

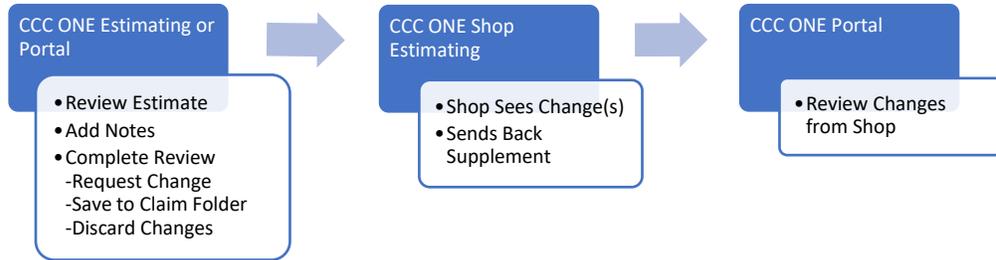
# Using Estimate Review in CCC ONE® Estimating

## Overview

This job aid describes how to review shop-written estimates and supplements and how to request changes using CCC ONE® Estimating.

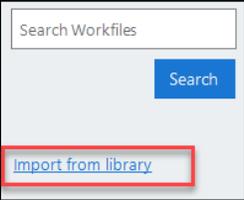
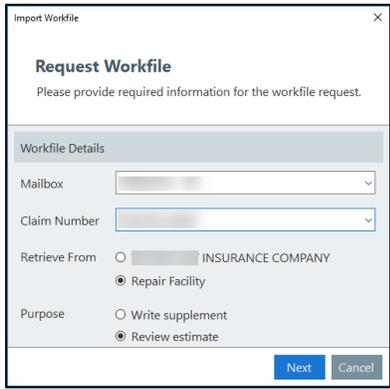
## Process Review

Please review the following process map for a high-level understanding of the steps required to review estimates and request changes.



## Step 1: Retrieve Estimate

After a shop completes and communicates an estimate, use the library retrieval process to locate it.

Step	Action
1	 <p>Click the <b>Import from library</b> link.</p>
2	 <p>In the Import Workfile popup, select the <b>Mailbox</b> if multiple mailboxes are available, enter the <b>Claim Number</b>, select <b>Repair Facility</b> in the <b>Retrieve From</b> field, and select <b>Review estimate</b> in the <b>Purpose</b> field.</p>
3	Click the <b>Next</b> button.

*Continued on next page*

## Using Estimate Review in CCC ONE® Estimating, Continued

**Retrieve Estimate,**  
continued

Step	Action
4	A request confirmation message appears. Click the <b>Finish</b> button to dismiss the popup.
5	Once the file is retrieved, it appears among your Workfiles. It is identified in the Source column as a Library Copy. Double-click the workfile to open it.

**Step 2:**  
**Create Supplement**

When the workfile opens, perform these steps to request changes.

Step	Action
1	Navigate to the <b>Estimate</b> tab and click the <b>Create Supplement</b> button. A confirmation popup opens.

Step	Action
2	Click the <b>Yes</b> button in the confirmation popup.

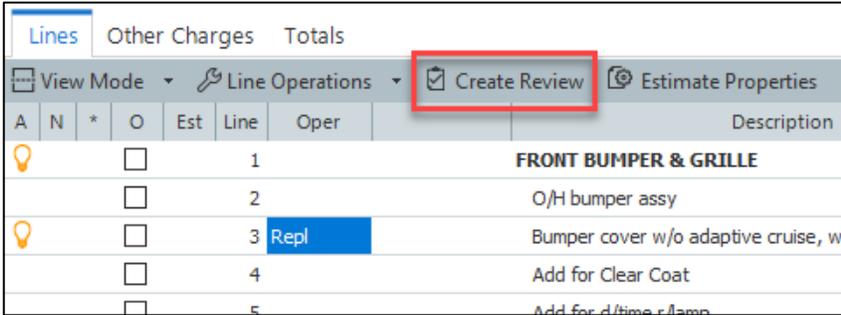
CCC ONE

Are you sure you want to create this Supplement?

*Continued on next page*

## Using Estimate Review in CCC ONE® Estimating, Continued

**Create Supplement,**  
continued

Step	Action
3	Make any necessary changes to the estimate information, e.g. add lines, delete lines, etc.
4	<p>When finished, click <b>Create Review</b>.</p> <p><b>Note:</b> This may be located under <b>Lock &gt; Create Review</b>. You are now ready to perform the Estimate Review.</p> 

*Continued on next page*

## Using Estimate Review in CCC ONE® Estimating, Continued

### Workfile Tabs: Reviewing Changes

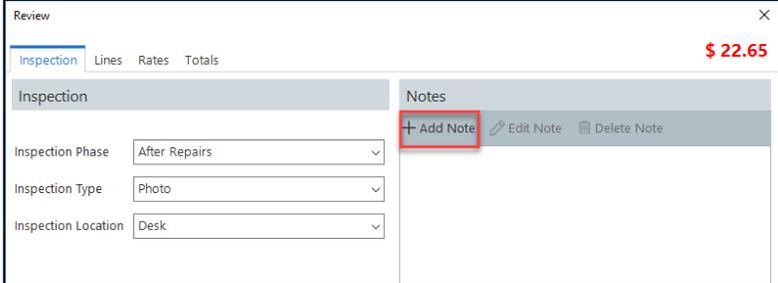
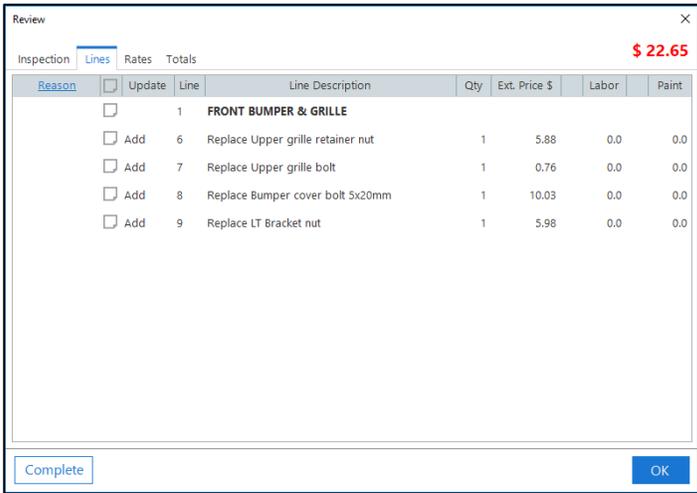
To write your review, you must look at the information on the Inspection, Lines, Rates, and Totals tabs. This section of the job aid details the information and options available under each tab.

Tab	Description																																	
Inspection	<p>The Inspection tab contains two sections: Inspection and Notes. The Inspection section contains three fields: <b>Inspection Phase</b> (when the review was performed), <b>Inspection Type</b> (how the review was performed), and <b>Inspection Location</b> (where the review was performed). Available values for each field include:</p> <table border="1" data-bbox="646 1251 1414 1602"> <thead> <tr> <th data-bbox="646 1251 889 1283">Inspection Phase</th> <th data-bbox="898 1251 1133 1283">Inspection Type</th> <th data-bbox="1141 1251 1414 1283">Inspection Location</th> </tr> </thead> <tbody> <tr> <td data-bbox="646 1293 889 1325">Before Repairs</td> <td data-bbox="898 1293 1133 1325">Physical</td> <td data-bbox="1141 1293 1414 1325">Drive-in</td> </tr> <tr> <td data-bbox="646 1335 889 1367">During Repairs</td> <td data-bbox="898 1335 1133 1367">Photo</td> <td data-bbox="1141 1335 1414 1367">Home</td> </tr> <tr> <td data-bbox="646 1377 889 1409">After Repairs</td> <td data-bbox="898 1377 1133 1409">Video</td> <td data-bbox="1141 1377 1414 1409">Non Drive-in</td> </tr> <tr> <td data-bbox="646 1419 889 1451">Total Loss</td> <td data-bbox="898 1419 1133 1451"></td> <td data-bbox="1141 1419 1414 1451">Other</td> </tr> <tr> <td data-bbox="646 1461 889 1493"></td> <td data-bbox="898 1461 1133 1493"></td> <td data-bbox="1141 1461 1414 1493">Repair Facility</td> </tr> <tr> <td data-bbox="646 1503 889 1535"></td> <td data-bbox="898 1503 1133 1535"></td> <td data-bbox="1141 1503 1414 1535">Work</td> </tr> <tr> <td data-bbox="646 1545 889 1577"></td> <td data-bbox="898 1545 1133 1577"></td> <td data-bbox="1141 1545 1414 1577">Virtual</td> </tr> <tr> <td data-bbox="646 1587 889 1619"></td> <td data-bbox="898 1587 1133 1619"></td> <td data-bbox="1141 1587 1414 1619">Field</td> </tr> <tr> <td data-bbox="646 1629 889 1661"></td> <td data-bbox="898 1629 1133 1661"></td> <td data-bbox="1141 1629 1414 1661">Desk</td> </tr> <tr> <td data-bbox="646 1671 889 1703"></td> <td data-bbox="898 1671 1133 1703"></td> <td data-bbox="1141 1671 1414 1703">Salvage</td> </tr> </tbody> </table>	Inspection Phase	Inspection Type	Inspection Location	Before Repairs	Physical	Drive-in	During Repairs	Photo	Home	After Repairs	Video	Non Drive-in	Total Loss		Other			Repair Facility			Work			Virtual			Field			Desk			Salvage
Inspection Phase	Inspection Type	Inspection Location																																
Before Repairs	Physical	Drive-in																																
During Repairs	Photo	Home																																
After Repairs	Video	Non Drive-in																																
Total Loss		Other																																
		Repair Facility																																
		Work																																
		Virtual																																
		Field																																
		Desk																																
		Salvage																																

Continued on next page

# Using Estimate Review in CCC ONE® Estimating, Continued

**Workfile  
Tabs:  
Reviewing  
Changes,  
continued**

Tab	Description																																																
Inspection, cont.	<p>The Notes section is also available under the Inspection tab. Click the <b>Add Note</b> button to add a general note of explanation.</p>  <p><b>Note:</b> The note you add here should be general in nature, and the information contained in it should not impact estimate dollars. See the next section of this job aid for details regarding how to enter a note for entries on the Lines, Rates, and Totals tabs.</p>																																																
Lines	<p>The Lines tab lists all changes made to estimate lines, e.g. added lines, updated lines (changes to part prices, labor hours, etc.), and removed lines.</p>  <table border="1" data-bbox="656 1188 1336 1556"> <thead> <tr> <th>Reason</th> <th>Update</th> <th>Line</th> <th>Line Description</th> <th>Qty</th> <th>Ext. Price \$</th> <th>Labor</th> <th>Paint</th> </tr> </thead> <tbody> <tr> <td></td> <td><input type="checkbox"/></td> <td>1</td> <td><b>FRONT BUMPER &amp; GRILLE</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Add 6</td> <td>Replace Upper grille retainer nut</td> <td>1</td> <td>5.88</td> <td>0.0</td> <td>0.0</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Add 7</td> <td>Replace Upper grille bolt</td> <td>1</td> <td>0.76</td> <td>0.0</td> <td>0.0</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Add 8</td> <td>Replace Bumper cover bolt 5x20mm</td> <td>1</td> <td>10.03</td> <td>0.0</td> <td>0.0</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Add 9</td> <td>Replace LT Bracket nut</td> <td>1</td> <td>5.98</td> <td>0.0</td> <td>0.0</td> </tr> </tbody> </table>	Reason	Update	Line	Line Description	Qty	Ext. Price \$	Labor	Paint		<input type="checkbox"/>	1	<b>FRONT BUMPER &amp; GRILLE</b>						<input type="checkbox"/>	Add 6	Replace Upper grille retainer nut	1	5.88	0.0	0.0		<input type="checkbox"/>	Add 7	Replace Upper grille bolt	1	0.76	0.0	0.0		<input type="checkbox"/>	Add 8	Replace Bumper cover bolt 5x20mm	1	10.03	0.0	0.0		<input type="checkbox"/>	Add 9	Replace LT Bracket nut	1	5.98	0.0	0.0
Reason	Update	Line	Line Description	Qty	Ext. Price \$	Labor	Paint																																										
	<input type="checkbox"/>	1	<b>FRONT BUMPER &amp; GRILLE</b>																																														
	<input type="checkbox"/>	Add 6	Replace Upper grille retainer nut	1	5.88	0.0	0.0																																										
	<input type="checkbox"/>	Add 7	Replace Upper grille bolt	1	0.76	0.0	0.0																																										
	<input type="checkbox"/>	Add 8	Replace Bumper cover bolt 5x20mm	1	10.03	0.0	0.0																																										
	<input type="checkbox"/>	Add 9	Replace LT Bracket nut	1	5.98	0.0	0.0																																										

*Continued on next page*

## Using Estimate Review in CCC ONE® Estimating, Continued

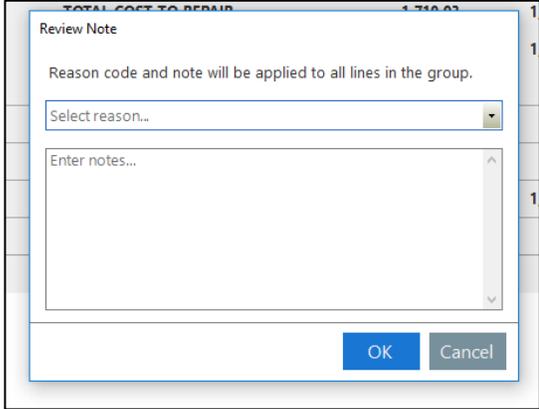
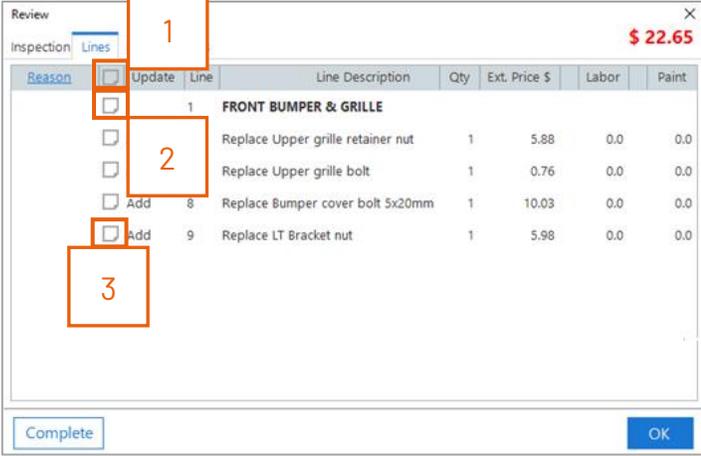
**Workfile  
Tabs:  
Reviewing  
Changes,  
continued**

Tab	Description																																																						
Rates	The Rates tab lists any changes made to the rates used for the estimate.																																																						
Totals	<p>The Totals tab outlines the dollar impact of the changes made.</p> <div data-bbox="662 531 1414 1056" style="border: 1px solid black; padding: 5px;"> <p>Review <span style="float: right;">\$ 22.65</span></p> <p>Inspection Lines Rates <b>Totals</b></p> <table border="1"> <thead> <tr> <th>Reason</th> <th>Update</th> <th>Category</th> <th>Estimate \$</th> <th>Review \$</th> <th>Difference \$</th> </tr> </thead> <tbody> <tr> <td></td> <td><input type="checkbox"/></td> <td>TOTAL COST TO REPAIR</td> <td>1,710.93</td> <td>1,733.58</td> <td>22.65 ▲</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Insurance Pay</td> <td>1,710.93</td> <td>1,733.58</td> <td>22.65 ▲</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Customer Pay</td> <td>-</td> <td>-</td> <td>-</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Labor</td> <td>-</td> <td>-</td> <td>-</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Materials</td> <td>-</td> <td>-</td> <td>-</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Parts</td> <td>1,413.96</td> <td>1,436.61</td> <td>22.65 ▲</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Miscellaneous</td> <td>-</td> <td>-</td> <td>-</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Taxes</td> <td>-</td> <td>-</td> <td>-</td> </tr> </tbody> </table> <p>Complete <span style="float: right;">OK</span></p> </div> <p>Click the + icon in the left column to reveal details about a line.</p> <p>A red triangle in the far right column indicates an increased cost for the carrier; a green triangle indicates a decreased cost.</p>	Reason	Update	Category	Estimate \$	Review \$	Difference \$		<input type="checkbox"/>	TOTAL COST TO REPAIR	1,710.93	1,733.58	22.65 ▲		<input type="checkbox"/>	Insurance Pay	1,710.93	1,733.58	22.65 ▲		<input type="checkbox"/>	Customer Pay	-	-	-		<input type="checkbox"/>	Labor	-	-	-		<input type="checkbox"/>	Materials	-	-	-		<input type="checkbox"/>	Parts	1,413.96	1,436.61	22.65 ▲		<input type="checkbox"/>	Miscellaneous	-	-	-		<input type="checkbox"/>	Taxes	-	-	-
Reason	Update	Category	Estimate \$	Review \$	Difference \$																																																		
	<input type="checkbox"/>	TOTAL COST TO REPAIR	1,710.93	1,733.58	22.65 ▲																																																		
	<input type="checkbox"/>	Insurance Pay	1,710.93	1,733.58	22.65 ▲																																																		
	<input type="checkbox"/>	Customer Pay	-	-	-																																																		
	<input type="checkbox"/>	Labor	-	-	-																																																		
	<input type="checkbox"/>	Materials	-	-	-																																																		
	<input type="checkbox"/>	Parts	1,413.96	1,436.61	22.65 ▲																																																		
	<input type="checkbox"/>	Miscellaneous	-	-	-																																																		
	<input type="checkbox"/>	Taxes	-	-	-																																																		

*Continued on next page*

## Using Estimate Review in CCC ONE® Estimating, Continued

**Step 3: Review Changes** Follow the steps below to enter notes under each tab.

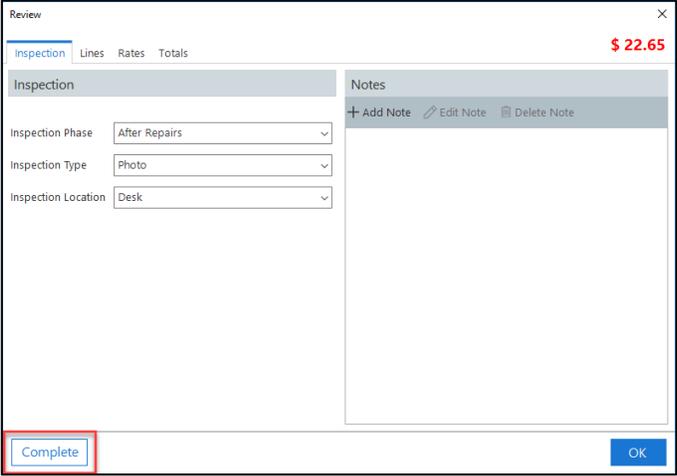
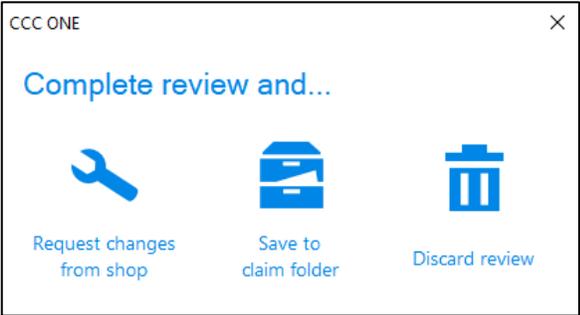
Step	Action								
1	<p>Double-click on an entry under any tab and the <b>Review Note</b> popup appears.</p> <p>You can also click the <b>Add Note</b> button in the toolbar to activate the popup.</p> 								
2	<p>Select a <b>Reason Code</b> from the dropdown menu, enter a <b>note</b> in the provided field, and then click the <b>OK</b> button.</p> <p>Click the note icon to apply a reason code to the following areas:</p> <table border="1" data-bbox="386 1121 704 1518"> <thead> <tr> <th>Part</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Apply Reason Code to <b>All</b> lines.</td> </tr> <tr> <td>2</td> <td>Apply Reason Code to <b>Group</b> level lines.</td> </tr> <tr> <td>3</td> <td>Apply Reason Code to a <b>Single</b> line.</td> </tr> </tbody> </table>  <p><b>Note:</b> A note icon and the note text appear under the corresponding line. Add notes under the other tabs as needed. Based on carrier configurations reason codes may be required for Staff and Shop written estimates.</p>	Part	Description	1	Apply Reason Code to <b>All</b> lines.	2	Apply Reason Code to <b>Group</b> level lines.	3	Apply Reason Code to a <b>Single</b> line.
Part	Description								
1	Apply Reason Code to <b>All</b> lines.								
2	Apply Reason Code to <b>Group</b> level lines.								
3	Apply Reason Code to a <b>Single</b> line.								

*Continued on next page*

## Using Estimate Review in CCC ONE® Estimating, Continued

### Step 4: Complete Review

Once you finish making changes, follow the steps below to complete the review.

Step	Action
1	<p>Click the <b>Complete</b> button in the lower left corner.</p> 
2	<p>The <b>Complete review and ...</b> popup opens.</p>  <p>Choose from the following options (see following pages for details):</p> <ul style="list-style-type: none"> <li>• Request changes from shop</li> <li>• Save to claim folder</li> <li>• Discard review</li> </ul>

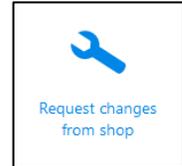
*Continued on next page*

## Using Estimate Review in CCC ONE® Estimating, Continued

---

### Request Changes from Shop

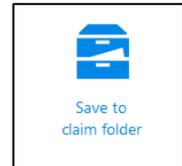
If the review warrants a request to the shop for changes, click the **Request changes from shop** option. These updates are made:



- Estimate Review Report created
- Reinspection Status updated to "Report Complete"
- Supplement Request Status updated to "Requested"
- Estimate/Supplement Print Image Status updated to "Declined"
- DREST (Reinspector has reviewed the estimate in CCC ONE Estimating) business event is generated
- RERCR (Reinspection Report Complete) business event is generated
- RREPS (Reinspection Report has been shared with appraiser) business event is generated
- RT Transaction will be generated (for reporting)
- The workfile is removed/deleted from the unit
- Reinspection data (Change Request) is sent to the shop via the RF Server

### Save to Claim Folder

If you do not need the shop to make changes but want to store the data in the claim folder, click the **Save to claim folder** option. These updates are made:



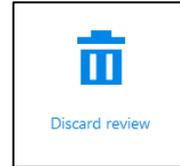
- Estimate Review Report created
- Reinspection Status updated to "Complete"
- Supplement Request Flag updated to "Not Requested"
- Estimate/Supplement Print Image Status updated to "Accepted"
- DREST (Reinspector has reviewed the estimate in CCC ONE Estimating) business event is generated
- RECOM (Reinspection Complete) business event is generated
- RT Transaction will be generated (for reporting)
- The workfile is removed/deleted from the unit
- Reinspection data is **not** shared with the shop

*Continued on next page*

## Using Estimate Review in CCC ONE® Estimating, Continued

### Discard Review

Click the **Discard review** option to delete your changes; a review will not be created.



### What's Included in the Change Request

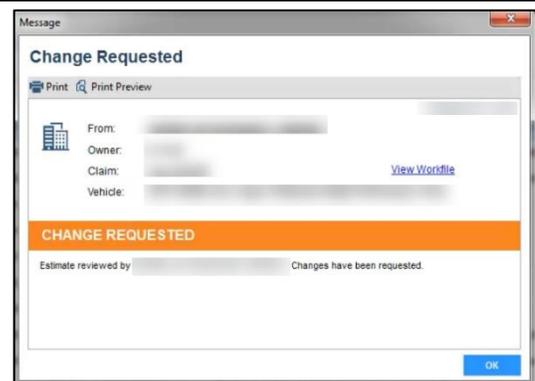
Only the following items will be included in the Change Request that is generated for the shop:

- Estimate Lines
- Adjustments (Deductible, Betterment, Appearance Allowance)
- Other Charges
- Estimate Totals
- Estimate Rates
- Notes
- Changes made to the Vehicle Options

**Note:** No changes made under the Contacts tab are communicated to the shop, and no changes made under the Insurance tab—aside from those made to the deductible—are communicated.

### What the Shop Sees

The shop receives a “Change Requested” message. The message appears in the message/notification section of the shop’s CCC ONE unit.



*Continued on next page*

## Using Estimate Review in CCC ONE® Estimating, Continued

### What the Shop Sees, continued

When the shop opens the workfile, an orange callout in the lower right corner of the screen indicates a “Click here to view change request from (Insurance Carrier)”.

The user clicks the link button to open the **Change Request** popup.



The Lines, Rates, Totals, and Notes tabs are available for review. After reviewing these tabs, the user can elect to:

- **Accept Changes and Lock:** This creates the supplement based on the communicated changes. The supplement is locked and communicated. The shop does not have the opportunity to make any changes.
- **Accept Changes and Edit:** This creates the supplement based on the communicated changes. The shop has the opportunity to make any changes prior to locking.
- **Reject Changes and Edit Estimate:** The Change Request form closes for the shop to write their own Supplement.
- **Cancel:** This closes the Insurance Change Request page. The Change Request is still available, and the user can return to it later.

