

Appointment Booking – My Appointments

Overview

When assignments are sent to the Appraiser, it may be up to the Appraiser to contact the customer and set up an appropriate appointment time. These appointments can be created for same day or future dates, depending on what is best for both the appraiser and the customer.

Logging In

In order to create an appointment, the first thing the appraiser needs to do is to login to the CCC ONE® Scheduling portal.

Stage	Description
1	Go to www.mycccportal.com .
2	Enter your User ID and Password .
3	Click on Log in .

Note: Once you have logged in, you will be taken to the Home page of the CCC Portal. From the home screen you can navigate to any part of Scheduling as needed.

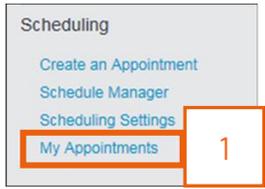


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Appointment Booking – My Appointments, Continued

My Appointments Once you have successfully logged into the Portal you can navigate to the My Appointments link within Scheduling. This is where your current appointments and assignments to be scheduled reside.

From this area we can reschedule Appointments, Reassign Appointments and Book appointments from Assignments.

Step	Action
1	To begin, select the My Appointments link from the Scheduling section on the left side of the screen. 
2	The Appointments tab of the My Appointments page opens. This page shows all of your scheduled appointments for a specific time period. This will also include your lunch breaks and any other Activities that you have scheduled during that time frame. 
3	To see Assignments requiring Appointments, select the Assignments tab. 

Note: The Appointment booking buttons are available for each claim in both Appointments and Assignments tabs. This allows for scheduling and rescheduling of Appointments in an efficient manner.

Claim Number	Name	Phone	Address	Created	
				Apr 17, 2017	Appt Booking

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Appointment Booking – My Appointments, Continued

Booking an Appointment

Find the Assignment you would like to book an Appointment for and select the **Appt Booking** button.

Fields marked with * are required.
Your schedule has the following assignments from 04/08/2017* to 04/18/2017*

Claim Number	Name	Phone	Address	Created ^	
[REDACTED]	[REDACTED]		[REDACTED]	Apr 17, 2017	<input type="button" value="Appt Booking"/>

In the Book Appointment field, most of the information will be prefilled by FNOL, however, any missing required fields (with a red asterisk *) must be filled in.

Appraiser:

To reassign this claim to a specific appraiser, use the Appraiser field at the top of the screen. This field will auto populate the appraiser's name as you start typing it. Select Reassign when you have found the appraiser you want to send the assignment to.

Note: This is the appropriate way to reassign to a new appraiser. If you have access to additional search options, please use this option.

Appointment Type:

Appointment Type should come prefilled by the FNOL group - however this can be changed if needed. The Appointment Type and Required Skills field will help determine appointment duration.

Supplement Appointment:

If this is a Supplement Appointment, select both the Supplement Appointment and the Supplement check boxes.

Note: Supplement Appointments will appear in CCC ONE® Estimating with the original appointment date and time. Refer to My Appointments or the Mobile App to get the correct Supplement date and time.

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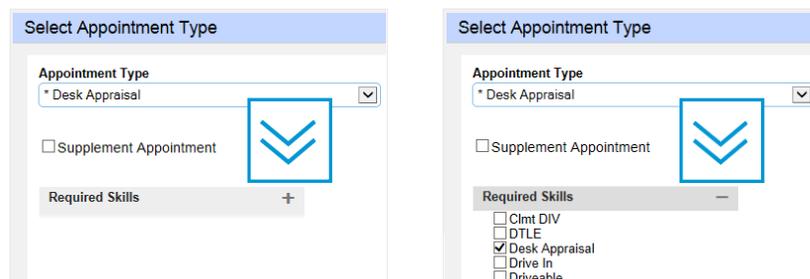
Appointment Booking – My Appointments, Continued

Booking an Appointment, continued

Required Skills:

The Required Skills field should come prefilled with the assignment. Changes can be made if necessary, to this field.

Hide or reveal the skills by using a collapse bar:



The **Appraisal Location** fields will be prefilled to the Vehicle Owner's address. If this location is not correct (i.e. you are viewing the vehicle at the Vehicle Owner's work address or a different location) these fields may be edited as needed.

Contact Information fields will not come prefilled by the system. Fill in the pertinent information into the fields. In these fields, fill in the information for the person who will be with the vehicle at the time of the inspection. For example, if Student is the vehicle owner but his wife Sarah will be home at the time of the inspection, fill in her information here.

Note: If the **Receive Texts?** box is checked, the mobile phone will receive an Appointment Confirmation message via text messaging.

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Appointment Booking – My Appointments, Continued

Booking an Appointment, continued

All the fields marked with a **single red asterisk *** are required. At least one field must be filled in for the fields noted with a double red asterisk ******.

The **Notes** field is used for any specific information for the appraiser about the appointment. If you need to remember, for example, where the car is parked or what buzzer to ring, use this field for Contact Notes. This will transfer to the Mobile App and My Appointments screen.

The last field to be completed is the **Choose Appointment Time** section. The Appointment Starting On Date is when the system should start looking for available appointments. It will default to the current day but can be modified based on customer needs.

The **And Next Days** field denotes the number of days following that the system will search for appointments.

Appointment Duration will be prefilled based on the Appointment Type and Required Skills (at the top of the page). These can be modified but should typically be left to the defaults.

The **Appointment Window Length** drop down is the next field that needs to be selected. This drop down contains the window that the scheduling system will fill. If the customer is only available for a two hour block, that can be accommodated all the way to a three day window.

Finally select the **Book Appointment** button to search for available appointment times.

After clicking **Search Appointment**, a list of possible appraisal sources will appear based on the recommendation from the Method of Inspection product built into the FNOL process.

Select the appropriate **Appraisal Source** and available **Date and Time** that best fits the customer needs.

When the Appointment has been booked completely, you will see a confirmation screen. This appointment can be Rescheduled from this screen. You can also Create a New Appointment here.

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Appointment Booking – My Appointments, Continued

Modify an Appointment

Once an Appointment is booked, modifications can be made. In the event a customer needs to change a date or time, that can be changed easily through the CCC Portal. Use the following steps to Modify an Appointment:

Step	Action
1	Open the Appointments tab and select the Appointment Booking button next to the appropriate Appointment.
2	The Appointment Booking screen retains all of the original information originally entered. Make any changes as needed and continue through the Appointment Booking screen as stated above.
3	When complete, the confirmation screen will appear to notify successful rescheduling of the appointment.

Delete an Appointment

Use the following steps to delete an Appointment:

Step	Action
1	Select the claim that needs to be deleted by clicking the checkbox next to the claim number.
2	Click the Cancel Appointments button at the bottom of the screen.
3	Select Cancel from the popup that appears explaining that once an Appointment is deleted it cannot be undone. Selecting Close will keep the existing Appointment.
