

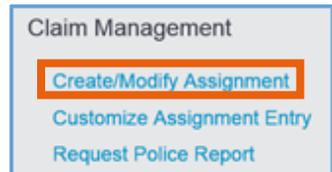
CCC® Shop Scheduling – Smart Appraiser Search: Staff/Drive-In

Overview

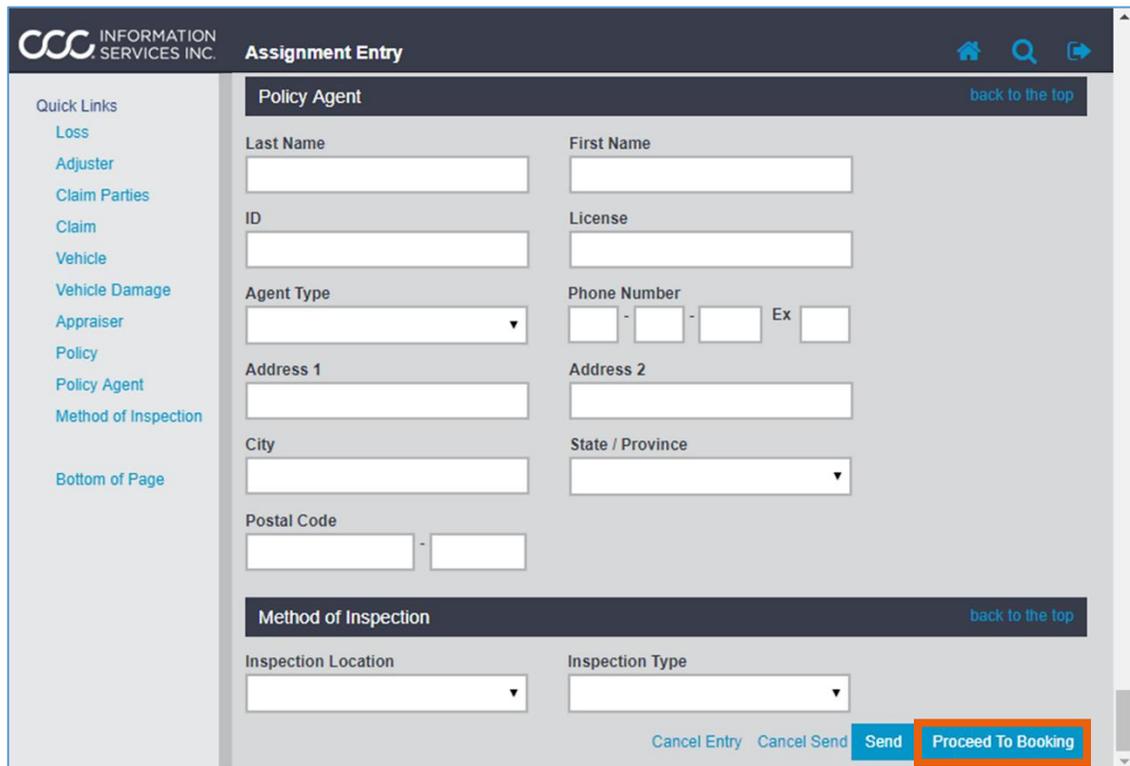
The existing CCC® Scheduling provides the ability to search for Staff Appraisers and Drive-In facilities, and to book appointments. With the new Smart Search in Assignment Entry, you can search for Staff Appraisers and Drive-Ins, and book appointments directly from your Smart Search results.

Assignment Entry Page

When you enter the CCC Portal, click on the **Create/Modify Assignment link** (on the left side panel under Claim Management) to open the Assignment Entry page. Then complete the fields shown. Be sure to complete all required fields "✳".



The **Proceed To Booking** button is at the bottom of the Assignment Entry page:

A screenshot of the 'Assignment Entry' form in the CCC portal. The form is titled 'Assignment Entry' and has a 'Policy Agent' section. It includes fields for Last Name, First Name, ID, License, Agent Type (a dropdown menu), Phone Number (with separate fields for area code, number, and extension), Address 1, Address 2, City, State / Province (a dropdown menu), and Postal Code. Below this is a 'Method of Inspection' section with fields for Inspection Location (a dropdown menu) and Inspection Type (a dropdown menu). At the bottom right, there are buttons for 'Cancel Entry', 'Cancel Send', 'Send', and 'Proceed To Booking' (highlighted with an orange border). A 'back to the top' link is visible in the top right corner of the form area.

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.

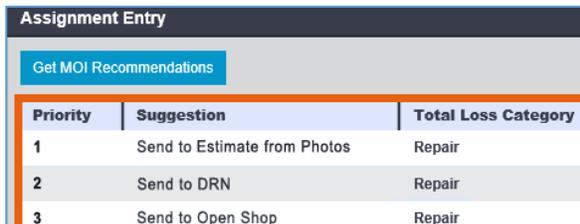
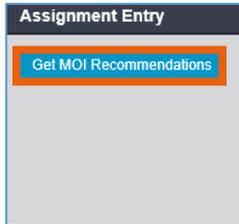
NOTE: The Appraiser Name and Appraiser Type fields are *not* required.
All entered information is saved unless the assignment has already been sent.

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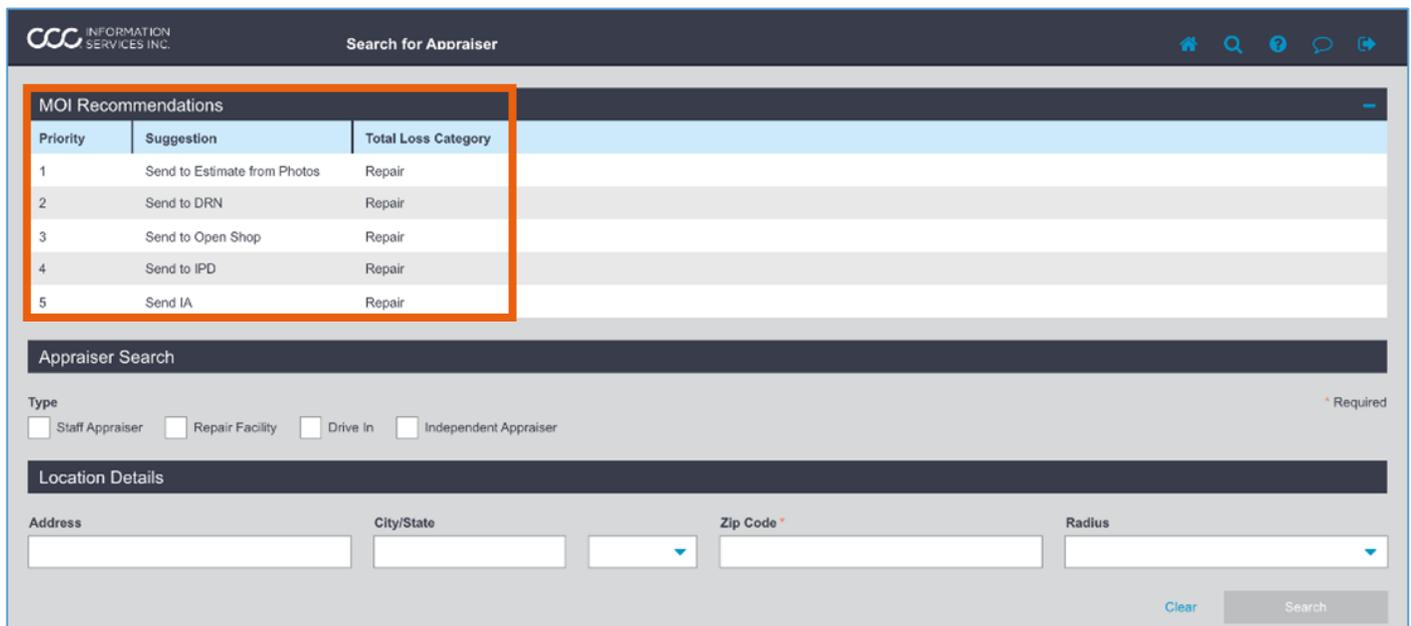
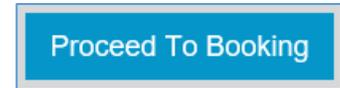
CCC® Shop Scheduling – Smart Appraiser Search: Staff/Drive-In, Continued

Predictive MOI Recommendations only for authorized users

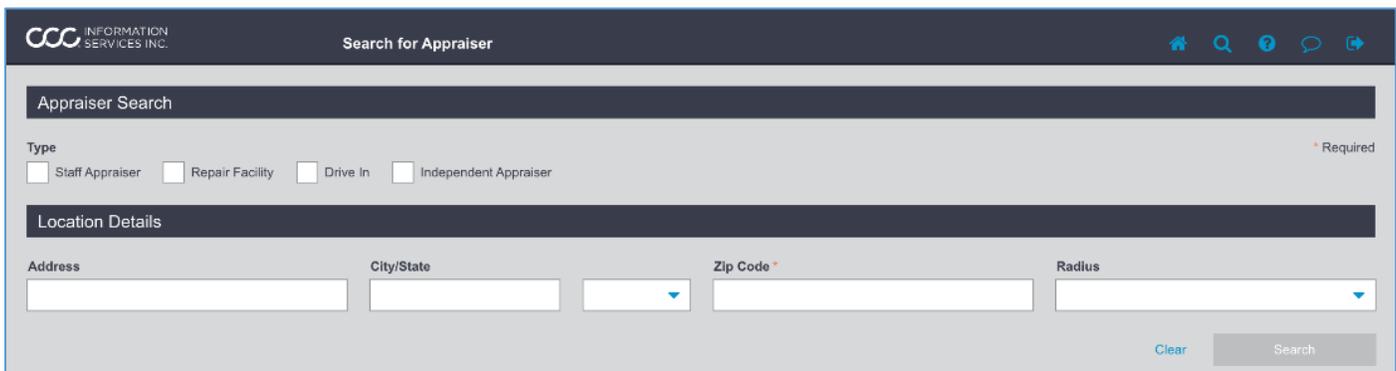
The **Get MOI Recommendations** button is displayed only for **authorized users** on their Assignment Entry page. The recommendations will appear on the Assignment Entry and Search for Appraiser pages when they click on the button.



The **Proceed To Booking** button on the Assignment Entry page opens the Smart Search criteria page:



NOTE: Recommendations will not be displayed (as shown below) on the Smart Search criteria page if the "Get MOI Recommendations" button is not used in Assignment Entry page:



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CCC® Shop Scheduling – Smart Appraiser Search: Staff/Drive-In, Continued

Staff Appraiser Search Criteria

You can use the following criteria to search for a Staff Appraiser:

- **Appraiser Type** (required)
- **Location Details**
 - Address (required)
 - City (required)
 - State (required)
 - Zip Code (required)
 - Radius (optional)
- **Appointment Details**
 - Appointment Type (required)
 - Appointment Duration (required)
 - Appointment Window (required)
 - Skills (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.

A screenshot of the CCC Information Services Inc. "Appraiser Search and Scheduling" web interface. The page has a dark header with the CCC logo and navigation icons. Below the header, there are radio buttons for "Type": "Staff Appraiser" (checked), "Repair Facility", "Drive-in", and "Independent Appraiser". A "Claim Reference Id: BH1111111" is displayed with a red asterisk indicating it is required. The "Location Details" section is highlighted with an orange box and contains input fields for "Address" (000 Merchandise Mart), "City" (Chicago), "State" (Illinois), "Zip Code" (60000), and "Radius (in miles)". The "Appointment Details" section includes a "Type" dropdown (DeskReview), "Duration" (60), and "Window" (2 hours) dropdown. The "Skills" section has checkboxes for "Car Salvage", "Car Theft", "Car-Major Damage", "Car-Minor Damage", "Car-Total Loss", "Casualty-Injury", "DEP Photo", and "DEP Traditional" (checked). A "Clear" button and a "Search" button (highlighted with an orange box) are at the bottom right.

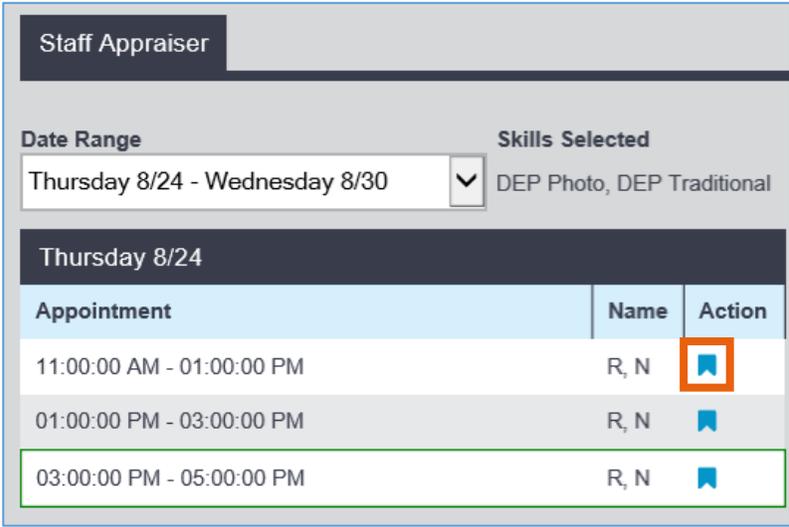
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Staff Appraiser Search Results

Staff appraiser search results include the below information:

- **Date Range**
- **Appointment** window slots
- **Corresponding appraiser** to each appointment window slot
- **Action: Book Appointment:** to book an appointment with the appraiser: 

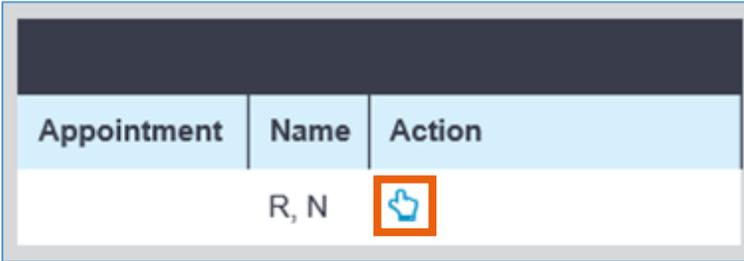
The Staff appraiser appointment window results are displayed in a weekly basis with the current day of the week as the start date.



Staff Appraiser		
Date Range	Skills Selected	
Thursday 8/24 - Wednesday 8/30	DEP Photo, DEP Traditional	
Thursday 8/24		
Appointment	Name	Action
11:00:00 AM - 01:00:00 PM	R, N	
01:00:00 PM - 03:00:00 PM	R, N	
03:00:00 PM - 05:00:00 PM	R, N	

Send assignment to staff without booking an appointment in Smart Search: 

At the bottom of staff appraiser search results, there will always be an option to send assignment to an appraiser without booking an appointment. The appraiser in this option could be any appraiser who covers the territory.



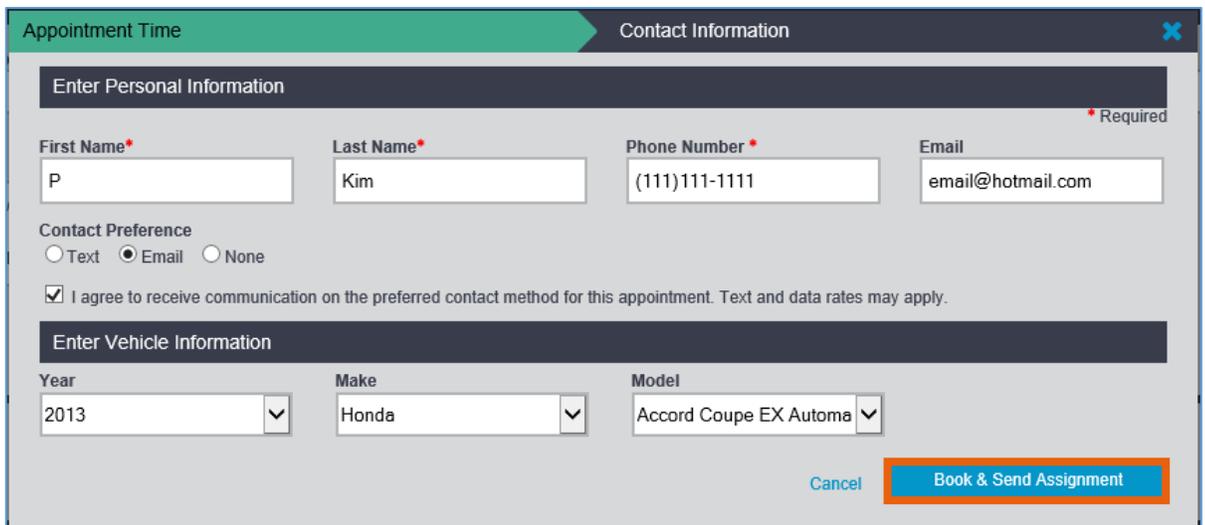
Appointment	Name	Action
	R, N	

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Book Staff Appointment Select any bookmark icon  under Action in the search result to book a staff appointment with the associated appointment window.

Appointment	Name	Action
11:00:00 AM - 01:00:00 PM	R, N	
01:00:00 PM - 03:00:00 PM	R, N	
03:00:00 PM - 05:00:00 PM	R, N	

When you select a slot, an information window pop-up is displayed to enter the appointment contact information. You can book an appointment and send an assignment when the “*Required” fields are completed:



The personal and vehicle information is pre-populated from Assignment Entry:

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:

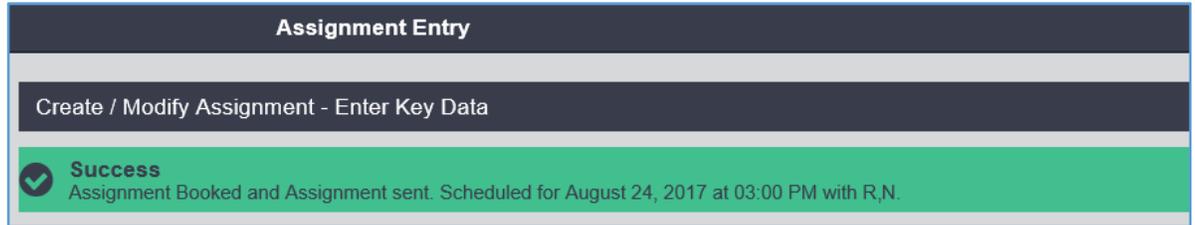
- Vehicle Year: Optional (Pre-populated)
- Vehicle Make: Optional (Pre-populated)
- Vehicle Model: Optional (Pre-populated)

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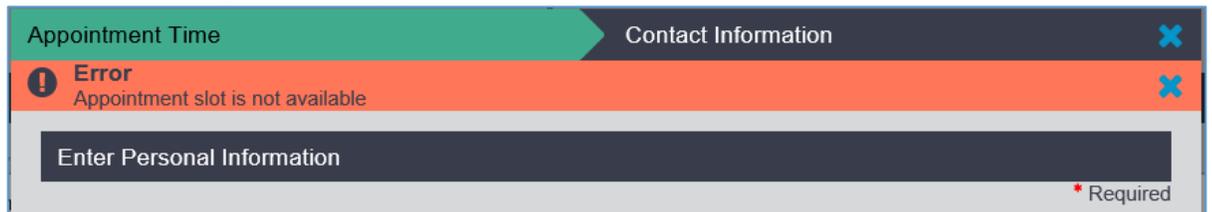
CCC® Shop Scheduling – Smart Appraiser Search: Staff/Drive-In, Continued

Book Staff Appointment continued

A success message will be displayed in Create/Modify Assignment page after the appointment is booked successfully:



If the selected appointment slot is taken when you click Book & Send Assignment, an error message will indicate that the appointment slot is not available: You can re-run your staff appraiser search to find new available slots.



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CCC® Shop Scheduling – Smart Appraiser Search: Staff/Drive-In, Continued

Drive-In Search Criteria

Drive-In facility search criteria:

- **Appraiser Type:** Required
- **Location Details:**
 - Address (optional)
 - City (optional)
 - State (optional)
 - Zip Code (required)
 - Radius (required)
- **Appointment Type** (not used)
- **Appointment Duration** (required)
- **Appointment Window** (not used)
- **Skills** (not used)

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

The screenshot shows the 'Smart Appraiser Search' interface. At the top, the 'Type' section has four radio buttons: 'Staff Appraiser', 'Repair Facility', 'Drive-in' (which is selected and highlighted with an orange box), and 'Independent Appraiser'. A 'Claim Reference Id: BH11111111' is displayed in the top right corner. Below this is the 'Location Details' section, which includes fields for 'Address' (000 Merchandise Mart, highlighted with an orange box), 'City' (Chicago), 'State' (Illinois), 'Zip Code*' (60000), and 'Radius (in miles)*' (25). There are 'Clear' and 'Search' buttons. Below the search criteria is a 'Repair Facility' section containing a table with the following data:

Name	Address/Phone	Rating	Description	Distance	Workload/Capacity	CCC ONE Indicator	Imaging	Advisor	Repair Workflow	Update Plus	Action
NEXT RF SHOP-01	000 Merchandise Mart CHICAGO, IL 60000 (123)000-0000			0.01	0 of 0 per Day	true	true	true	true	true	

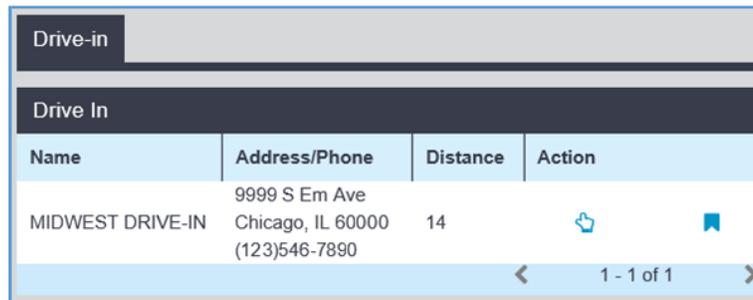
At the bottom right of the table, it says '1 - 1 of 1'.

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Drive-In Search Result

The below information are displayed in drive-in search results:

- **Name**
- **Address/Phone** – Drive-In’s location and contact number
- **Distance** from vehicle location
- **Action:**
 - **Select**  To send an assignment to a drive-in without booking an appointment.
 - **Book Appointment**  To book an appointment with the drive-in facility.

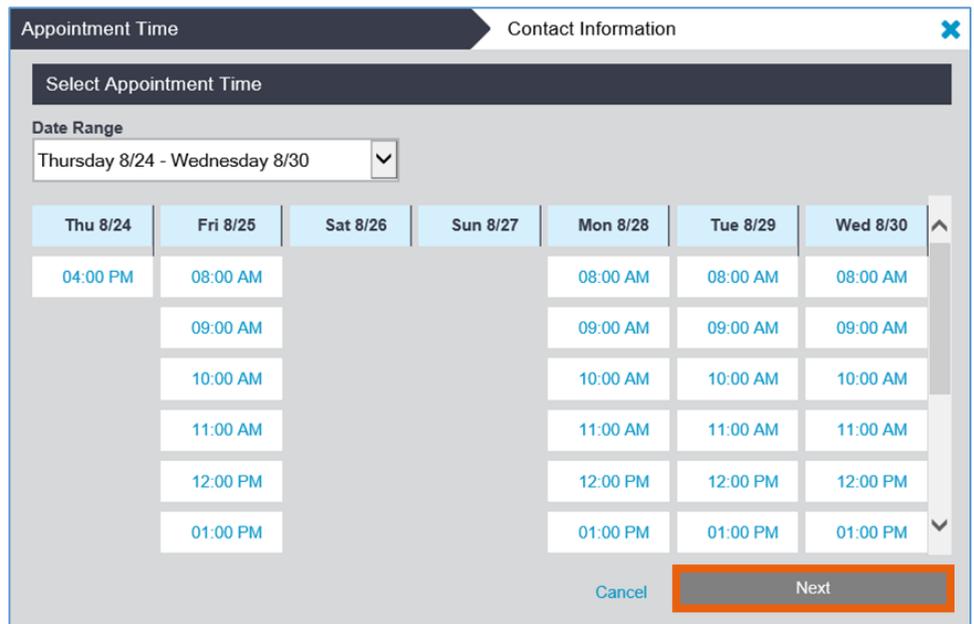


Name	Address/Phone	Distance	Action
MIDWEST DRIVE-IN	9999 S Em Ave Chicago, IL 60000 (123)546-7890	14	 

Get Drive-In Schedule and Book Appointment

The Drive-In schedule is retrieved weekly. Select the **Date Range** drop down to go to the drive-in schedule for different weeks. You can get the schedule from the current week up through one month.

The current day of the week schedule will be displayed with the following 6 days. Select a **time slot** and click **Next** to go to the appointment contact screen:



Thu 8/24	Fri 8/25	Sat 8/26	Sun 8/27	Mon 8/28	Tue 8/29	Wed 8/30
04:00 PM	08:00 AM			08:00 AM	08:00 AM	08:00 AM
	09:00 AM			09:00 AM	09:00 AM	09:00 AM
	10:00 AM			10:00 AM	10:00 AM	10:00 AM
	11:00 AM			11:00 AM	11:00 AM	11:00 AM
	12:00 PM			12:00 PM	12:00 PM	12:00 PM
	01:00 PM			01:00 PM	01:00 PM	01:00 PM

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CCC® Shop Scheduling – Smart Appraiser Search: Staff/Drive-In, Continued

Get Drive-In Schedule and Book

Appointment continued

On the appointment contact screen, the personal and vehicle information is 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)

The screenshot shows a software interface for entering appointment information. At the top, there are two tabs: 'Appointment Time' (highlighted in green) and 'Contact Information'. Below the tabs is a form titled 'Enter Personal Information' with a '* Required' indicator. The form contains four input fields: 'First Name*' with the value 'P', 'Last Name*' with the value 'Kim', 'Phone Number*' with the value '(111)111-1111', and 'Email' with the value 'email@hotmail.com'. Below these fields are radio buttons for 'Contact Preference' with options 'Text', 'Email' (selected), and 'None'. A checkbox is checked with the text 'I agree to receive communication on the preferred contact method for this appointment. Text and data rates may apply.' Below this is another section titled 'Enter Vehicle Information' with three dropdown menus: 'Year' (2013), 'Make' (Honda), and 'Model' (Accord Coupe EX Automa). At the bottom right of the form are two buttons: 'Cancel' and 'Book & Send Assignment' (highlighted in orange).

Once the required information are filled-in, the user can click the Book & Send Assignment button to book appointment and send the assignment to the drive-in.

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**Get Drive-In
schedule and
Book
Appointment**
continued

A success message with appointment time are displayed in assignment entry page once the appointment is booked.

