

Estimate Review for Staff Written Estimates Scenario 2: Create Review and Lock Supplement (Library Master)

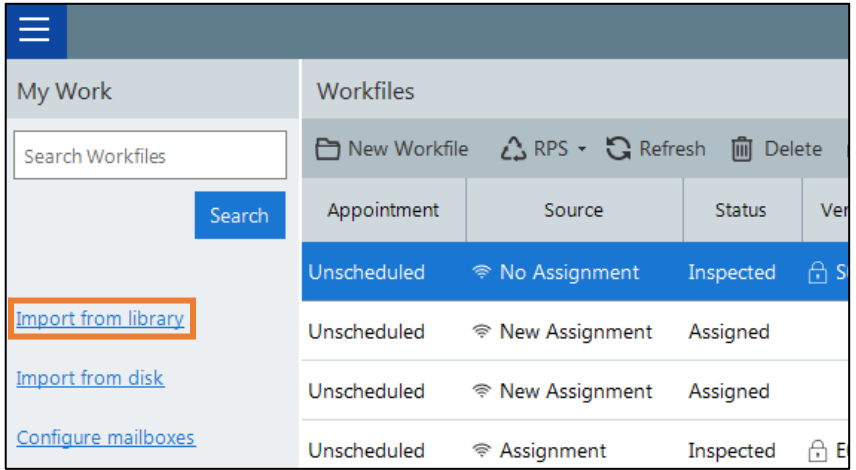
Overview

Unlike RF Reviews, a reviewer does not request changes to the Workfile. Instead, you can create a Supplement for the Workfile and/or write the Estimate Review Report.

This job aid details how to create a Review and Supplement in CCC ONE® Insurance Estimating on a Staff-written Estimate. For more information on how to create an Estimate Review on an RF-written estimate, please consult the appropriate job aid.

Create Estimate Review & Lock Supplement (Library Master)

First, request a Library Master of the Workfile. Retrieving a Master permits you to create a Review and/or Supplement with your changes that can be uploaded.

Step	Action
1	<div><p>Select Import from library in CCC ONE's left- side panel.</p><p>The Import Workfile popup opens.</p></div>

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Create Estimate Review & Lock Supplement (Library Master), continued

Step	Action
2	<div><p>Enter the Claim Number, select the Insurance Company radio button in the Retrieve From field, and select the Write supplement radio button in the Purpose field.</p><p>Note: Selecting Write supplement requests a Library Master of the Workfile.</p><div><div>Import Workfile</div><div><div>Request Workfile</div><div>Please provide required information for the workfile request.</div><div><div>Workfile Details</div><div><div>Claim Number</div><div></div></div><div><div>Retrieve From</div><div><div><input checked="" type="radio"/> <div>INSURANCE</div></div><div><input type="radio"/> Repair Facility</div></div></div><div><div>Purpose</div><div><div><input type="radio"/> Write supplement</div><div><input checked="" type="radio"/> Review estimate</div></div></div></div><div><div>Next</div><div>Cancel</div></div></div></div></div>

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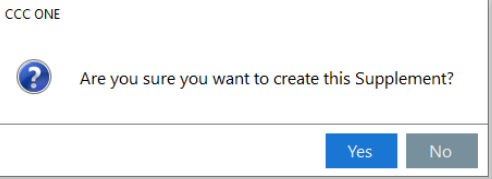
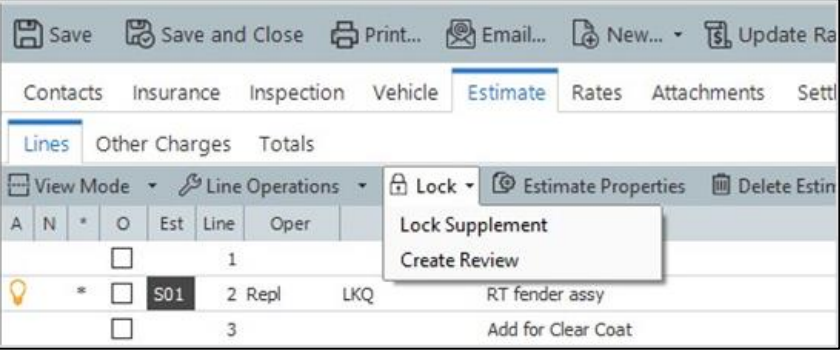
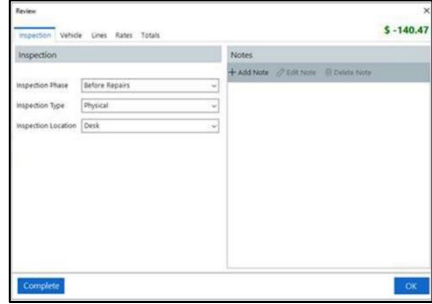
Create
Estimate
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(Library
Master),
continued,

Step	Action
3	Select the Next button. A confirmation message appears in the Import Workfile popup: "Request for workfile has been submitted. A notification will be generated when the workfile is received in the Inbox."
4	Select the Finish button in the Import Workfile popup to dismiss it.
5	<p>Once the Library Master copy of the Workfile is retrieved, select the claim in the Workfiles worklist.</p> <p>Note: This icon () in the Source column indicates that Workfile changes can be communicated.</p> <p>The Workfile opens.</p>
6	Navigate to the Estimate tab.
7	<p>Select the Create Supplement button.</p>

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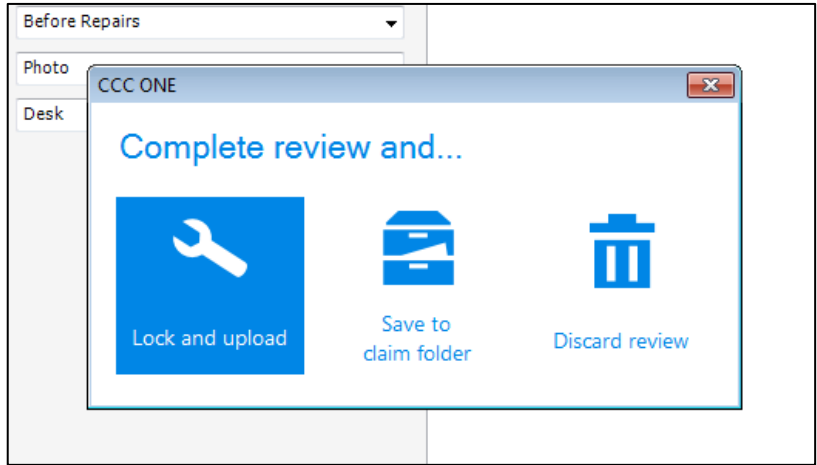
Create Estimate Review & Lock Supplement (Library Master), continued

Step	Action
8	 <p>Select Yes in the popup window.</p>
9	 <p>After making changes, select Lock > Create Review.</p>
10	<p>The Review popup opens. Complete the Inspection fields by selecting the appropriate values from the dropdown menus.</p> 
11	Select the Complete button in the lower left corner.

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Estimate Review for Staff Written Estimates Scenario 2: Create Review and Lock Supplement (Library Master), Continued


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Step	Action
12	<p>Select Lock and upload in the popup window. (Selecting Discard review will delete the review and delete the Workfile from your unit.)</p> 

**Workfile
Communicated**

This scenario creates the following (these are available under the Documents tab in the Claim Folder in the Portal):

- Supplement
- Estimate Review Report
- Estimate Review Compare Report

Claim Folder: [redacted] 

Summary Documents (6) Images (0) Notes History

Documents						
<input type="checkbox"/>	Date ▼	Document	Amount	Est/Supp	Submitted By	Status
<input type="checkbox"/>	09/27/2017 2:18 PM CST	Estimate Review Report	\$1022.88	E01	[redacted]	Submitted
<input type="checkbox"/>	09/27/2017 2:09 PM CST	Total vs. Repair Comparison Report			[redacted]	Submitted
<input type="checkbox"/>	09/27/2017 2:09 PM CST	Estimate 01	\$1018.15	E01	[redacted]	Accepted
<input type="checkbox"/>	09/27/2017 2:09 PM CST	Claim Summary Report			[redacted]	Submitted
<input type="checkbox"/>	09/27/2017 2:09 PM CST	Audit Report	339	E01	[redacted]	Submitted