

CCC® Shop Scheduling - Smart Appraiser Search: Repair Facilities

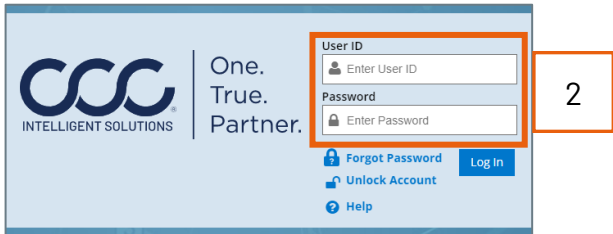
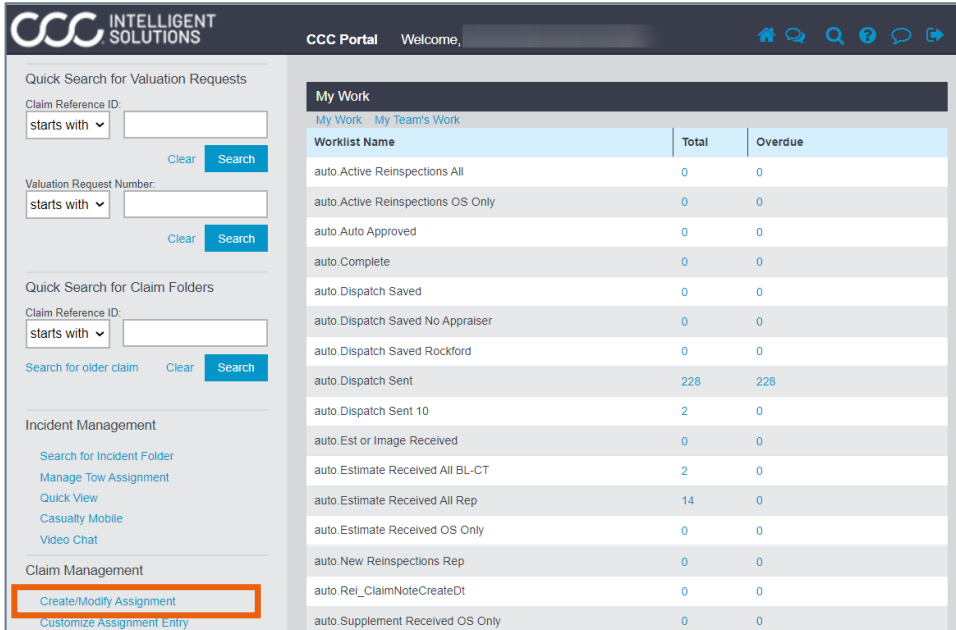
Overview

Smart Appraiser Search lets you sort and filter your search results for Repair Facilities using advanced filters, shop profile information, and Carwise reviews.

Using this information, you can then view shop schedules and book appointments with the shops for your customers. This job aid describes how to search for repair facilities and then book an appointment on the shop's calendar.

Accessing Scheduling Settings

To access Scheduling Settings, log into the CCC Portal using the following steps:

Step	Action
1	Go to mycccportal.com . The login page opens. 
2	Enter your User ID and Password , then click on Log In . The CCC Portal Home page opens.
3	In the Claim Management section on the portal home page, select the Create/Modify Assignment link. The Create/Modify Assignment - Enter Key Data page opens. 

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Assignment Entry Page

Step	Action
4	Enter a Claim Reference ID .
5	Click Create/Modify Assignment .
6	Complete the fields. Note: Be sure to complete all required "*" fields.
7	Select the Proceed To Booking button at the bottom of the Assignment Entry page.

The screenshot displays the 'Assignment Entry' page in the CCC Intelligent Solutions system. The page has a dark header with the CCC logo and 'Assignment Entry' title. A left sidebar contains 'Quick Links' such as Loss, Adjuster, Claim Parties, Claim, Vehicle, Vehicle Damage, Appraiser, Policy, Policy Agent, Method of Inspection, and Bottom of Page. The main form area is titled 'Policy Agent' and includes fields for Last Name, First Name, ID, License, Agent Type, Phone Number, Address 1, Address 2, City, State / Province, and Postal Code. Below this is the 'Method of Inspection' section with fields for Inspection Location and Inspection Type. At the bottom, there are buttons for 'Cancel Entry', 'Cancel Send', 'Send', and 'Proceed To Booking'. The 'Proceed To Booking' button is highlighted with a red box and labeled with the number 7.

Clicking on the **Proceed To Booking** button opens the **Smart Search** criteria page. Any information that you enter will be saved automatically, even if you leave the page without booking.

Note: The Appraiser Name and Appraiser Type fields are not required. All entered information is saved unless the assignment has already been sent. Click **Cancel Entry** then **Confirm Cancel Entry** to remove the Assignment Entry.

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Smart Search in Assignment Entry - Vehicle Make

The Vehicle Make selected in assignment entry will be available as a certification filter option in the Smart Search RF search results:

For example, if the vehicle make "Honda" is selected on the assignment, then "Honda" will be available as a certification filter in shop search results:

The screenshot displays the Smart Appraiser Search interface. At the top, there are input fields for Address, City, State, Zip Code (90000), and Radius (15 miles). Below these is a 'Repair Facility' section. The 'Advanced Filters' section includes options for Network (In Network, Out of Network, All Shops), Open on Weekends (Yes, No, All Shops), Carwise Ratings (5 stars), and DRP Score (Select). The 'Certifications' section is highlighted with an orange box and contains a search bar with 'Honda' selected and 'I-Car Gold' as an option. Below the filters is a table of repair facilities. The first facility, 'CCC CAR', is highlighted. The table columns are Name, Address, Hours, Distance, Services, Description, Carwise Ratings, Rank, Scorecard, Certifications, and Action.

Name	Address	Hours	Distance	Services	Description	Carwise Ratings	Rank	Scorecard	Certifications	Action
CCC CAR	1 Way Street The Beach, CA 90000 (555)555-5555	Sun: 09:00 AM - 03:00 PM Mon: 06:00 AM - 06:00 PM Tue: 09:30 AM - 05:00 PM Wed: 07:00 AM - 10:00 PM Thu - Fri: 09:00 AM - 05:00 PM Sat: 10:00 AM - 11:00 AM	0	Automotive Glass Replacement, Detailing, Free Estimates, Full Service Mechanical, Insurance Company Assistance, Lifetime Warranty, Motorcycle Repair, On-site Car Rental, Paintless Dent Repair, Towing					Acura Honda BMW MINI RAM Scion Toyota	

Note: The Certifications filter is an 'AND' filter, **not** and/or. For example, if only Honda is checked, the search results will **only** display the shops that match the **Honda** filter criteria. If both Honda and I-CAR Gold are checked, the list will only display the shops that match **both** criteria, so shops with only Honda or I-CAR Gold, but not both, will not be displayed.

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Predictive MOI Recommendations

*For authorized users only!

The **Get MOI Recommendations** button is displayed only for **authorized users** on their Assignment Entry page. The recommendations will appear on the Assignment Entry and Search for Appraiser pages when the button is clicked.

The diagram illustrates the process of accessing MOI Recommendations. It starts with the 'Assignment Entry' page, where a button labeled 'Get MOI Recommendations' (marked with a blue box and the number 1) is shown. An arrow points from this button to a detailed view of the 'Assignment Entry' page. In this view, the 'Get MOI Recommendations' button is again highlighted (marked with a blue box and the number 2). Below the button is a table of recommendations.

Priority	Suggestion	Total Loss Category
1	Send to Estimate from Photos	Repair
2	Send to DRN	Repair
3	Send to Open Shop	Repair

The diagram shows the 'Search for Appraiser' page. A blue box labeled 'MOI Recommendations' (marked with a blue box and the number 4) is shown on the left side of the page. An arrow points from this box to a detailed view of the 'Search for Appraiser' page. In this view, the 'MOI Recommendations' table is highlighted (marked with a blue box and the number 4). To the right of the table is a button labeled 'Proceed To Booking' (marked with a blue box and the number 3). An arrow points from the 'Proceed To Booking' button back to the 'MOI Recommendations' table.

Priority	Suggestion	Total Loss Category
1	Send to Estimate from Photos	Repair
2	Send to DRN	Repair
3	Send to Open Shop	Repair
4	Send to IPD	Repair
5	Send IA	Repair

Note: Recommendations will not be displayed on the Smart Search criteria page if the "Get MOI Recommendations" button is not used in Assignment Entry page:

The screenshot shows the 'Search for Appraiser' page. The 'Appraiser Search' section is visible, with the 'Type' dropdown set to 'Staff Appraiser'. The 'Location Details' section is also visible, with fields for 'Address', 'City/State', 'Zip Code', and 'Radius'. The 'Search' button is at the bottom right.

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Repair Facility Search Criteria

You can use the following criteria to search for a Repair Facility:

- **Appraiser Type** (required)
 - **Location Details:**
 - Zip Code (required)
 - Radius (required)
 - Address (optional)
 - City (optional)
 - State (optional)

Once you have entered the desired criteria, click the **Search** button.

Note: The vehicle location on the assignment is pre-populated in Location Details on the Smart Appraiser Search criteria page.

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Appraiser Search and Scheduling

Claim Reference ID: BH11111111

Type*

☐ Staff Appraiser ☒ Repair Facility ☐ Drive-in ☐ Independent Appraiser

* Required

Location Details

Address: 000 Merchandise Mart

City: Chicago

State: Illinois

Zip Code*: 60000

Radius (in miles)*: 25

Clear Search

Advanced Search Filters

With Smart Appraiser Search, you will be able to see the following information in your search results:

- **Network Indicator:** Filters search results by In-Network or Out-of-Network status.
- **Open on Weekends:** Filters search results by shops' opening days on weekends.
- **Carwise Star Ratings:** Filters search results by the number of stars the shop has.
- **DRP Scorecard:** Filters search results by the DRP Scorecard.
- **Certifications:** Filters search results based on what certifications the shop has.

Advanced Filters

Network: ☐ In Network ☐ Out of Network ☒ All Shops

Open on Weekends: ☐ Yes ☐ No ☒ All Shops

Carwise Ratings: ★ ★ ★ ★ 0 & up

DRP Score: Select



Certifications: ☐ Honda ☒ I-Car Gold

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Search Results

Once you receive your results, they are paginated, with 10 shops listed per page. The following information is displayed in the search results:

- **Name**
- **Address:** The shop's location
- **Hours:** The shop's business hours for different days
- **Distance:** From vehicle location
- **Services:** The services the shop is providing
- **Description:** The shop's description
- **Carwise Star Ratings:** The shop's star rating on Carwise.com
- **Rank:** The most current rank for the selected repair facility as a function of Score
- **Scorecard:** Calculation based on a custom weighting of the KPIs in the scorecard
- **Certification:** The OEM and technician certifications
- **Action:**
 -  **Select:** To send an assignment to a shop without booking an appointment
 -  **Book Appointment:** To book an appointment with the shop and send assignment to the shop


Repair Facility										
Name	Address	Hours	Distance	Services	Description	Carwise Ratings	Rank	Scorecard	Certifications	Action
 Cerritos	Park Plaza Cerritos, CA 90307 (333)333-XXXX	Sun: 07:00 AM - 08:00 PM Mon: 07:00 AM - 09:00 PM Tue: 07:00 AM - 06:00 PM Wed - Thu: 03:00 PM - 10:00 PM	0.3	Automotive Glass Replacement, Detailing, Free Estimates, Full Service Mechanical, Insurance Company Assistance, Lifetime Warranty, Motorcycle Repair, On-site Car Rental, Paintless Dent Repair, Towing		★★★★☆ 2.8				
 Carcompany	77777 Shademaker Road Cerritos, TX 77777 (777)777-XXXX		1.9	Automotive Glass Replacement, Detailing, Free Estimates, Full Service Mechanical, Insurance Company Assistance, Lifetime Warranty, Paintless Dent Repair, Towing		★★★★☆ 2.5				
 CCC ONE AUTO	Candlewood Ave Cerritos, CA 44444 (444)444-XXXX	Mon - Fri: 07:00 AM - 06:00 PM Sat: 07:00 AM - 01:00 PM	4	Automotive Glass Replacement, Detailing, Free Estimates, Full Service Mechanical, Insurance Company Assistance, Lifetime Warranty, Paintless Dent Repair, Towing		★★★★★ 4.5				
 ANAHEIM	Cerritos St Cerritos, CA 22222 (222)222-XXXX	Sun: 09:00 AM - 03:00 PM Mon: 10:00 AM - 06:00 PM Tue: 09:00 AM - 05:00 PM Thu - Fri: 09:00 AM - 05:00 PM Sat: 10:00 AM - 11:00 AM	7.5	Automotive Glass Replacement, Detailing, Free Estimates, Full Service Mechanical, Insurance Company Assistance, Lifetime Warranty, Motorcycle Repair, On-site Car Rental, Paintless Dent Repair, Towing		★★★★☆ 2.8				

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Shop Profile

The CCC ONE shop profile is accessible through the shop name hyperlink in search results. Click the shop name link to go to CCC ONE shop profile for the shop:

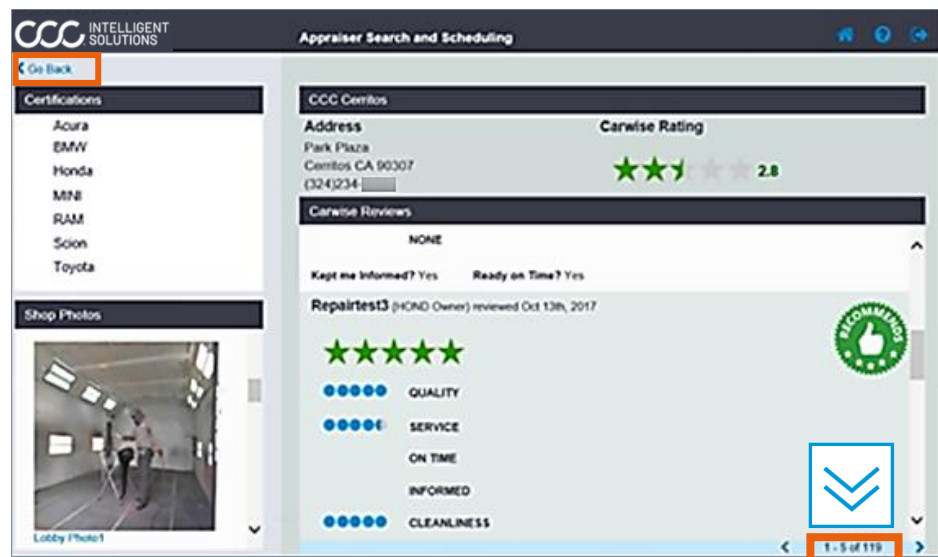
Repair Facility						
Name	Address	Hours	Distance	Services	Description	Carwise Ratings
CCC Cerritos	Park Plaza Cerritos, CA 90307 (555)555-XXXX	Sun: 05:00 AM - 06:00 PM Mon: 05:00 AM - 07:00 PM Tue: 05:00 AM - 04:00 PM Wed - Thu: 01:00 PM - 08:00 PM	0.3	Automotive Glass Replacement, Detailing, Free Estimates, Full Service Mechanical, Insurance Company Assistance, Lifetime Warranty, Motorcycle Repair, On-site Car Rental, Paintless Dent Repair, Towing		 2.9

The following information is available:

- Shop address
- Shop contact
- Certifications
- Shop Photos
- Carwise Rating
- Carwise Review

NOTE: Click on **Go Back** at the top left to return to Smart Appraiser Search criteria:

The shop's Carwise review is available in the shop profile (5 records /page)



Sorting

The following columns are sortable on the search results page:


- Distance
- Carwise Ratings
- Scorecard

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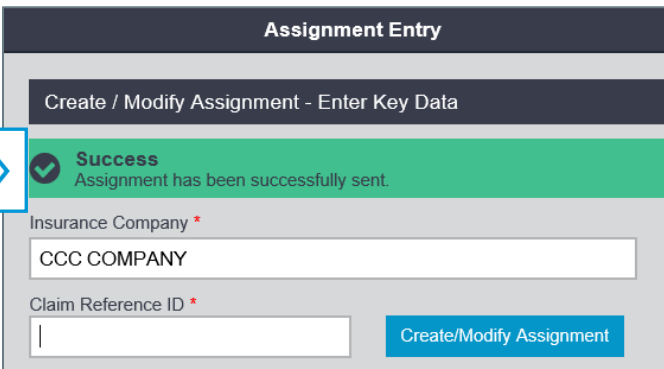
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Send an Assignment to a Shop

You can continue to send assignments to any shop in the search results without booking an Insurance appointment.


Click the hand icon  to send the assignment to the selected shop.

A 'Success' message is displayed on the Assignment Entry page after you send the assignment.



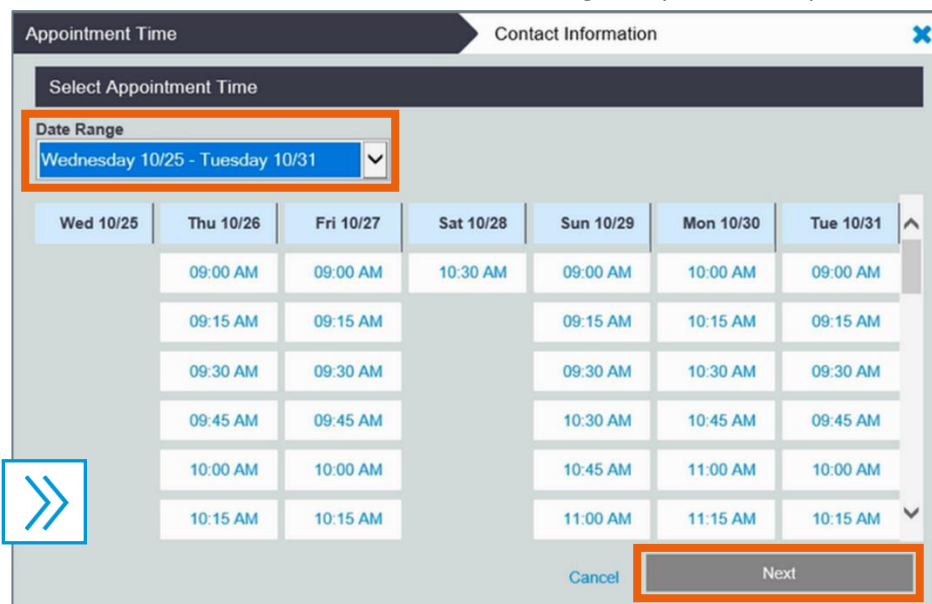
The screenshot shows the 'Assignment Entry' form. At the top, it says 'Create / Modify Assignment - Enter Key Data'. Below this, a green success message box states: 'Success Assignment has been successfully sent.' Underneath the message, there are input fields for 'Insurance Company' (with 'CCC COMPANY' entered) and 'Claim Reference ID'. A blue button labeled 'Create/Modify Assignment' is at the bottom right. A blue double arrow icon points to the success message box.

Get Shop Schedule and Book Appointment

Shops with a bookmark icon are available for Get Schedule and Appointment Booking. If you want to book an appointment with the Shop, click the bookmark icon  to get shop schedules and select appointment slots. The assignment is delivered to the shop once the appointment is scheduled.

The shop schedule is retrieved once a week. Select the **Date Range** drop down to open the shop schedule for different weeks. You can get the schedule from the current week up through one month. The current schedule displays the day and the following 6 days.

Select a time slot here and click on **Next** to go to the appointment contact screen.



The screenshot shows the 'Appointment Time' selection screen. At the top, there are tabs for 'Appointment Time' and 'Contact Information'. Below the tabs, a 'Select Appointment Time' section contains a 'Date Range' dropdown menu currently set to 'Wednesday 10/25 - Tuesday 10/31'. Below the dropdown is a grid of appointment slots for the days: Wed 10/25, Thu 10/26, Fri 10/27, Sat 10/28, Sun 10/29, Mon 10/30, and Tue 10/31. Each day has a list of time slots (e.g., 09:00 AM, 09:15 AM, etc.). A blue double arrow icon points to the 'Next' button at the bottom right, which is highlighted with an orange box. A 'Cancel' button is also visible next to it.

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Get Shop Schedule and Book Appointment continued

On the appointment contact screen, the personal and the vehicle information is also pre-populated from Assignment Entry.

To book an appointment, the following information is pre-populated or defaulted for you to update.

Personal Information:

- **First Name:** Required (Pre-populated)
- **Last Name:** Required (Pre-populated)
- **Phone Number:** Required (Pre-populated)
- **Email:** Optional (Pre-populated)
- **Contact Preference:** Default to Text
- **Agreement checkbox:** Required if Text or Email is selected as contact preference

Vehicle Information:

- **Vehicle Year:** Optional (Pre-populated)
- **Vehicle Make:** Optional (Pre-populated)
- **Vehicle Model:** Optional (Pre-populated)
- **Damage Description:** Optional

The screenshot shows a web form titled "Appointment Time" and "Contact Information". The form is divided into two main sections: "Enter Personal Information" and "Enter Vehicle Information".

Enter Personal Information:

- First Name:** Text input field with "K" entered.
- Last Name:** Text input field with "Paza" entered.
- Phone Number:** Text input field with "(333)333-" entered.
- Email:** Text input field with "@hotmail.com" entered.
- Contact Preference:** Radio buttons for "Text" (selected), "Email", and "None".
- Agreement checkbox:** A checkbox labeled "I agree to receive communication on the preferred contact method for this appointment. Text and data rates may apply."

Enter Vehicle Information:

- Year:** Dropdown menu with "2017" selected.
- Make:** Dropdown menu with "Mazda" selected.
- Model:** Dropdown menu with "CX-5 Grand Touring" selected.
- Damage Description:** Text area with "Please enter comments..." placeholder.

At the bottom right, there are two buttons: "Cancel" and "Book & Send Assignment". The "Book & Send Assignment" button is highlighted with an orange border.

Once the required information is filled-in, you can click the **Book & Send Assignment** button to book an appointment and send the assignment to the shop.

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Get Shop Schedule and Book Appointment continued

A success message with the appointment time displays on the Assignment Entry page when the appointment is booked:

Assignment Entry

Create / Modify Assignment - Enter Key Data

Success

Assignment Booked and Assignment sent. Scheduled for August 23, 2017 at 10:00 AM with CCC CERRITOS

Reschedule an Appointment

To reschedule an appointment from the Portal Smart Search page, select a new appointment slot. This automatically cancels the previous appointment and a new appointment will be booked for the new slot.

Cancel an Appointment

To cancel an appointment, go to the Assignment Entry page, select **Cancel Send**, and then click on **Confirm Cancel Send** (this cancels the assignment and appointment).

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Assignment Entry

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Quick Links

Loss

Adjuster

Claim Parties

Claim

Vehicle

Vehicle Damage

Appraiser

Policy

Policy Agent

Method of Inspection

Bottom of Page

Policy Agent

Last Name

First Name

ID

License

Agent Type

Phone Number

Address 1

Address 2

City

State / Province

Postal Code

Method of Inspection

back to the top

Inspection Location

Inspection Type

Cancel Entry

Cancel Send

Send

Proceed To Booking

Sending an assignment to a different appraiser from the Assignment Entry page cancels the appointment for the previous appraiser.

When a new appointment is scheduled from the Smart Search page, the previous appointment is cancelled automatically.

Note: Cancelling an appointment does not affect the assignment, but if the assignment is cancelled, the appointment will also be cancelled.