

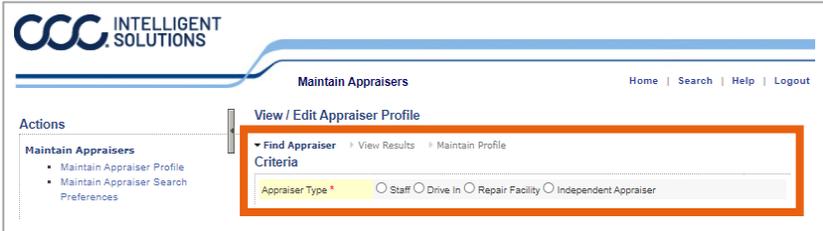
# How to Maintain Appraiser Profiles in the CCC® Portal

## Introduction

The Maintain Appraiser Profile feature allows an administrator to assign specific information to appraisal sources. This information is a part of the Search for Appraiser to Assign results list and will help an individual select the most appropriate appraisal source for a claim.

## Find Appraiser

The following table outlines the instructions for how to find an appraiser, which is the first step to maintain appraiser profiles within the CCC Portal.

Step	Action
1	<p>From the CCC Portal Home Page, click the <b>Maintain Appraiser Profile</b> link found under the Manage Work section.</p> 
2	<p>The View / Edit Appraiser Profile Page opens.</p>  <p><b>Note:</b> There are four types of Appraiser – <b>Staff</b>, <b>Drive-In</b>, <b>Repair Facility</b> and <b>Independent Appraiser</b>.</p>

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# How to Maintain Appraiser Profiles in the CCC® Portal, Continued

## Find Appraiser, continued

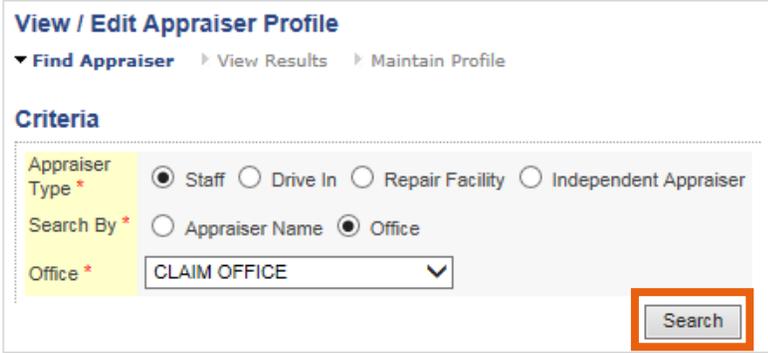
Step	Action
3	<p>To select an <i>Appraiser Type</i>, click one of the radio buttons.</p> <p><b>Note:</b> Additional criteria opens, based on the Appraiser Type selected.</p>  <p>For example, if you select <b>Staff</b>, then you must also select <i>Search By</i> criteria.</p> <p><b>Note:</b> To search by <b>Appraiser Name</b>, select either <b>starts with</b> or <b>contains</b> radio button and enter at least two characters into the <b>Last Name</b> text box.</p> 
4	<p>Select the additional search criteria. For example, if you select <b>Staff</b> and then Search By <b>Office</b>, you will need to select an Office from the drop down list.</p> 

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# How to Maintain Appraiser Profiles in the CCC® Portal, Continued

## Find Appraiser, continued

Step	Action
5	<p>Once the search criteria are set, click the <b>Search</b> button.</p> 
6	<p>The search results display.</p>  <p>From the search results, select an appraiser and click the <b>maintain profile</b> link.</p>

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# How to Maintain Appraiser Profiles in the CCC® Portal, Continued

## Edit Appraiser Profile

This is the Maintain Appraiser Profile screen:

The administrator can edit any of the following fields:

Section	How to edit the field
Description	Enter or delete additional information into the text box.
Note	Enter or delete additional information into the text box.
Rating	Select or remove a number from the drop down box.
Capacity	Enter or delete a number in the text box
Coverage	Enter zip code or zip code range into the text box. Click the add link to save it to the profile. <b>Note:</b> Click the remove link to delete it from the profile.
Status	Use the radio buttons to indicate if an Appraiser is <b>Active</b> or <b>Inactive</b> . <b>Note:</b> Select the Date Range radio button and enter the duration or select the Indefinite radio button.

Click the **Save** button once the edits are made. A confirmation message will indicate that the changes were saved:

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## How to Maintain Appraiser Profiles in the CCC® Portal, Continued

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### Maintain Drive-Ins

To search for Drive Ins to maintain, use the radio button to select **Drive In**, then indicate whether you will *Search By* Drive In Name or Office, and enter at least two characters of the **Drive In Name** section:

The screenshot shows a search criteria form titled "Criteria". It has three main sections: "Appraiser Type", "Search By", and "Drive In Name".

- Appraiser Type:** Radio buttons for Staff, Drive In (selected), Repair Facility, and Independent Appraiser.
- Search By:** Radio buttons for Drive In Name (selected) and Office.
- Drive In Name:** A text input field followed by radio buttons for "starts with" (selected) and "contains".

**Note:** The Maintain Profile fields for maintaining Drive Ins are the same as those for maintaining Staff. Please refer to the table on page 4 for how to edit an appraiser profile.

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### Maintain Repair Facilities

To search for Repair Facilities, use the radio button to select **Repair Facility** then indicate whether you will *Search By* **Appraiser Name**, **Location** or **States**. Use the text boxes or drop downs to complete the appropriate criteria.

The screenshot shows a search criteria form titled "Criteria". It has three main sections: "Appraiser Type", "Search By", and "Location".

- Appraiser Type:** Radio buttons for Staff, Drive In, Repair Facility (selected), and Independent Appraiser.
- Search By:** Radio buttons for Appraiser Name, Location (selected), and States.
- Location:** Fields for City (text input), State (dropdown menu), OR, and Postal Code (text input).

**Note:** The Maintain Profile fields for maintaining Repair Facilities are the same as those for maintaining Staff and Drive Ins. Please refer to the table on page 4 for how to edit an appraiser profile.

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## How to Maintain Appraiser Profiles in the CCC® Portal, Continued

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### Maintain Independent Appraisers

To search for Independent Appraisers, use the radio button to select **Independent Appraisers**, then indicate whether you will Search By **Appraiser Name, Location, States** or **Show All**. Use the text boxes or drop downs to complete the appropriate criteria.

**Note:** If you choose Select All, the View Results display in Alphabetical Order.

**Criteria**

Appraiser Type \*  Staff  Drive In  Repair Facility  Independent Appraiser

Search By \*  Appraiser Name  Location  States  Show All

States \*  
Hawaii  
Idaho  
Illinois  
Indiana  
Iowa

**Note:** The Maintain Profile fields for maintaining Independent Appraisers are the same as those for maintaining Staff, Drive Ins and Repair Facilities. Please refer to the table on page 4 for how to edit an appraiser profile.

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## How to Maintain Appraiser Profiles in the CCC® Portal, Continued

### Maintain Appraiser Search Preferences

An administrator can define and maintain information that is used on the Search for Appraiser criteria and results page. The setup is completed at the company level and does not differ by individual appraisal source or appraiser type.

To access this feature, click the **Maintain Appraiser Search Preferences** link under the Actions section on the Maintain Appraisers page.

**Maintain Appraiser Search Preferences**

**Selected Appraiser Types**

Staff  Drive In  
 Repair Facility  Independent Appraiser

**Results Section Display Options**

Available Sections: [Empty]  
Selected Sections: Independent Appraiser, Staff, Drive-In, Repair Facility

**Results Columns Display Options**

Available Columns: [Empty]  
Selected Columns: Appraiser, Note, Address/Phone, Description, Rating, Distance, Workload Capacity

**Primary Sort**

Distance/Appraiser  Rating

**Workflow**

Always Enter Criteria  Skip Criteria if Vehicle Location is Available

**Workload Capacity Display**

Staff:  Daily  Weekly  
Drive-In:  Daily  Weekly  
Repair Facility:  Daily  Weekly  
Independent Appraiser:  Daily  Weekly

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## How to Maintain Appraiser Profiles in the CCC® Portal, Continued

### Maintain Appraiser Search Preferences, continued

The information for the Search Preferences includes the display order of the appraisal sources and the columns that the admin wants to view in the Search Results list. An admin can make changes to the following:

Section	How to Edit
Select Appraiser Types	This is a checkbox that indicates the appraiser type defaulted as criteria. The default has all four types selected. Use the mouse to click in each check box to select or deselect the Appraiser Type.
Results Section Display Options	This indicates the order the appraisal types display in the results. Use the left / right arrows to select or deselect the appraisal types and then the up / down arrows to determine display order.
Results Column Display Options	This indicates the columns that display on the View Results page. The columns coincide with the appraiser attributes from the Maintain Appraiser Profile Section. Use the left / right arrows to select or deselect the display columns and then the up / down arrows to determine display order.
Primary Sort	The default for this sort is Distance / Appraiser. If Rating is selected, "1" becomes the highest rating in the sort and Distance (Drive In and Repair Facility) or Name (Staff and Independent Appraiser) becomes the secondary sort. Click the radio button for the sort option you wish to select.
Workflow	If "Skip Criteria If Vehicle Location is Available" is selected, the system will skip the search criteria page (if the vehicle location is on the assignment) and display the View Results page. If "Always Enter Criteria" is selected, then a user will always have to set Search Criteria. Click the radio button for the workflow option you wish to select. Note: "Always Enter Criteria" is the default.
Workload Capacity Display	For each Appraisal Source, the admin can indicate the capacity time frame by selecting Daily or Weekly. Click the radio button for either Daily or Weekly to determine the Workload Capacity you wish to select. <b>Note:</b> Daily is the default.