



AGENT TASK VISIBILITY ENHANCEMENT

PHASE 1 - ALLOW USERS TO SEE TASKS WITHIN THEIR VISIBILITY

TASK VISIBILITY – PHASE 1 CHANGES

Previously, agent tasks on the “Action Required” tab in Trident were only visible to the agent of record.

Phase 1 of enhancing the agent task view allows users to see and complete tasks for policies that are within the users data visibility. This allows agents to see each other’s tasks and complete tasks if needed.

Examples:

- Amber Agent is helping Alice Agent complete some tasks while she's out of office.
- Margi Manager wants to see the tasks for the agents in her office to help where she can.

Future phases of enhancements will be to allow users to search for a task, export task data to a CSV file, task paging, and allow task filtering within the “Action Required” tab.

ACTION REQUIRED TAB

- The action required tab will have two views: My Work & All Work.
- My Work shows all of the tasks for policies that belong to the logged in user.
 - Tasks are displayed with the oldest on top.
 - I can complete my task from the task list.
- All Work shows tasks for policies that I have visibility into.
 - Tasks are displayed with the oldest on top.
 - I can complete any task from the “all tasks” list.
 - Up to 55 tasks can be displayed on the page.

ACTION REQUIRED – MY WORK

DASHBOARD

Action Required (2) Recent Work Renewals

My Work All Work

Action Required / Short Description	Insured Name	Elapsed	Time Left	Premium	
Primary Residence	BETTY LUCY KANGAS	3 days	26 days	N/A	Please provide Proof of Primary Residence to complete your application
Primary Residence	BETTY TALIA MARIE KANGAS	3 days	26 days	N/A	Please provide Proof of Primary Residence to complete your application

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ACTION REQUIRED – ALL WORK

DASHBOARD

[Action Required \(2\)](#) [Recent Work](#) [Renewals](#)

[My Work](#) [All Work](#)

Action Required / Short Description	Insured Name	Elapsed	Time Left	Premium	
Review Proof of Condo RCV	[NO INSURED NAME]	6 days	23 days	N/A	
Review Proof of Condo Ownership	[NO INSURED NAME]	6 days	23 days	N/A	
Primary Residence	BETTY LUCY KANGAS	3 days	26 days	N/A	Please provide Proof of Primary Residence to complete your application
Primary Residence	BETTY TALIA MARIE KANGAS	3 days	26 days	N/A	Please provide Proof of Primary Residence to complete your application
Primary Residence	BETTY CHRISTINE RUONAVAARA	3 days	26 days	N/A	Please provide Proof of Primary Residence to complete your application

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