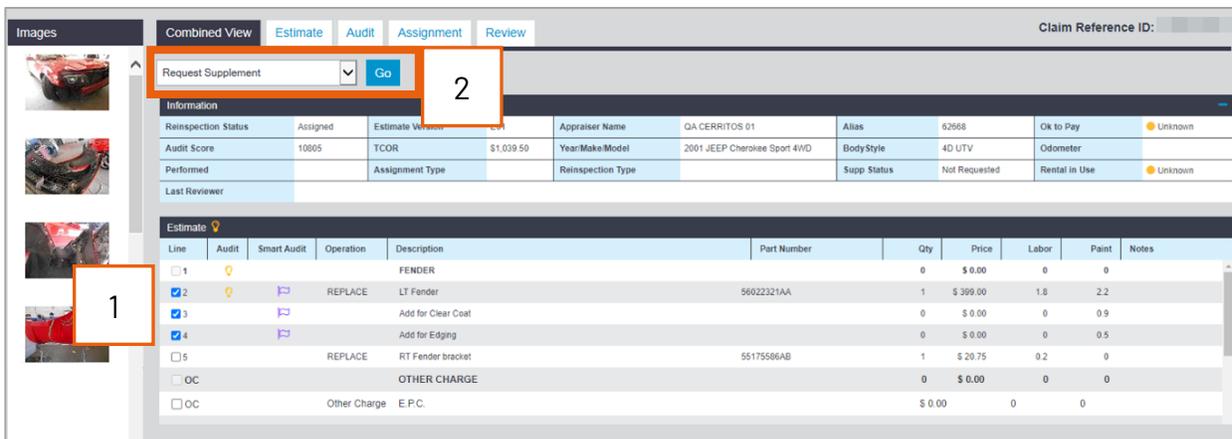


Using Estimate Review Line Level on CCC® Portal

Overview CCC® Estimate Review allows you to review Estimate lines, identify requested changes, create a Reinspection Report, and request a Supplement with those changes.

This job aid describes how to perform a Line Level Review of an Estimate after it's been assigned to you. The job aid also provides information about Smart Audit line-level reason codes and recommendations that can be leveraged to accelerate the reinspection process.

Perform Review We begin with the claim already opened to the Combined View tab in Estimate Review (click the **Estimate Review** link in the Claim Folder's left side panel). You have determined that a closer line level review is required for this Estimate.



Follow these steps to perform the Line Level Review.

Step	Action
1	Use the checkboxes by the Estimate lines to select lines for review.
2	Make sure the Request Supplement value is selected and click the Go button. The Request Supplement window opens with the lines you selected for review.

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Using Estimate Review Line Level on CCC® Portal, Continued

Perform Review, continued

Combined View:

This section provides detailed information from the Assignment, such as Reinspection Status, Estimate Version, Appraiser Name, Audit Score, TCOR for the latest estimate/ supplement, and more.

Images:

Thumbnails of photos included in the Assignment, which can be enlarged with one click. Drop Down options.

Information:

Includes details captured through the Assignment

Estimate: This section displays line-level view of the latest estimate/ supplement line items.

- **Line:** line number from the estimate/ supplement.
- **Audit:** light bulb signifies rule triggered for line item based on insurer-specific rules.
- **Smart Audit:** flag signifies line item recommended for review by Smart Audit.
- **Operation:** this is the current operation for the line item. Typically, you will see REPLACE, REPAIR, Other Charge, etc.
- **Description:** this is the description for the line.
- **Part Number:** this is the part number for the part on this line item (if available).
- **Qty:** this is the quantity for the part on this line.
- **Price:** this is the part price **Note:** the part price will reflect the overall part price for the line, and takes into account if there are multiple quantities.
- **Labor:** this indicates the labor hours for the line item.
- **Paint:** this is the labor hours for paint on the line item.

Line	Audit	Smart Audit	Operation	Description	Part Number	Qty	Price	Labor	Paint	Notes
1				FENDER		0	\$ 0.00	0	0	
2	Lightbulb		REPLACE	LT Fender	5602Z321AA	1	\$ 309.00	1.8	2.2	
3				Add for Clear Coat		0	\$ 0.00	0	0.9	
4				Add for Edging		0	\$ 0.00	0	0.5	
5			REPLACE	RT Fender bracket	55175586AB	1	\$ 20.75	0.2	0	
OC				OTHER CHARGE		0	\$ 0.00	0	0	
OC				Other Charge E.P.C.			\$ 0.00	0	0	

Note: A lightbulb icon in the Estimate section header indicates that there are audit rules that have been triggered that are not at the line level. Select the icon to display these General Audit Rules.

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Using Estimate Review Line Level on CCC® Portal, Continued

Perform Review, continued

Audit and Smart Audit line-level icons:

The Audit details will be displayed when the user selects the yellow lightbulb next to the line number. The Smart Audit details will be displayed when the user selects the purple flag next to the line number. The details may include the Smart Audit recommended reason code and changes, when available. The following details will be displayed:

Estimate 											
Line	Audit	Smart Audit	Operation	Description	Part Number	Qty	Price	Labor	Paint	Notes	
<input type="checkbox"/> 1				FENDER		0	\$ 0.00	0	0		
<input checked="" type="checkbox"/> 2			Replace	LT Fender	60261SWAA91ZZ	1	\$ 290.38	0.4	1.8		
<input checked="" type="checkbox"/> 3				FRONT BUMPER		0	\$ 0.00	0	0		
<input checked="" type="checkbox"/> 4			Repair	O/H front bumper		0	\$ 0.00	1.9	0		
<input type="checkbox"/> 5			Repair	Bumper cover upper	DPC000150PMA	1	\$ 750.00	3.5	0		
			Repair	<i>Labor Hour Overwrite (Recommended Reason Code)</i>					1.5		
Rule Description					Actual	Rule	Variance	Score			
 More cost-effective ARO part found					469.00	125.00	158	20			
 Non-DRP - Part price is greater than \$100					469.00	100.00	369	1			
<input checked="" type="checkbox"/> 6				Bumper cover lower	FB110227	1	\$ 290.45	0.4	1.8		
<input type="checkbox"/> 7				HOOD		0	\$ 0.00	0	0		
<input checked="" type="checkbox"/> 8			Replace	Hood		1	\$ 659.42	0.4	1.8		

Note: The **Upload Images** link is only displayed if the logged in user has the appropriate role.

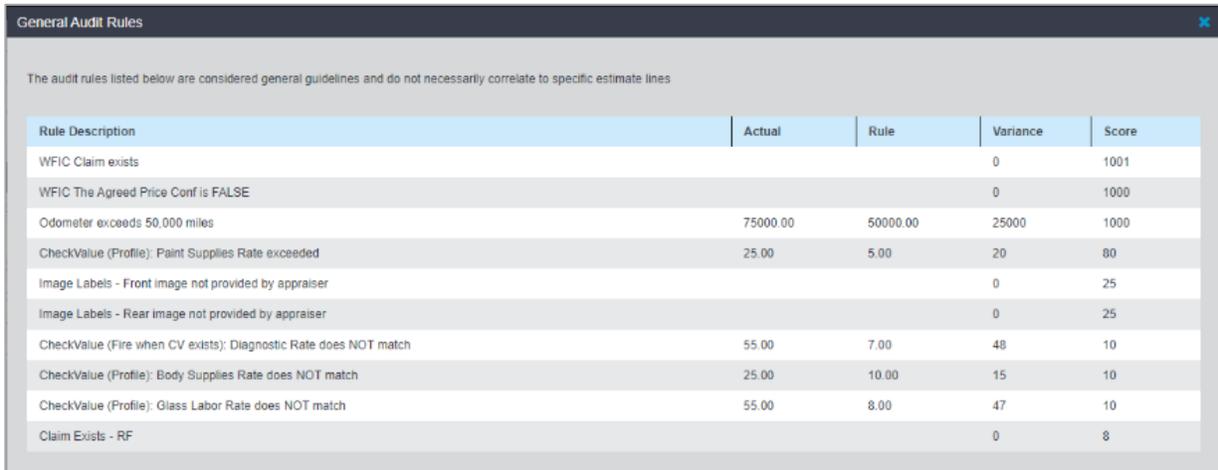
Continued on next page

Using Estimate Review Line Level on CCC® Portal, Continued

Perform Review, continued

General Audit Rules:

The generic audit rules display when the lightbulb icon in the Estimate section header is clicked. The General Audit Rules window provides all the general (not line specific) audit rules that were triggered for the latest estimate or supplement. **Note:** The rules displayed below are an example only.



The audit rules listed below are considered general guidelines and do not necessarily correlate to specific estimate lines

Rule Description	Actual	Rule	Variance	Score
WFIC Claim exists			0	1001
WFIC The Agreed Price Conf is FALSE			0	1000
Odometer exceeds 50,000 miles	75000.00	50000.00	25000	1000
CheckValue (Profile): Paint Supplies Rate exceeded	25.00	5.00	20	80
Image Labels - Front image not provided by appraiser			0	25
Image Labels - Rear image not provided by appraiser			0	25
CheckValue (Fire when CV exists): Diagnostic Rate does NOT match	55.00	7.00	48	10
CheckValue (Profile): Body Supplies Rate does NOT match	25.00	10.00	15	10
CheckValue (Profile): Glass Labor Rate does NOT match	55.00	8.00	47	10
Claim Exists - RF			0	8

- **Rule Description:** Displays the audit rule description.
- **Actual:** Displays the line item value from the line item that was used to trigger the rule.
- **Rule:** Displays the threshold value from the rule.
- **Variance:** The difference between the actual value and the rule value
- **Score:** Displays the score value associated to the rule.

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Using Estimate Review Line Level on CCC® Portal, Continued

Perform Review, continued

Estimate Review

Reinspection Details

3

Reinspection Type *
Photo

Location Type
Desk

Location Name

Performed *
Before Repair

Classifications
Verifying

Overall Rating
Excellent

Agreement Reached
 Yes
 No

Discussed With:

Required fields: Reinspection Type and Performed.

Request Supplement

Line Description Reason * Changes

Step	Action														
3	The Estimate Review popup opens. Complete the Reinspection Details fields as needed.														
	<table border="1"> <thead> <tr> <th>Field</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Reinspection Type*</td> <td>A required field that indicates how the reinspection occurred. Selectable values are: Photo (default), Video, and Physical. Photo and Video reinspections take place at the desk while Physical reinspections happen in the field.</td> </tr> <tr> <td>Performed*</td> <td>A required field that indicates when the reinspection occurred. Selectable values are: Before Repair, During Repair, After Repair, and Total Loss.</td> </tr> <tr> <td>Location Type</td> <td>This field indicates where the reinspection occurred. Selectable values are: Desk (default), Drive-In, Field, Home, Non Drive-In, Other, Repair Facility, Salvage Yard, Virtual, and Work.</td> </tr> <tr> <td>Classifications</td> <td>This field allows the user to determine why the review is being performed. Values can vary by Carrier.</td> </tr> <tr> <td>Location Name</td> <td>The user can manually enter a name for the review location (100-character limit).</td> </tr> <tr> <td>Overall Rating</td> <td>This field allows the user to select an overall review rating. Values can vary by Carrier.</td> </tr> </tbody> </table>	Field	Description	Reinspection Type*	A required field that indicates how the reinspection occurred. Selectable values are: Photo (default), Video, and Physical. Photo and Video reinspections take place at the desk while Physical reinspections happen in the field.	Performed*	A required field that indicates when the reinspection occurred. Selectable values are: Before Repair, During Repair, After Repair, and Total Loss.	Location Type	This field indicates where the reinspection occurred. Selectable values are: Desk (default), Drive-In, Field, Home, Non Drive-In, Other, Repair Facility, Salvage Yard, Virtual, and Work.	Classifications	This field allows the user to determine why the review is being performed. Values can vary by Carrier.	Location Name	The user can manually enter a name for the review location (100-character limit).	Overall Rating	This field allows the user to select an overall review rating. Values can vary by Carrier.
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Using Estimate Review Line Level on CCC® Portal, Continued

Perform Review, continued

As you can see below, you are provided a Reason field and a Changes field for each selected Estimate line. There are also fields for the Price Amounts, Labor Hours, and Paint Hours.

The screenshot shows a 'Request Supplement' form with the following fields and buttons:

- Line 1:** Description: Fender; Reason: Labor OW; Changes: Please enter comments... (Callout 4)
- Price Amount:** Current: \$ 612.28; New: \$ 612.28 (Callout 5)
- Labor Hours:** Current: 3.5; New: 1.5; Difference: 2.0 (Callout 5)
- Paint Hours:** Current: 2.5; New: 2.5; Difference: 0 (Callout 5)
- Buttons:** Add Additional Reason (Callout 4), Undo Changes (Callout 6), Delete Estimate Line, Remove From Review
- Footer:** Reason Code | Labor OW; Hours | null hrs

Step	Action
4	For each selected line, you can select up to three Reason codes. After the first code, use the Add Additional Reason button to add more reasons. Example Reason: Labor OW. Example Comment: Labor Hours modified from 17 to 16 hours.
5	Enter the New Price Amount or Labor or Paint Hours . The Difference will auto-calculate as you enter the information. The Difference is the amount difference between the Current amount and the New amount.
6	Click Undo Changes to remove the reason code.

Note: If available, a purple flag will indicate the Smart Audit flagged line item, and the recommended Reason Code and New Labor Hour values may be automatically be prepopulated for review by Smart Audit.

Continued on next page

Using Estimate Review Line Level on CCC® Portal, Continued

Perform Review, continued

Here is an example of a completed Estimate line:

Line	Description	Reason	Changes
1	Fender	Labor OW	Please enter comments...
	Price Amount	Labor Hours	Paint Hours
Current	\$ 612.28	3.5	2.5
New	\$ 612.28	1.5	2.5
Difference	\$ 0	2.0	0

Buttons: Add Additional Reason, Upload Images, Delete Estimate Line, Remove From Review, Undo Changes

Delete Estimate Lines

There is also a **Delete Estimate Line** checkbox for each Estimate line selected for review. If you check this box, the new fields will become unavailable and the change request will reflect that the line should be removed from the Estimate.

Example Reason: No visible damage Enter applicable comments, and select **Delete Estimate Line**.

Line	Description	Reason	Changes
1	Fender	Labor OW	Please enter comments...
	Price Amount	Labor Hours	Paint Hours
Current	\$ 612.28	3.5	2.5
New	\$ 612.28	1.5	2.5
Difference	\$ 0	2.0	0

Buttons: Upload Images, Delete Estimate Line, Remove From Review, Undo Changes

Continued on next page

Using Estimate Review Line Level on CCC® Portal, Continued

Other Charges Here is an example of a completed Other Charges line:

Other Charges

Line	Description	Reason *	Changes
OC	E.P.C.	Select a Reason	Please enter comments...

Charge Amount	
Current	\$ 15.00
New	\$ 15.00
Difference	\$ 0.00

[Add Additional Reason](#)

[Remove From Review](#)

Totals As you make changes to the selected Estimate lines, you can view the running Totals section at the bottom of the Request Supplement page.

Totals

	Cost Of Repair	Part Price	Labor	Paint	Body Supplies	Paint Supplies	Other Charges
Original	\$ 13,671.78	\$ 11,129.28	\$ 1,590.00	\$ 937.50	\$ 0.00	\$ 0.00	\$ 15.00
Review	\$ 13,671.78	\$ 11,129.28	\$ 1,590.00	\$ 937.50	\$ 0.00	\$ 0.00	\$ 15.00
Difference	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Review Over Estimated		\$ 0.00	Review Under Estimated		\$ 0.00		

Estimate Review Comments

Save Review: Save your review and resume it at a later time via the Action: Continue Saved Review.

Preview Report: Generate a preview report in a new window. The report will display "Preview" to indicate that this is not the final report.

Document Only: Save the changes to the Claim Folder but do not send a request to the shop.

You can go back to the Combined View to select more lines to review.

[Select Additional Lines](#)

Cancel
Save Review
Preview Report
Document Only
Request Supplement

Continued on next page

Using Estimate Review Line Level on CCC® Portal, Continued

Estimate Review Comments

You can add overall comments when you create a review via the Portal. Comments can be entered in the **Estimate Review Comments** field, which is towards the bottom of the Totals section.

The screenshot shows the 'Totals' section of the CCC Portal. It features a table with columns for Cost Of Repair, Part Price, Labor, Paint, Body Supplies, Paint Supplies, and Other Charges. Below the table is a text field labeled 'Estimate Review Comments', which is highlighted with an orange border. At the bottom right, there are buttons for 'Cancel', 'Save Review', 'Preview Report', 'Document Only', and 'Request Supplement'.

	Cost Of Repair	Part Price	Labor	Paint	Body Supplies	Paint Supplies	Other Charges
Original	\$ 13,671.78	\$ 11,129.28	\$ 1,590.00	\$ 937.50	\$ 0.00	\$ 0.00	\$ 15.00
Review	\$ 13,671.78	\$ 11,129.28	\$ 1,590.00	\$ 937.50	\$ 0.00	\$ 0.00	\$ 15.00
Difference	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Review Over Estimated		\$ 0.00		Review Under Estimated		\$ 0.00	

Estimate Review Comments

Buttons: Cancel, Save Review, Preview Report, Document Only, Request Supplement

The comments you enter in the Estimate Review Comments field are displayed under the Reinspection Info section on the Estimate Review Report (.pdf).

The screenshot shows the 'Reinspection Info' section of an Estimate Review Report. It contains a table with various fields and their values. The 'Overall Comments' field is highlighted with an orange border and contains the text: 'These are my overall Estimate Review Comments for this review'.

Reinspection Info	
Type	Reinspection On
Location	Discussed With
Location Name	Driveable Yes
Vehicle	2016 VW Golf GTI SE w/Direct Shift Gearbox w/Performance Pkg
VIN	Odometer 25500
License	Color silver
Agreement Reached	Total Loss No
Overall Rating	Supplement Required No
Overall Comments	Classification
Overall Comments	These are my overall Estimate Review Comments for this review

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Using Estimate Review Line Level on CCC® Portal, Continued

Review Report

Once you click **Send and Return to Estimate**, the **Estimate Review Report** will automatically be added to the Review tab for you.

08-02-2016
09:25:51 CDT

Report Complete

Estimate Review Report

WORKFLOW INSURANCE COMPANY

Written By: [Redacted] Phone: [Redacted]

Claim Info

Claim Office	[Redacted] CLAIM	Claim Number	[Redacted]
Appraisal Source	[Redacted]	Claim Version	E01
Address	[Redacted]	Claim Type	Vehicle

Claim Folder View

You will have to **refresh**  the Claim Folder view in order to see the Estimate Review Report there.

Summary Documents (4) Images (20) Notes History					
2010 Audi A3 PREMIUM					
Documents for Review					
Date	Document	Est/Supp	Amount	Submitted By	Status
03/07/2016	★ Estimate 01	E01	\$2546.60	[Redacted]	Declined
Most Recent Claim Information					
Date	Document	Est/Supp	Amount	Status	
08/02/2016	Estimate Review Report	E01	\$2454.60	Submitted	
03/07/2016	Audit Report	E01	3006	Submitted	

Continued on next page

Using Estimate Review Line Level on CCC® Portal, Continued

No Estimate Lines Selected

The last item we should mention is what happens if you do not select any Estimate lines to review and then choose Request Supplement and click Go on the Combined View tab.

Instead of opening to the Request Supplement section, the system will open to the **Reinspection Details** section of the Estimate Review.

The screenshot shows the 'Estimate Review' interface with the 'Reinspection Details' section active. The 'Request Supplement' button is highlighted, and a callout box points to it with the text 'Click here to add Estimate lines to the Review.' Below the form is a 'Totals' table.

	Total Cost Of Repair	Part Price	Labor	Paint	Body Supplies	Paint Supplies
Original	\$ 2,546.60	\$ 2,546.60	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Review	0	0	0	0	0	0
Difference	0	0	0	0	0	0
Review Over Estimated		0	Review Under Estimated		0	

As you can see here, the Reinspection Details are blank so you can enter information or select options as needed.

You can add additional Estimate lines as needed.

When ready, click **Request Supplement** at the very bottom of the page and proceed as shown previously to create your Estimate Review Report.