

## Tasks are outstanding items that need to be completed by your agency

Go to **GAINSCOconnect.com**  
Choose **Reports > Tasks**

Tasks can include missing prior coverage proof, proof of not at fault accident, or other needed items

REPORTS
Policies Issued
Policy Changes
Pending Cancellations
Canceled Policies
Renewal Offers
eSignature Report
Commission Statement
MVR Chargebacks
Sweep Reconciliation
<b>Tasks</b>

Due Date	Title	Policy/Quote #
8/11/2020	POP Review Agency	OHPAZ100XX
8/11/2020	Not at Fault	PA1475Q286

[View All Tasks](#)

**View All Tasks** lets you see all tasks for your agency, pick up tasks, or work your personal My Tasks list

### Urgent Tasks

Tasks in this section are due today and should be worked immediately

Most tasks must be resolved within 3 days to avoid adverse policy action—set a calendar reminder to check tasks throughout the week

## How To Work Tasks

### Step 1: Pick up the task

Choose **View All Tasks** to see unassigned tasks in **Items Available for Pick Up**

- ▶ Click the title of the task to open it
- ▶ In Task Details, select **Pick Up** to move the task to your own personal My Tasks list, which contains all tasks assigned to you

### Step 2: Open & edit the task

Select **Edit** to complete the required fields

- \* **DOCUMENT TYPE:** Select from the options provided
- \* **FILENAME:** Click **Browse...** to select documentation you wish to attach
- \* **CAPTION:** Add detailed information to clarify document content

### Step 3: Attach files & complete task

Click **Add** to attach the documentation

- ▶ Blank fields will appear to allow additional attachments
- ▶ Once all documents have been added, click **Save & Complete** to submit to Underwriting

Select **yes** to confirm you want to finalize your submission

*Please note that further edits will not be enabled once the task has been marked as complete*

### INSIDER SCOOP

Documentation you have submitted can be viewed in **Notes/Document Upload**

The document will appear alongside other items

To help you easily identify the document, the **caption** you created in Step 2 will appear as the caption in the Notes/Document Upload form list