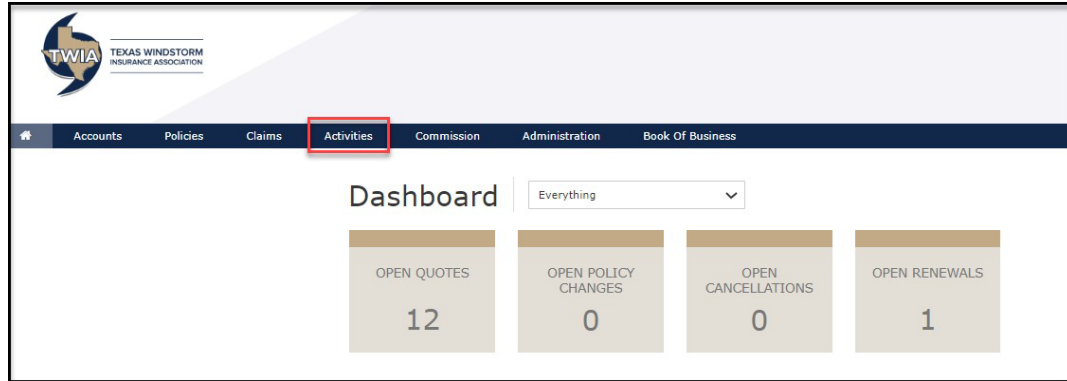


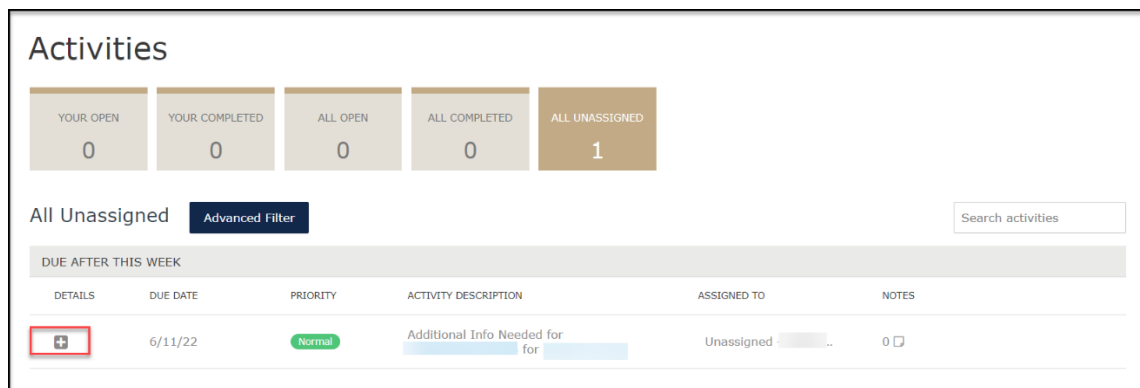
Completing Activities in the New Agent Portal

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

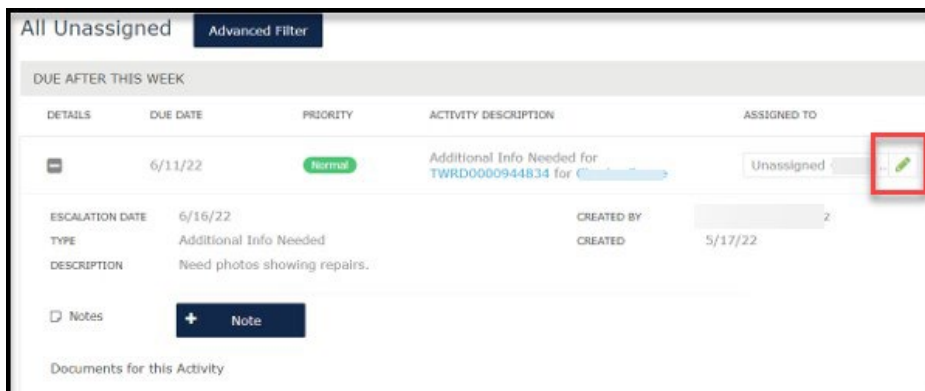
1. From the Agent Dashboard, select "Activities."



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



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




4. You can assign it to yourself by selecting “Me” from the drop-down menu and then click the green checkmark.



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.

DUE AFTER THIS WEEK

DETAILS	DUE DATE	PRIORITY	ACTIVITY DESCRIPTION	ASSIGNED TO	NOTES
	6/11/22	Normal	Additional Info Needed for TWRD0000944834 for [redacted]		0 <input type="checkbox"/> <input checked="" type="checkbox"/> Complete

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

CREATED BY [redacted]
CREATED 5/17/22

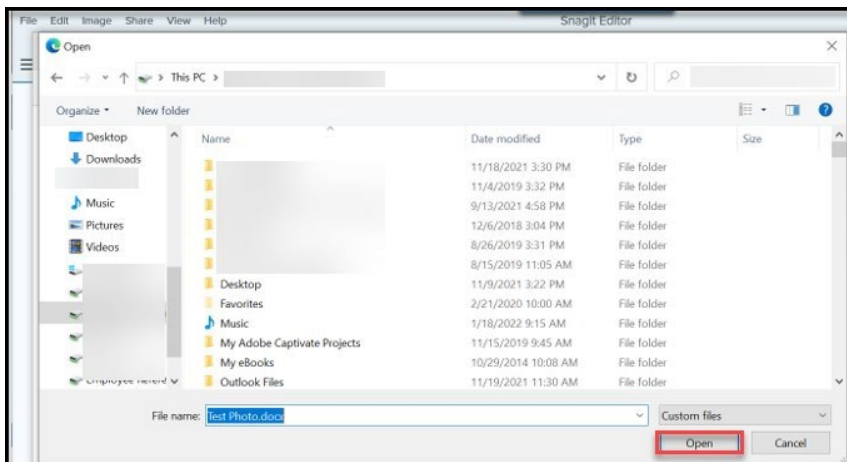
Notes

Documents for this Activity

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.

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 <input type="text"/>	<input type="text"/>	0

ESCALATION DATE 6/16/22 CREATED BY

TYPE Additional Info Needed CREATED 5/17/22

DESCRIPTION Need photos showing repairs.

Notes

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	<input type="text" value="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 <input type="text"/>	<input type="text"/>	0

ESCALATION DATE 6/16/22 CREATED BY

TYPE Additional Info Needed CREATED 5/17/22

DESCRIPTION Need photos showing repairs.

Notes

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.

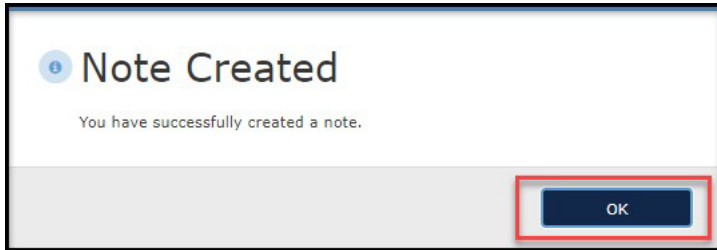
NAME	DESCRIPTION	DOCUMENT TYPE	DATE UPLOADED	SAVE
Test Photo.docx	Repairs Made 5-2022	Photo	05/17/2022	



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, there is a header "DUE AFTER THIS WEEK". Below it is a table with columns: DETAILS, DUE DATE, PRIORITY, ACTIVITY DESCRIPTION, ASSIGNED TO, and NOTES. The first row shows a task with a due date of 6/11/22, priority of Normal, and activity description "Additional Info Needed for TWRD0000944834 for [redacted]". 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 in the NOTES column. The "Complete" button is highlighted with a red box. Below the notes section, there is a "+ Note" button. Underneath, there is a section for "Documents for this Activity" with a dropdown menu set to "Photo", an "Upload Documents" button, and a "Search documents" field. Below this, there is a red warning message: "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." Below the warning, there is a disclaimer: "Do not upload files containing illegal content or copyrighted information without the permission of the copyright owner. File names must not exceed 60 characters (including the file type extension). Files must not exceed 20MB." At the bottom, there is a table with columns: NAME, DESCRIPTION, DOCUMENT TYPE, DATE UPLOADED, and SAVE. The first row shows a document named "Test Photo.docx" with description "Repairs Made 5-2022", document type "Photo", and date uploaded "05/17/2022".



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

Activities

YOUR OPEN 0 YOUR COMPLETED 1 ALL OPEN 0 ALL COMPLETED 1 ALL UNASSIGNED 0

All Unassigned [Advanced Filter](#)

DUE AFTER THIS WEEK

DETAILS	DUE DATE	PRIORITY	ACTIVITY DESCRIPTION	ASSIGNED TO	NOTES
	-	Normal	Additional Info Needed for TWRD0000944834 for <input type="text"/>	<input type="text"/>	1 ✔ COMPLETED

