

Manual Estimate Review for CCC® Portal

Overview

Manual Estimate Review is a feature for CCC® Portal that allows insurers with CCC® Focus to manually perform a reinspection; this is useful in cases such as a Total Loss or for an employee audit.

The Manual Estimate Review feature allows users to create a review with or without estimate data in the claim folder; in either case, users can manually enter review details.

A Manual Estimate Review can be created in the following scenarios:

- When *no* estimate or supplement data exists in the claim folder (this could be because a paper estimate hasn't yet been rekeyed into CCC ONE® by the carrier).
- When a claim folder does *not* contain assignment data/details (in this case, the folder was created based only on estimate data).
- When a claim folder does contain estimate or supplement data.
- When the claim has a Market Valuation Report (MVR) either with or without estimate data; in this case, the user might want to create a manual review to document items that were missed or not needed or to note that an incorrect valuation was given on the MVR. **Note:** Manual Estimate Review is *not* a Total Loss Reinspection tool, and it does not update the MVR or affect the total loss decision; it is only used to document the Total Loss review.

Note: Detailed descriptions of each Manual Review field can be found at the end of this document on pages 7-11.

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Manual Estimate Review for CCC® Portal, Continued

Performing a Manual Estimate Review

Before we look at how to create a Manual Estimate Review, two notes:

1. The user does *not* need to be the assigned Reinspector on the claim in order to create a Manual Estimate Review, but the system will assign the user as the Reinspector if no Reinspector was previously assigned. The user must also have the appropriate role(s) and user type in order to create a Manual Estimate Review.
2. The system does not discriminate based on Appraisal Source since estimate/supplement data is not used to generate the review. For example, if the user's company does not allow Estimate Reviews of Staff-written estimates, the user can still perform a Manual Estimate Review since the Appraisal Source is not considered by the system.

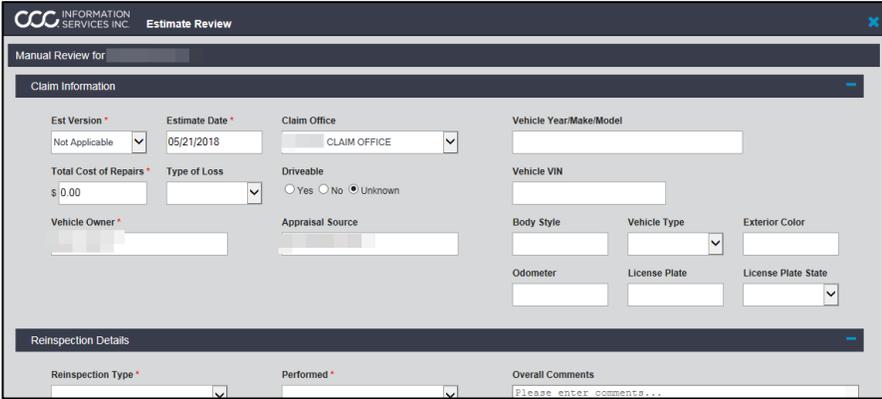
Follow these steps to perform a Manual Estimate Review:

Step	Action
1	Login to the CCC® Portal.
2	Locate and open the desired claim folder .
3	<p>Click the Manual Estimate Review link under the Desk Review section in the claim folder's left side panel.</p> <p>The Manual Review page opens.</p> 

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Manual Estimate Review for CCC® Portal, Continued

Performing a Manual Estimate Review, cont.

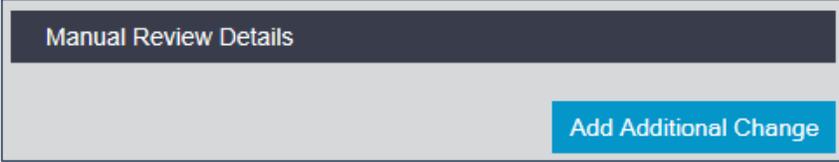
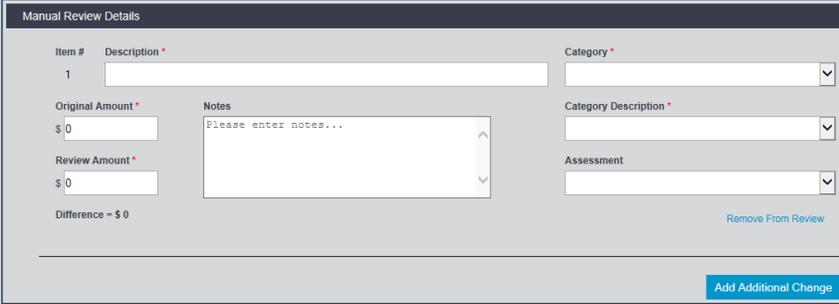
Step	Action
4	<p>The Claim Information section contains key details about the claim; the fields here are pre-populated if the necessary data is available in the claim folder. Edit any values in this section that need to be changed. You can also complete any empty fields. (Descriptions of each of the Manual Review fields can be found at the end of this document.)</p> <p>The required fields in this section are: Est Version, Estimate Date, Total Cost of Repairs, and Vehicle Owner.</p>  <p>Note: The Claim Information and Reinspection Details sections can be collapsed and expanded by clicking on the section header or the blue - and + to the far right.</p>
5	<p>Scroll down and complete the Reinspection Details section. The required fields in this section are: Reinspection Type, Performed, and Location Type.</p> 

Note: Any modifications to the pre-populated data on this page are only represented in the Manual Estimate Review Report we are generating; **the claim folder is not updated to reflect the changes you make to any values on the Manual Review page.**

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Manual Estimate Review for CCC® Portal, Continued

Performing a Manual Estimate Review, cont.

Step	Action
6	<p>Scroll down to the Manual Review Details section; click the Add Additional Change button in the lower right corner of the section to enter the Manual Review details.</p>  <p>Upon clicking the Add Additional Change button, the review detail fields are available for you to complete.</p> 
7	<p>Complete the Manual Review Details fields as needed.</p> <p>The required fields in this section are: Description, Category, Category Description, Original Amount, and Review Amount.</p> <p>To remove an item from the Manual Review, click the Remove from Review link towards the lower right corner of the section; to add another item, click the Add Additional Change button.</p>

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Manual Estimate Review for CCC® Portal, Continued

Performing a Manual Estimate Review, cont.

Note: As dollar values are entered into the Original Amount and Review Amount fields under the Manual Review Details section, the dollar difference for the item displays beneath the Amount fields:

Manual Review Details

Item #	Description *	Category *
1	Mirror	Repair vs Total Loss
Original Amount *	Notes	Category Description *
\$ 150	Please enter notes...	Repairable not Total Loss
Review Amount *		Assessment
\$ 45		
Difference = \$ -105.00		

A sum total of the dollar difference for all items displays in the Totals section at the bottom of the page:

Totals	
Total Cost Of Repair	
Original	\$ 450.00
Review	\$ 305.00
Difference	\$ -145.00

Step	Action
8	Add changes as necessary by using the Add Additional Change button (steps 6 and 7).
9	<p>When your review is complete, click the Submit Manual Review button in the lower right corner of the page. A confirmation popup appears; click the Return to Summary button in the popup to close it.</p> <p>The popup and the Manual Review page close, and you are taken back to the claim folder. The Manual Estimate Review Report you created can be found under the claim folder's Documents tab.</p> <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;"> <p>Save Review: Save your review and resume it at a later time via the Action: Continue Saved Review.</p> <p>Preview Report: Generate a preview report in a new window. The report will display "Preview" to indicate that this is not the final report.</p> </div>

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Accessing the Manual Estimate Review Report

Upon clicking the Submit Manual Review button, the Manual Estimate Review Report is generated. The .PDF can be accessed under the claim folder's **Documents** tab. (Additionally, Manual Estimate Review event notes are listed under the **History** tab.)

Summary Documents (2) Images (0) Notes History				
Documents				
<input type="checkbox"/>	Date ▼	Document	Amount	Est/Supp
<input type="checkbox"/>	05/21/2018 3:00 PM CST	Manual Estimate Review Report	\$305.00	NA
<input type="checkbox"/>	02/01/2018 9:21 AM CST	Appraisal Assignment		

Click the **Manual Estimate Review Report** link in the Document column to open the .PDF (right); save or print the report as needed.

05-21-2018 18:00:21 CDT							
Review ID: [REDACTED]							
Manual Estimate Review Report							
/ INSURANCE COMPANY							
Written By: f [REDACTED]							
Claim Info							
Claim Office	[REDACTED] CLAIM OFFICE	Claim Number	[REDACTED]				
Appraisal Source	[REDACTED]	Claim Version	NA				
Vehicle Owner	[REDACTED]	Estimate Date	05/21/2018				
Type of Loss	Collision	Vehicle	1999 [REDACTED]				
Driveable	Yes	VIN	UNK				
Odometer	190000	License	1234567				
Color	Tan	License Plate State	Illinois				
Body Style		Vehicle Type	Car				
Reinspection Info							
Type	Photo	Reinspection On	Before Repair				
Location	Desk	Classification					
Location Name		Overall Rating					
Overall Comments							
Totals							
Category	Original Amount	Review Amount	Difference				
Total Cost of Repair	\$ 450.00	\$ 305.00	\$ 145.00 ▼				
Line							
Line	Description	Category	Category Description	Assessment	Original	Review	Difference
1	Mirror	Repair vs Total Loss	Repairable not Total Loss		\$ 150.00	\$ 45.00	\$ 105.00 ▼
2	Scratch	Repair vs Total Loss	Repairable not Total Loss		\$ 185.00	\$ 125.00	\$ 40.00 ▼

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Manual Estimate Review for CCC® Portal, Continued

Appendix: Descriptions of Manual Review Fields

Claim Information Section	
Est Version	This required field defaults to the latest estimate or supplement version in the claim folder; if no estimate or supplement is available, the field defaults to Not Applicable. Available values: <ul style="list-style-type: none"> • Not Applicable • E01 • S01 - S99
Estimate Date	This required field defaults to the date the latest estimate or supplement was received; if no estimate or supplement is available, the field defaults to the current date. Click in this field to open a calendar from which you can select a different date (either the current date or one in the past).
Claim Office	This optional field defaults to the claim office noted in the assignment / claim folder; select a different claim office from the dropdown menu if desired.
Total Cost of Repairs	This required field defaults to the TCOR from the latest estimate or supplement; if no TCOR is available, the field will be blank. Enter a positive or negative dollar amount if desired. This figure displays as the Original Amount under the Totals section on the Manual Estimate Review Report.
Type of Loss	This optional field defaults to the type of loss noted in the original assignment, if available; if no type of loss is noted in the assignment, the field will be blank. Select a different value if needed. Available values: <ul style="list-style-type: none"> • Collision • Comprehensive • Liability • Property • Unknown • Other
Driveable	This field defaults to the driveable status noted in the original assignment, if available. Select a different status by clicking the appropriate radio button. Available values: <ul style="list-style-type: none"> • Yes • No • Unknown

Note: Editing or entering values on the Manual Review page does *not* update the claim folder; the values are only used to create the Manual Estimate Review Report.

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Manual Estimate Review for CCC® Portal, Continued

**Appendix:
Descriptions
of Manual
Review
Fields, cont.**

Claim Information Section, cont.	
Vehicle Owner	This required field defaults to the vehicle owner/insured noted in the claim folder, but a different name can be entered if needed. This field accepts up to 100 alphanumeric characters.
Appraisal Source	This optional field defaults to the appraiser (authorized owner) noted in the claim folder, though it can be blank. Enter a different appraisal source if desired. This field can be left blank or up to 100 alphanumeric characters can be entered.
Vehicle Year/Make/Model	This optional field defaults to the vehicle year, make, and model noted in the claim folder, if available, though it can be blank. Enter the appropriate data if desired.
Vehicle VIN	This optional field defaults to the VIN noted in the claim folder, if available, though it can be blank. Enter a VIN if desired.
Body Style	This optional field defaults to the body style noted in the claim folder, if available, though it can be blank. Enter a body style if desired. This field accepts up to 100 alphanumeric characters.
Vehicle Type	This optional field defaults to the vehicle type noted in the claim folder, if available, though it can be blank. Select a type from the dropdown menu if desired. Available values: <ul style="list-style-type: none"> • Car • Other • Personal Property • Pickup • Specialty Car • Utility Vehicle • Van
Exterior Color	This optional field defaults to the exterior color noted in the claim folder, if available, though it can be blank. Enter an exterior color if desired. This field accepts up to 20 characters.
Odometer	This optional field defaults to the odometer reading noted in the claim folder, if available, though it can be blank. Enter a new value if desired. This field accepts up to 10 alphanumeric characters.

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**Appendix:
Descriptions
of Manual
Review
Fields, cont.**

Claim Information Section, cont.	
License Plate	This optional field defaults to the license plate noted in the claim folder, if available, though it can be blank. Enter a new license plate number if desired. This field accepts up to 10 alphanumeric characters.
License Plate State	This optional field defaults to the license plate state noted in the claim folder, if available, though it can be blank. Select a new license plate state from the dropdown menu if desired.

Reinspection Details Section	
Reinspection Type	This field is required. The values available in the dropdown menu are: <ul style="list-style-type: none"> • Photo • Physical • Video
Location Type	This field is required. The values available in the dropdown menu are: <ul style="list-style-type: none"> • Desk • Drive-In • Field • Home • Non Drive-In • Other • Repair Facility • Salvage Yard • Virtual • Work
Location Name	If desired, enter the name of the location where the inspection took place. This field accepts up to 100 characters.
Performed	This field is required. The values available in the dropdown menu are: <ul style="list-style-type: none"> • Before Repairs • During Repairs • After Repairs • Total Loss

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Appendix: Descriptions of Manual Review Fields, cont.

Reinspection Details Section, cont.	
Classifications	This field is optional. If desired, select a single classification from the dropdown menu. Note: These values are carrier-specific.
Overall Rating	This field is optional. If desired, select an overall rating from the dropdown menu. Note: These values are carrier-specific.
Overall Comments	This field is optional. If desired, enter your overall comments. This field accepts up to 250 characters, and the number of remaining characters displays below the text box.

Manual Review Details Section	
Item #	Items are sequentially numbered as they are added to this section. If an item is removed, the system recalculates the item numbers for the entire review.
Description	This field is required. Enter a description of the item that is being added to the review. This field accepts up to 100 alphanumeric characters.
Original Amount	This field is required and defaults to \$0. Enter the original dollar amount of the item that is being added to the review. The amount can be positive, negative, or zero.
Review Amount	This field is required and defaults to \$0. Enter the review dollar amount of the item that is being added to the review. The amount can be positive, negative, or zero.
Difference	The dollar difference between the Original Amount and Review Amount displays below the Review Amount field. The positive or negative amount displayed here is the result of subtracting the Original Amount from the Review Amount.
Notes	This field is optional. If desired, enter a note consisting of up to 250 alphanumeric characters.
Category	This field is required. Select the appropriate category from the dropdown menu. Note: These values can be carrier-specific.
Category Description	This field is required. Select the appropriate category description from the dropdown menu; these values are tied to the selected Category, and values will not appear in this menu until a Category is selected. Note: These values can be carrier-specific.

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Appendix: Descriptions of Manual Review Fields, cont.

Manual Review Details Section, cont.	
Assessment	This field is optional. The values available in this dropdown menu are tied to the Category and Category Description selected, and the dropdown remains empty if no values exist for the selected Category and Category Description combination. Note: These values can be carrier-specific.
Remove from Review	Click this link to remove the item from the review. A confirmation message appears, and the system recalculates the remaining item numbers if needed.
Add Additional Change	Click this button to add another item to the review.

Totals Section	
Original	This is the original Total Cost of Repair dollar amount (from the Claim Information section). If the Total Cost of Repair field is edited, the new figure is reflected here.
Review	This is the sum of all the Difference amounts (taken from the items in the Manual Review Details section) plus the Total Cost of Repair amount (from the Claim Information section). This dollar amount can be negative or positive.
Difference	This figure is the result of subtracting the Original amount from the Review amount. This dollar amount can be negative or positive.

Reinspection Metrics	
Total Additions	This is the total under estimated amount.
Total Subtractions	This is the total over estimated amount.
Actual Difference	This is the Total Subtractions minus the Total Additions.
Absolute Difference	This is the Total Subtractions plus the Total Additions.
Satisfactory Dollars*	This is the total cost of repair minus the Total Subtractions.
Base Estimate Dollars*	This is the total cost of repair plus the Total Additions.
Percent Satisfactory*	This is the satisfactory dollars divided by the base estimate dollar.

* Denotes a field which contains a calculation that is customizable by client.