

CCC® Portal Estimate Review Process

Overview

This job aid outlines the steps for reviewing Estimates, reviewing Supplements, and requesting changes using the CCC® Portal.

Process Review

Please review this process map for a high-level understanding of reviewing Estimates and requesting changes.

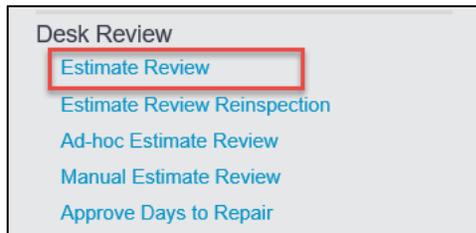


* **Note:** The name of this worklist is dependent on your company's implementation. Refer to your Implementation Guidelines for additional information.

Home Page

To begin, go to <https://www.mycccportal.com>.

1. Locate the Claim and open its **Claim Folder**.
Note: This can be done via the Quick Search for Claim Folders or via a Worklist for Estimate Review Claims.
2. Click **Estimate Review** from the left side panel Desk Review section.

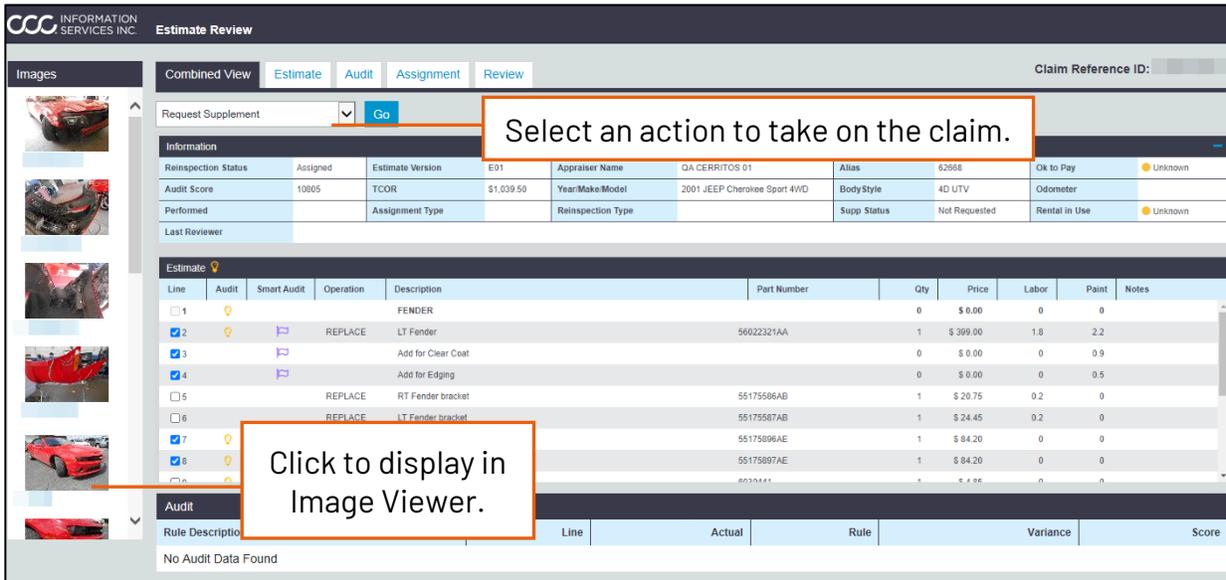


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Using Estimate Review

Introduction

This job aid describes the tabs and features available in Estimate Review. Once you open the Claim Folder and click **Estimate Review**, the Estimate opens in a combination display that shows information such as Reinspection Status, Estimate, Audit Score, and Images.



Select an action on the Estimate:

Action	Description	Instructions on Page(s)
Request Supplement	Creates a Claim Folder Note which is Delivered to CCC ONE® Estimating as an Insurance Message.	Pages 3 - 4
Approve Estimate	Confirm approval of Estimate.	Page 5
Confirm Total Loss	Confirm Total Loss decision.	Page 5
Escalate to Field	Send to field inspector for further review.	Page 6
Request Photo Only	Request additional photos without creating an Estimate Review Report.	Page 7
Continue Saved Review	Resume saved Estimate Review	Page 7

Important: The actions you see displayed in the dropdown menu might differ based on your role, your permissions, and on your company's implementation of Estimate Review.

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Using Estimate Review, Continued

Request Supplement

If you review the Estimate and Audit Report and determine changes are needed, select **Request Supplement**. To do this, go to the **Combined View**, select the **checkbox(es)** of the **Estimate Line(s)** to be changed and select **Request Supplement** from the dropdown menu at the top of the page. Then, click **Go**. The Estimate Review popup opens. **Complete each section as needed.**

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 (default), 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 the 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 (there is a 100-character limit).
Overall Rating	This field allows the user to select an overall review rating. Values can vary by Carrier.

Note: Users with advanced line level permissions can specify the initial values pre-populated in the **Reinspection Type***, **Performed***, and **Location Type** fields. For instructions on how to do this, see [page 10](#).

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Using Estimate Review, Continued

Request Supplement

In the Estimate Review popup, update the selected **Estimate Line(s)** to indicate the required changes.

If additional changes are needed, select **Add Additional Change** in the Request Supplement section. The Request Supplement window displays. Enter changes that are required.

Request Supplement

Line: 2 Description: REPLACE RT Quarter panel Reason: Select a Reason Changes: Please enter comments...

	Price Amount	Labor Hours	Paint Hours
Current	\$ 549.92	17	3.2
New	\$ 530.00	16.0	5.6
Difference	\$ (19.92)	\$ (2.08)	\$ 4.80

Add Additional Reason

Enter changes and a New Price Amount and select all reasons that apply. To choose more than one reason, click the Add Additional Reason button.

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.

Totals

	Cost Of Repair	Part Price	Labor	Paint	Body Supplies	Paint Supplies
Original	\$ 594.28	\$ 549.92	\$ 35.36	\$ 9.00	\$ 0.00	\$ 0.00
Review	\$ 5					
Difference	\$ (

Save Review Preview Report Document Only Request Supplement

After adding your Description, New Price Amount, requested Changes, and selecting the relevant Reason(s), select the **Request Supplement** button in the lower right corner of the window. You will see the following popup. An Insurance note will be sent to the shop and the claim will now appear in the **Reinspection Assignments-Active** worklist. Actions are also captured in the Claim Folder History.

Supplement Requested Successfully

The supplement has been successfully requested.

[Return to Estimate](#)

For information regarding what the shop sees, see Page 8.

When the Supplement is returned, the request will appear in the Review Changes Worklist*.

* **Note:** The name of this worklist is dependent on your company's implementation. Refer to your Implementation Guidelines for additional information. If available, some reason code and labor hour values may be recommended for review by the Smart Audit AI models.

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Using Estimate Review, Continued

Approve Estimate

If Changes were Requested via Supplement: When the Supplement is returned, the request will appear in the Review Changes Worklist*.

* **Note:** The name of this worklist is dependent on your company's implementation. Refer to your Implementation Guidelines for additional information.

If you review the Estimate and Audit Report and everything looks good, select **Approve Estimate**. To do this, use the Actions dropdown menu to select **Approve Estimate** and then click **Go**.

A popup window opens. Enter Inspection details and comments and click **Submit Request**. If enabled on the shop side, a Claim Note will automatically be sent to the shop letting them know of the approved Estimate or Supplement.

The screenshot shows a software interface with a top navigation bar containing 'Combined View', 'Estimate', 'Audit', 'Assignment', and 'Review'. Below this is a dropdown menu with 'Approve Estimate' selected and a 'Go' button. A modal window titled 'Approve Estimate' is open, featuring a close button (X) in the top right. The modal contains two dropdown menus: 'Inspection Type' and 'Inspection Location'. Below these is a 'Comments' section with a text area containing the placeholder 'Please enter comments...'. At the bottom right of the modal are 'Cancel' and 'Submit Request' buttons.

Confirm Total Loss

Select **Confirm Total Loss** from the Actions dropdown menu and click **Go**. Select the proper option, enter comments and click **Submit Request**. A confirmation page appears.

The Estimate/Supplement will be removed from the Estimate/Supplement worklist.

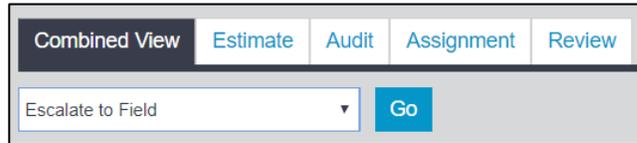
The screenshot shows the same software interface as above. The dropdown menu now has 'Confirm Total Loss' selected. The modal window is titled 'Confirm Total Loss' and has a close button (X) in the top right. It features two radio buttons for 'Total Loss': 'Yes' and 'No'. Below this is a 'Comments' section with a text area containing the placeholder 'Please enter comments...'. At the bottom right of the modal are 'Cancel' and 'Submit Request' buttons.

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Using Estimate Review, Continued

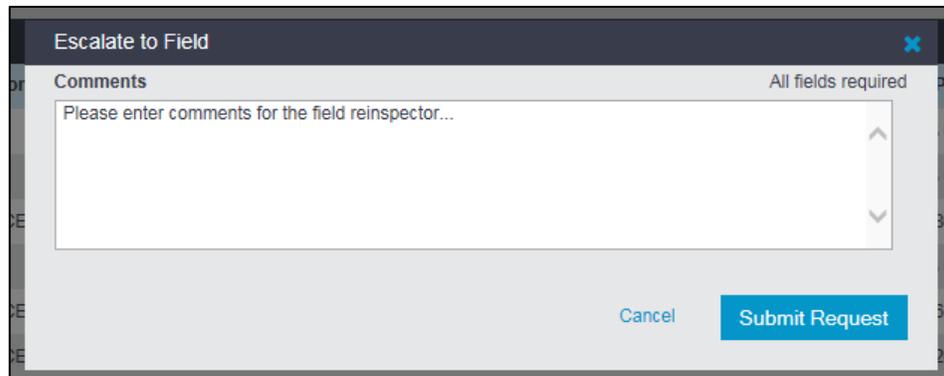
Escalate to Field

Review the claim. Go to the **Combined View**, select **Escalate to Field** from the Actions list, and click **Go**.



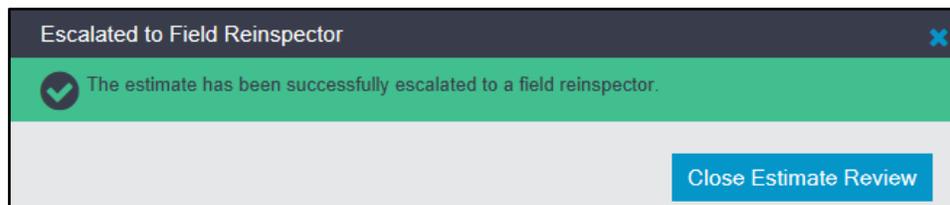
The screenshot shows a navigation bar with tabs for 'Combined View', 'Estimate', 'Audit', 'Assignment', and 'Review'. Below the tabs is a dropdown menu with 'Escalate to Field' selected and a blue 'Go' button to its right.

The following window displays. Add a comment and then click **Submit Request**. The Field Reinspector will be assigned based on your company's configuration of Field Reinspectors to shop relationships.



The screenshot shows a dialog box titled 'Escalate to Field' with a close button (X) in the top right corner. It contains a 'Comments' section with a text area and a 'Submit Request' button. The text area has a placeholder: 'Please enter comments for the field reinspector...'. There is also a 'Cancel' button and a 'Submit Request' button at the bottom right.

A summary page appears as confirmation of action. Click **Close Estimate Review**.



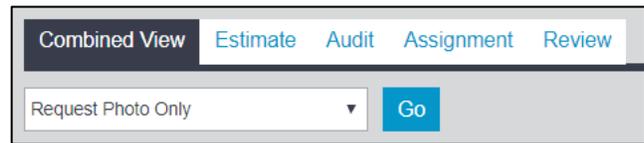
The screenshot shows a confirmation dialog box titled 'Escalated to Field Reinspector' with a close button (X) in the top right corner. It features a green checkmark icon and the text: 'The estimate has been successfully escalated to a field reinspector.' A blue 'Close Estimate Review' button is located at the bottom right.

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Using Estimate Review, Continued

Request Photo Only

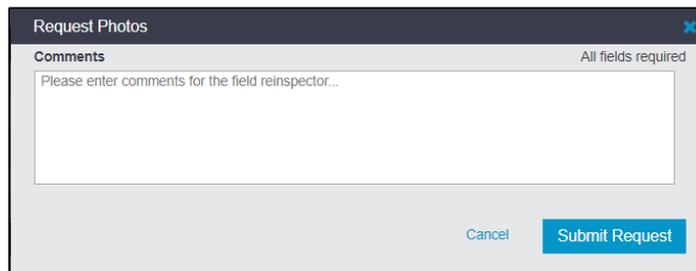
To request additional photos without creating an Estimate Review report select **Request Photo Only** from the Actions dropdown menu and click **Go**.



This action will be recorded as an Estimate Review Action in the Estimate Review Summary Report. A Claim Folder Note will be created and stored in the Claim folder, along with a business event. An Insurance Message will be created for a CCC ONE® shop and a non CCC ONE® Shop will receive a Claim Folder Note.

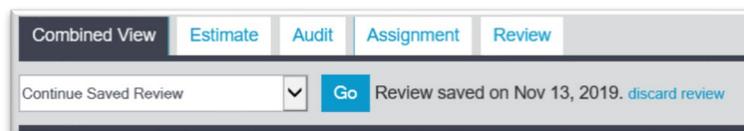
For additional information on what the shop sees when Request Photos only is selected, see page 9.

When the photos are uploaded/added to the Claim Folder, the status will be updated from Photos Requested to Photos Received.

A screenshot of a 'Request Photos' dialog box. It has a title bar with a close button. Below the title bar is a 'Comments' section with a text area containing the placeholder text 'Please enter comments for the field reinspector...'. To the right of the text area is the text 'All fields required'. At the bottom of the dialog are two buttons: 'Cancel' and 'Submit Request'.

Continue Saved Review

If the **Save Review** button was selected during the Estimate Review, the review will be saved and can be resumed at later time. When ready to resume, select **Continue Saved Review** from the Actions dropdown menu and click **Go**.

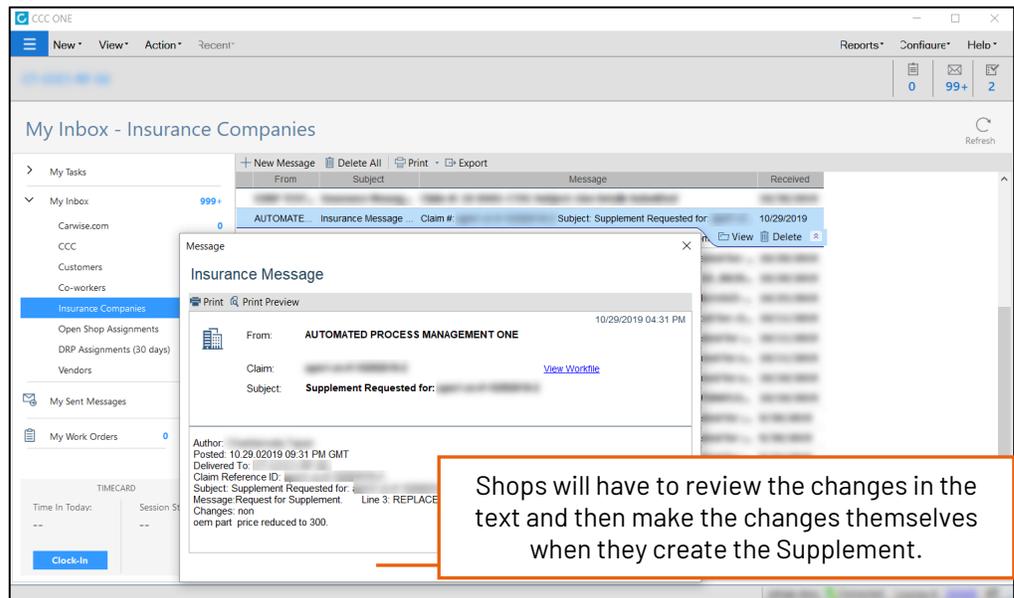


Note: The saved review can also be discarded from this screen.

What the Shop Sees

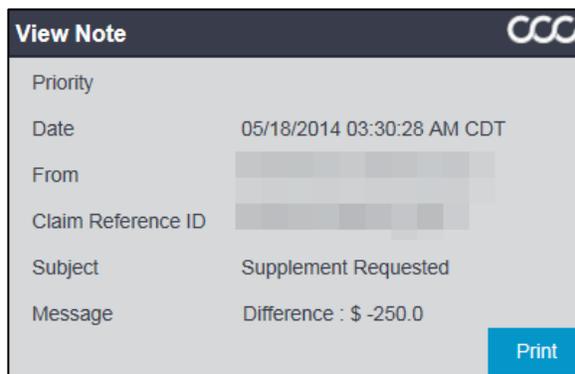
CCC ONE® Repair Facility View

Once a request is generated, the shop will see the request as the following: **Insurance Message of Supplement Received**



Notifications initially display in the bottom right corner of the screen to let the user know a message has been received.

Non-CCC ONE® Repair Facility View



Non-CCC ONE® repair facilities will log into MYCCCPORTAL as normal and will receive the request as a Claim Note just as they do for all claims.

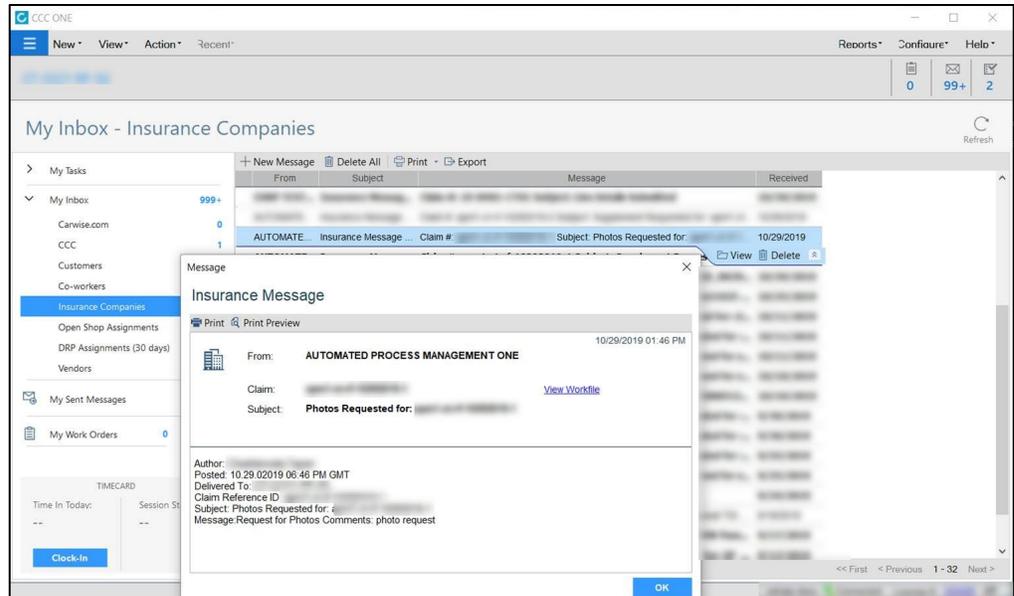
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What the Shop Sees, Continued

CCC ONE® Repair Facility View - Request Photos Only

When the Request Photos Only action is submitted, an Insurance Message will be created for a CCC ONE® shop.

CCC ONE® - Insurance Message:
Subject: Photos Requested for (Claim Number)



Non-CCC ONE® Repair Facility View - Request Photos Only

When the Request Photos Only action is submitted, a non-CCC ONE® Repair Facility will receive a claim folder note.

Non-CCC ONE® Claim Folder Note:
Category: Reinspection
Notification: Photos Requested for (Claim Number)



Estimate Review User Options

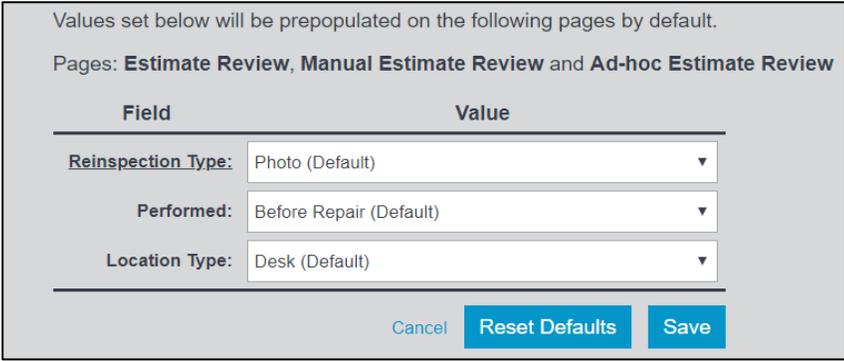
Overview

Users with advanced line level permissions can specify the initial values pre-populated in the **Reinspection Type***, **Performed***, and **Location Type** fields. The values selected will pre-populate these fields within Estimate Review, Manual Estimate review and Ad-hoc Estimate Review.

If these values are NOT manually specified, the system default values will be used:

- **Reinspection Type:** Photo
- **Performed:** Before Repair
- **Location Type:** Desk

Procedure

Step	Action
1	<p>From the CCC Portal Homepage, select Estimate Review User Options from the Utilities section of the left side menu.</p> 
2	<p>Specify the desired values for the Reinspection Type, Performed, and Location Type fields. If needed, click Reset Defaults to return to the system defaults.</p> 
3	<p>Click Save. When within Estimate Review, Manual Estimate review and Ad-hoc Estimate Review the selected values will be the pre-populated values of these fields.</p>