

How to Search for Claims to Manage

Introduction

The **Claims to Manage** search is a public search designed to provide you with an easy way to access claims in a situation in which a CCC-defined worklist does not meet your needs. An example of this is if you are working claims for another adjuster who is out of the office. This search can be used to pull back a list of claims belonging to that co-worker.


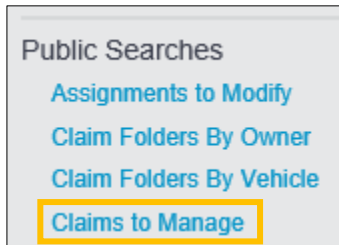
Terminology

The table below contains terms associated with Searches on the CCC Portal.

Terminology	Definition
Public Search	Any search that is defined by CCC.
Private Search	Any search that is defined or customized and saved by you. The ability to save and run Private Searches is based on your system access. When using the search screen, you will only see private searches if you have created and saved them.
View Options	A page in which you can set Criteria Defaults or Delete Private Searches. When on this page, click View Searches to return to the Search Page.
Worklist	A set of search results. For example, an adjuster may use the Claims Folder Management Worklist.

Navigate to Claims to Manage

To access the **Claims to Manage** page:

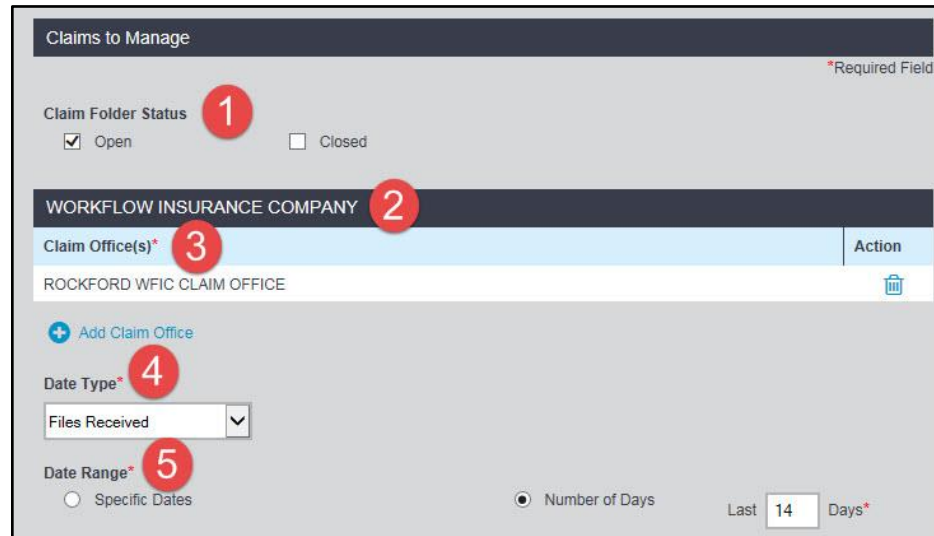
Step	Action
1	Click the Search icon from the CCC portal homepage. 
2	The Search Criteria page opens.
3	Click the Claims to Manage link under Public Searches. 

Continued on next page

How to Search for Claims to Manage, Continued

Search for Claims to Manage

From the Search page, click the **Assignments to Modify** link.



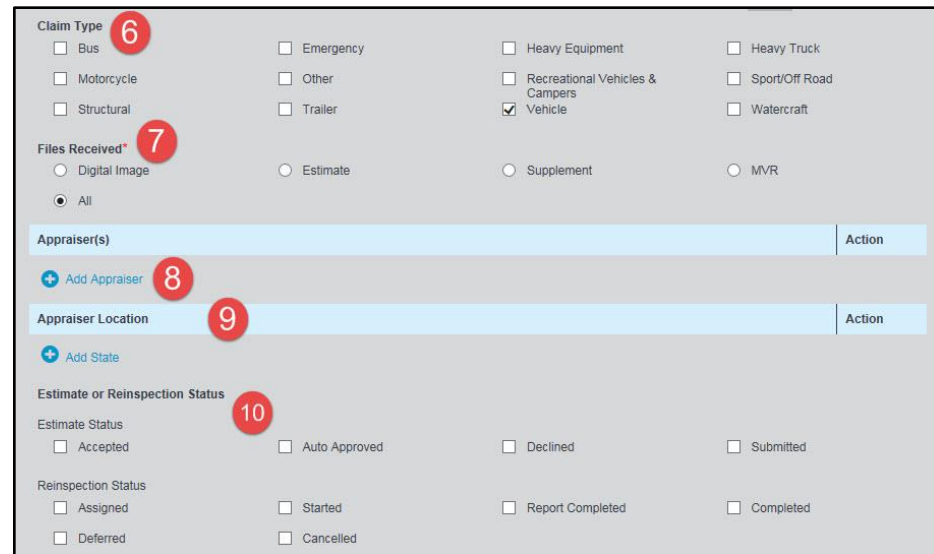
The screenshot shows the 'Claims to Manage' search interface. It includes a 'Claim Folder Status' section with 'Open' and 'Closed' checkboxes. A 'WORKFLOW INSURANCE COMPANY' header is present. Below it is a 'Claim Office(s)*' field with a table listing 'ROCKFORD WFIC CLAIM OFFICE' and an 'Add Claim Office' link. The 'Date Type*' dropdown is set to 'Files Received'. The 'Date Range*' section has 'Number of Days' selected with a value of 14. Red numbered callouts (1-5) highlight the Claim Folder Status, Insurance Company, Claim Office(s), Date Type, and Date Range fields respectively.

Criteria	Definition
1	The Claim Folder Status defaults to Open .
2	The Insurance Company field automatically fills in with your company name.
3	Claim Office(s) is a required field, identifies the claim office or offices that you want to search by. The default is to your claim office, click the Add Claim Office link to add or remove offices from the search criteria.
4	Date Type is a required field and identifies the kind of dates you want to search by. The types include Assignment Created Date , Assignment Sent Date , Appointment Date , Date Reported , Date of Loss , and Files Received .
5	Date Range is a required field that tells the application how far back it should look for the data. If you select Specific Dates , a calendar helper displays and you can select those dates. If you choose Number of Days , you can enter the number of days back that you want to search. The default is 14 days while the maximum is 60 days.

Continued on next page

How to Search for Claims to Manage, Continued

Search for Claims to Manage (continued)



The screenshot shows a search interface for claims. It includes sections for Claim Type (with checkboxes for Bus, Motorcycle, Structural, Emergency, Other, Trailer, Heavy Equipment, Recreational Vehicles & Campers, Vehicle (checked), Heavy Truck, Sport/Off Road, and Watercraft), Files Received* (with radio buttons for Digital Image, Estimate, Supplement, MVR, and All), Appraiser(s) (with an Add Appraiser link), Appraiser Location (with an Add State link), and Estimate or Reinspection Status (with checkboxes for Accepted, Auto Approved, Declined, Submitted, Assigned, Started, Report Completed, and Completed). Numbered callouts 6 through 10 highlight specific features: 6 points to the Claim Type section, 7 points to the Files Received* section, 8 points to the Add Appraiser link, 9 points to the Add State link, and 10 points to the Estimate or Reinspection Status section.

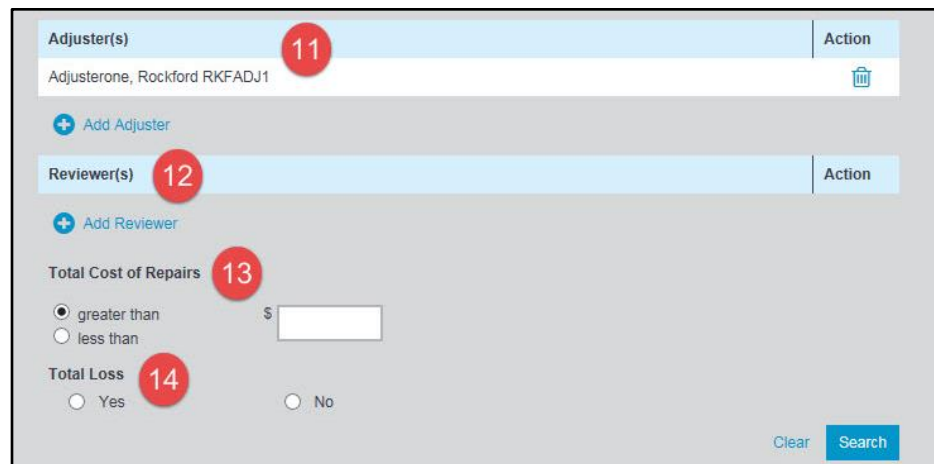
Criteria	Description
6	Claim Type allows you to specific the type of property involve in the claim. The default is Vehicle.
7	Use the radio button to select the Files Received you would like to search.
8	Use the Add Appraiser link to add Appraisers to the search criteria. Note: Use the check box in the Search Results to select all of the appraisers to add to your search criteria.
9	Use the Add State link to add an Appraiser Location .
10	Use the checkboxes to select the Estimate and / or Reinspection status by which you wish to search. Note: Search Results are returned if the most current version of the claim documentation meets either the selected Estimate or Reinspection Status criteria.

Continued on next page

How to Search for Claims to Manage, Continued

Search for Claims to Manage (continued)

Once you have completed your search criteria, click the Search button to run the search.



The screenshot shows a search criteria form with the following elements:

- Adjuster(s)** (11): A text field containing "Adjusterone, Rockford RKFADJ1" and an "Action" button.
- Add Adjuster**: A blue link with a plus icon.
- Reviewer(s)** (12): A text field and an "Action" button.
- Add Reviewer**: A blue link with a plus icon.
- Total Cost of Repairs** (13): A section with two radio buttons: "greater than" (selected) and "less than". Next to the "greater than" radio is a text box with a dollar sign.
- Total Loss** (14): A section with two radio buttons: "Yes" (selected) and "No".
- Clear** and **Search** buttons at the bottom right.

Criteria	Description
11	If you are an adjuster, your name is automatically added to the Adjuster(s) field. If you want to add other adjusters, use the Add Adjuster link to access a dialog box to add them to the search criteria.
12	If you are a Reviewer , your name is automatically added. If you want to add other reviewers, use the Add Reviewer link to access a dialog box to add them to the search criteria.
13	Use the radio button and text box to select a Total Cost of Repairs dollar range to search.
14	Use the radio buttons to indicate if you want to search for Total Loss Claims .

Once you have completed your search criteria, click the **Search** button to run the search.

Continued on next page

How to Search for Claims to Manage, Continued

Search Results: Claims to Manage Search

This is an example of the Claims to Manage Search Results.

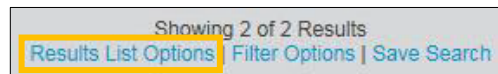


<input type="checkbox"/>	Claim Reference ID	Latest File Received Date	Total Cost of Repairs	Est/Sup Status	Reinspection Status	Asg	Est	Img	Claim Folder Links	Actions
<input type="checkbox"/>	EQATC105312016025317	05/31/2016	\$ 2,429.00	DECLINED	Report Complete	✓	✓	✓	     	    
<input type="checkbox"/>	EQATC005312016023844	05/31/2016	\$ 2,429.00	ACCEPTED	Complete	✓	★	★	     	    

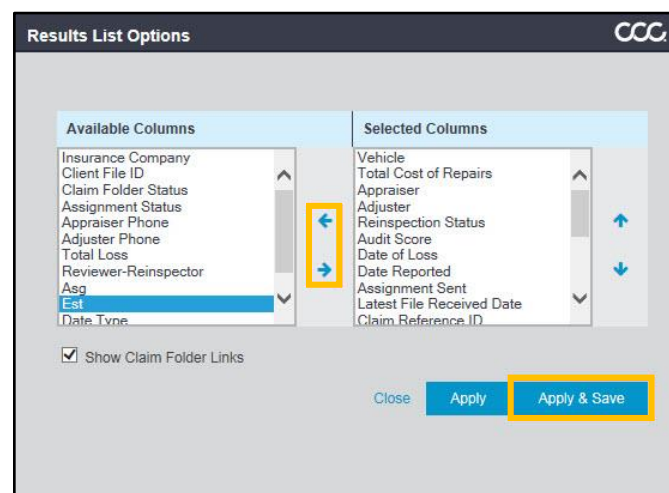
Showing 2 of 2 Results
[Results List Options](#) | [Filter Options](#) | [Save Search](#)

Note: The results are sorted by Latest File Received Date. To sort these results, you can click any of the column label links.

To add additional columns to the Results List, click the **Results List Options** link.



The Results List Options dialogue box opens, use the directional arrows to select columns. Click the **Apply & Save** button to save the changes.



Search Results List Options include (but are not limited to):

Appraiser
Date of Loss
Reinspection Status

Audit Score
Date Reported
Total Cost of Reports

Assignment Sent
Insurance Company
Vehicle