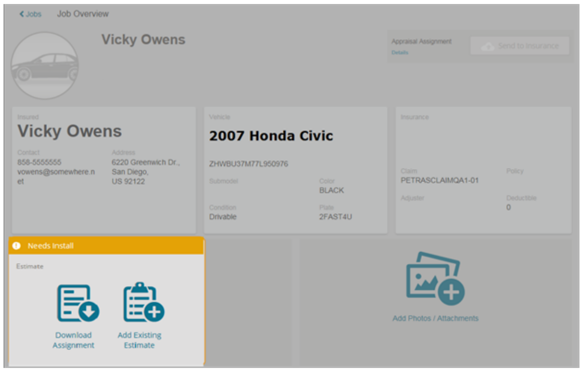
1. On the Job Overview page, click **Set Repair Status**. The **Repair Status** page appears.
2. Click the calendar next to the status you want to modify and select the date of the latest update.
3. If you are changing the Estimated Completion Date, select a reason for the change and click **Done**.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

4. Download Assignments

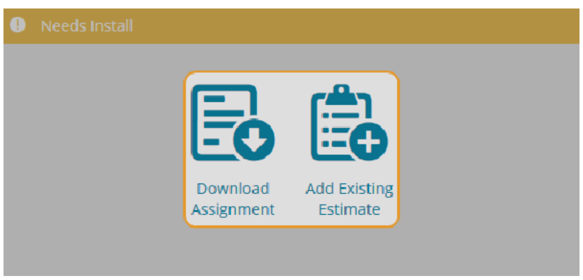
Avoid manually entering information by downloading the assignment details to your estimating system.



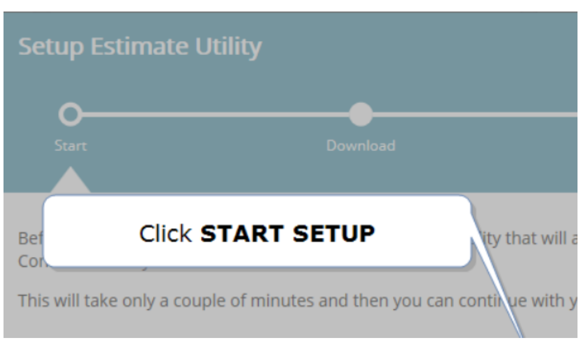
Before you can download assignment details to your estimating system or add an estimate to the job, you'll need to go through a quick installation.

Install the Desktop Utility

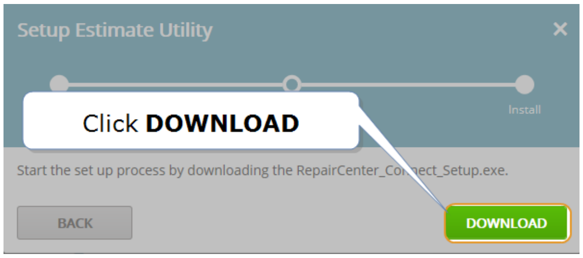
1. On the Job Overview page, click **Download Assignment** or **Add Existing Estimate**. The Setup Estimate Utility appears.



2. On the Setup Estimate Utility, click **Start Setup**.



3. On the Setup Estimate Utility, click **Download**.



4. Depending on your internet browser, do one of the following:

- **Chrome Browsers**: Click the Mitchell Connect .exe file at the bottom of your browser. Click **Run** and follow the prompts to complete the setup.
- **Internet Explorer**: Click **Run** at the security prompt at the bottom of your browser and follow the prompts to complete the setup.

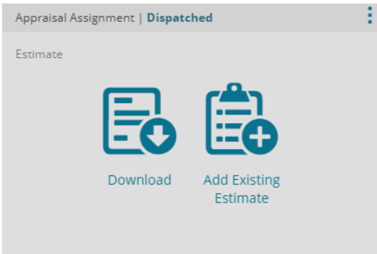
> **Note:** Install procedures vary depending on your internet browser and security settings. The install file typically displays at the bottom of the page.

Download assignment information

1. On the Job Overview page for the assignment, click **Download Assignment**.
2. When the assignment details successfully download, a success message displays on the card.

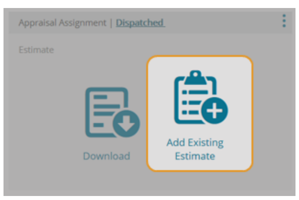
5. Add the Estimate to Mitchell Connect

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

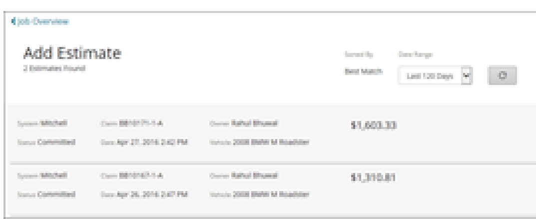


Add the estimate to Mitchell Connect

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 your estimate doesn't show, try the following:
   - Change the date range in the **Date Range** list.



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 Mitchell Estimating.
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.

6. 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

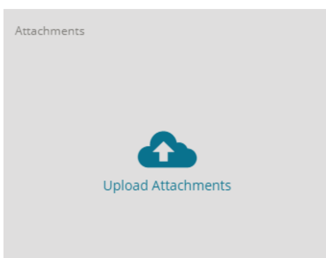
Add attachments

Send photos or other documents to the insurance company:

> **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.

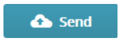
> **Note**: If an attachment fails to upload, Mitchell Connect will automatically retry the upload three times per attachment. On the third failed attempt, the Mitchell Connect Upload window clearly identifies any attachments that failed to upload. At the prompt, click **Retry All** to attempt to upload 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.

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, click one of the following:
    - Click **Total Loss** if the vehicle is beyond repair.
    - Click **Final** to use the invoice for payment.

> **Note:** If this is not a total loss, make sure the **Total Loss** check box is cleared.

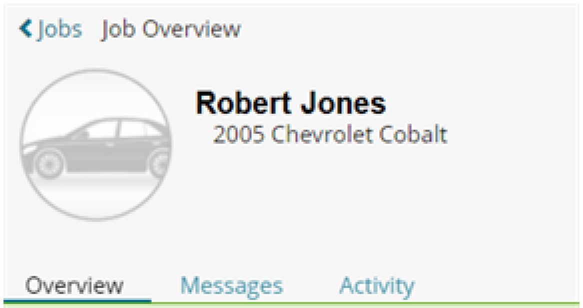
3. Click **Send**.

Messaging

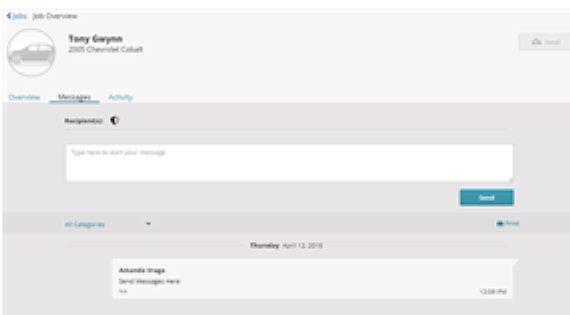
Use the messaging feature to send important messages to the insurance company directly from Mitchell Connect.

View Messages

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

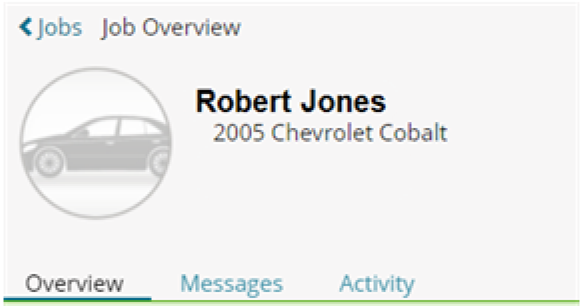


2. Messages display in the order they were sent. Scroll down to see additional messages, or click **Overview** to return to the Job Overview page.



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.

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.

> **Note:** 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.