## **Maintain Audit Guidelines**

Introduction	CCC ONE <sup>TM</sup> Estimating - Advisor is a web-based audit solution for repair facilities. It provides an audit report within Pathways® Collision Estimating or CCC ONE <sup>TM</sup> Estimating for preliminary estimates / supplements before they are sent to the Insurance Company. This gives repair facility users the opportunity to review and update prior to sending the estimate to Insurance Company.			
	A repair facility can set up guidelines and profiles that are Insurance Company specific. A user can select guidelines to use for an audit report and the score value for the guidelines.			
Audit Guidelines	Audit Guidelines are used to evaluate a preliminary estimate or supplement prior to communicating it to the insurance company. A company can set rules at any level within their company hierarchy:			
	• <b>Corporate:</b> This value applies to all levels of the hierarchy.			
	• <b>Region:</b> This value applies to a specific Region and that Region's Locations.			
	• Location: This value applies to a specific location.			
	Maintain Audit Guidelines  View Audit Guidelines  Edit Audit Guidelines  Parts Code Table Utility			
	Audit Guidelines can also be set for an insurance company in the same manner. For example, a guideline set at the Corporate level for an insurance company applies to all levels of the hierarchy.			
	When setting Audit Guidelines, first set them at the Corporate Level. It is best to first identify all of the rules for the corporate level and / or insurance company. This ensures that all the lower levels inherit the corporate level rules and minimizes re-keying the same data at each level			
Note for Admins	Only one user for a company is allowed to Maintain Audit Guidelines at a time. If a second user attempts to log in to maintain profiles, while someone is already in progress, the second user receives an error message indicating the name of the user who is already logged in and maintaining profiles.			

 Maintain Audit
 The table below overviews the steps for maintaining Audit Guidelines within CCC ONE® Advisor.

Step	Action				
1	From the CCC Portal Home Page, click the Edit Audit Guidelines				
	CCC ONE				
	AdVisor Maintain Audit Guidelines View Audt Guidelines Gitt Audt Guidelines First Audt Guidelines Parts Code Table Utity Maintain Audt Profile Values				
	View Audt Profile Values  Edit Audt Profile Values  View Audt History  View Audt Rotes Evert History  View Audt Profile Steret History  View Audt Profile Steret History  View Audt Profile Steret History				
	View Usage Summary Report				
2	To Edit Audit Guidelines at the Corporate Level, click the Edit Audit Guidelines button.				
	Advisor Maintenance Maintain Audit Guidelines				
	Edit Audit Guidelines				
	▼ Select Corporate Level & Insurance Company				
	Corporate Level Company HONDA MSO				
	Insurance Company				
	Edit Audit Guidelines				

Maintain Audit		
Guidelines	Step	Action
(continued)	3	This opens the Edit Audit Guidelines page.
		Edit Audit Guidelines
		Select Corporate Level & Insurance Company      Fdit Audit Guideline Activation & Score
		Corporate Level HONDA MSO
		Insurance Company
		Audit Guidelines open all   close all
		<ul> <li>Additional Items</li> <li>Administration</li> <li>Best Practice</li> <li>Cycle Time</li> <li>Integrity</li> <li>Parts</li> <li>Rates</li> <li>Repair vs. Replace</li> </ul>
		Save Deactivate Guidelines for This Level Print cancel
	4	
	4	To open a category, click a specific link.
		Audit Guidelines         • Additional Items         • Administration         • Best Practice         • Cycle Time         • Integrity         • Parts         • Alternative Parts Usage (APU)         • Cost Effective Part Choice         • Domestic Part         • Foreign Part         • Glass         • Like, Kind, and Quality (LKQ)         • Rates         • Repair vs. Replace
		and then click the subcategory link to access the guidelines.

Sten	Action
5	The list of corresponding Guidelines displays:
	<ul> <li>Parts</li> <li>Alternative Parts Usage (APU)</li> <li>Cost Effective Part Choice</li> <li>Domestic Part</li> <li>Foreign Part</li> <li>Glass</li> </ul>
	Activate 6 Guideline / Audit Profile Values Activation Description Level
	T         Image: Significant Glass Part Stress
	▼ Glass Guideline / Audit Profile Values Activation Score
	Description         Level           Non-NAGS Glass         Significant Glass Part         \$0.00         0
	Used         Price (\$)         Cost           This guideline appears on an Audit report when the Glass part is a non-NAGS part. The actual is the part price of the glass part line item and the allowable is the Significant Glass Part Price Threshold from the Audit Profile.
	<b>Note:</b> To close the description, click the "X" box to the left of
7	To Activate a Guideline, click the check box under the Activate
	Step         5           5         6           7         7

Maintain Audit	Step	Action				
Guidelines (continued)	8	To set the score for the Guideline, use a value between $0 - 9999$ and enter it into the text box corresponding to the selected guideline.				
		Glass     Guideline /     Audit Profile Values     Activation       Description     Level     Score       Image: Straight of the str				
		Advisor Report, guidelines with the higher score value will be listed first. <b>Note:</b> It is recommended that if a guideline is not critical, but is active as a reminder, that you set the score value to zero or to a low number.				
	9	Click the Save button at the bottom of the page to save the changes.				

Guidelines for<br/>other levelsIf you are a part of an MSO, you may want to set Guidelines for a Regional or<br/>Location level.

To do this, you would select either a Region or a Location from the drop down list, prior to clicking the Edit Audit Guidelines button.

Edit Audit Guidelines			
▼ Select Corporate Level &	Insurance Co	ompany 🛛 🗏 Edit Audit Guideline	Activation & Score
Corporate Level Insurance Company Edit Audit Guidelines	Company Location	HONDA MSO FIT REPAIR FACILITY PASSPORT REPAIR FACILITY FIT REPAIR FACILITY ACCORD REPAIR FACILITY CIVIC REPAIR FACILITY ELEMENT REPAIR FACILITY	

You can now follow Steps 3 - 9 in the table above to set the Audit Guidelines for the Location:

}elect Corporate Level & Insurance Company → Edit Audit Guideline Activation & Score				
Corporate Level HONDA MSO > FIT REPAIR FACILITY				
Insurance Company				
dit Guidelines	open all   close a			
Additional Items				
Administration				
Best Practice				
Cycle Time				
Integrity				
▶ Parts				
Rates				
Repair vs. Replace				

Audit Guidelines for the Insurance Company To enter an Audit Guidelines for an Insurance Company, select an Insurance Company from the drop down list prior to clicking the Edit Audit Guidelines button.

Edit Audit Profiles			
▼ Select Corporate Level 8	a Insurance Compan	y 🕑 Edit Audit Profile Values	
Corporate Level Insurance Company	Company HOND/	MSO	
Edit Audit Profile Values	APPRAISER INSURANC	E COMPANY - INTERNAL TRAINING	

You can now follow Steps 3-9 in the table above to set the Audit Guidelines for the Insurance Company:

elect Corporate Level & Insurance Company 🗢 Edit Audit Guideline Activation & Score			
Corporate Level         HONDA MSO           Insurance Company         APPRAISER INSURANCE COMPANY - INTERNAL TRAINING			
Guidelines	open all   close all		
<ul> <li>Additional Items</li> <li>Administration</li> <li>Best Practice</li> </ul>			
<ul> <li>Cycle Time</li> <li>Insurance Company</li> <li>Integrity</li> </ul>			