	Торіс	Page
	Using Configurable Worklists	2
	How to Use My Workview	3
	How to Select an Appraiser	4
	How to Reassign an Appraiser	8
	How to Create a Claim Folder Note from the Claim Folder in My Workview	10
	How to Create a Claim Folder Note from the Search Results Screen	12
	How to Cancel an Assignment	16
	How to Close a Claim Folder	17

CCC® Workflow – Claims Management: Using Configurable

Worklists, Continued

 Using
 Configurable Worklists are customized worklists that help facilitate your workflow.

 Worklists
 This is the title with the provided of the title work in the provided of the provided of the title work in the provided of the provided of the title work in the provided of the provided of the title work in the provided of the provided o

This job aid outlines how to use these worklists to assign an appraiser and send, reassign, and cancel an assignment.

Follow the steps below to use your Configurable Worklist.

Step	Action									
1	Your worklists are displayed in the My Work section on the CCC Portal home page.									
	CCC Portal Welcome, JANE DOE									
	Quick Search for Valuation Requests My Work Starts with v My Work Clear Search Clear Search Total Overdue									
	Valuation Request Number: starts with Clear Search 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0									
2	To view an assignment in one of your worklists, click the number in the Total column. (You can view Overdue items by clicking on the number in that column.)									
3	The My Workview page opens.									
	MINIGRMATION # Q Ø Image: Comparison of the second se									
	My Work Ready to Send Claim 10 Assgn Sent Loss Latert GREEN 01/2/2/017 TRAINING 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017 1 01/2/2/017									
	Claim Folder Assignment Entry									
	Actions Data Contacts Common Actions Common Actions Common Actions Change Cam Folder TL Indicator Oracuments foot Note									
	Upload Documents User Documents Exe supp Annost Status Actions Extende Winney Veer Enail Attachments E									
	Most Recent Claim Information									

Worklists, Continued

How to Use My My Workview displays work in four distinct panels: Workview

SERVICES INC.	My Workview									a Q	
My Work							Showing 2 clai	ms from 01/02/2	017 - 02/01/2017	Enter C	Jaim Reference
Ready to Send					0		Appraiser	Claim ID	Assgn Sent	Loss	Latest F
The second s					2		GREEN		01/26/2017 1	3 01/25/2017	
Contract of Contra					0		TRAINING	1000	01/27/2017 1	1 01/26/2017	
And a second sec					0						
							4 111		2		•
											2
Claim Folder Assignment Entry											
Actions Data Contacts	Summary	Documents (1)	Images (0)	Notes	History				Claim Fol	der: 01262017-	-mc2 😂 ^
Common Actions	2004 Kia Rio I	lanual				4					
Change Claim Folder TL Indicator	Documents fr	or Review									
Create Claim Folder Note	Deta	Decomposit		FattSunn				Statu		A stimus	
Upload Documents	Date	Document		Esusupp			All	iount statu	5	Actions	
Estimate with Images Viewer	There are no do	cuments to review.									
Claim Management	Most Recent	Claim Information									
Create Check Request	Date	Document		Es	/Supp				Amount	Status	~

Panel	Description							
1	This panel contains your worklists.							
2	This panel shows the results from the selected worklist. Sliding the scroll bar will reveal additional columns and options. Note: Checking the Overdue box will filter the results so you only see overdue items.							
3	This panel contains the available Actions , Data , and Contacts for the selected claim folder.							
4	This panel shows the selected claim folder and contains Summary, Documents, Images, Notes , and History tabs.							

Continued on next page

CCC

How to Select	Step	Action In the upper right panel of the My Workview screen, click on the claim that you want to assign to an appraiser.					
an Appraiser	1						
		Note : You can adjust the size of the four panels by clicking on and dragging the buttons indicated below.					
		My Workview					
		My Work Showing 2 claims from 01/02/2017 - 02/01/2017 🛗 Enter Claim Reference ID Q					
		O Appraiser Claim ID Assgn Sent Loss Latest 2 GREEN 01/26/2017 13:52 01/25/2017 18:00					
		0 TRAINING 01/27/2017 11:42 01/26/2017 18:00					
		Claim Folder Assignment Entry					
		Actions Data Contacts Summary Documents (1) Images (0) Notes History					
	2	Click the Create/Modify Appraisal Assignment link in					
		the lower left panel. Actions Data Contacts					
		Common Actions					
		Change Claim Folder TL Indicator Create Claim Folder Note					
		Estimate With Images Viewer Email Attachments					
		Claim Management Create Check Request					
		Change Claim Folder Status to Closed Create/Modify Appraisal Assignment					
		Manage My Reminders					
		© 2012-2015 CCC Information Services Inc. All rights reserved.					

Continued on next page

Worklists, Continued

How to Select	Step		Action	
an Appraiser,	3	Scroll down to the Ap	praiser section of th	e ccc information
continued		assignment or click A	Appraiser under Quic	k SERVICES INC.
		Links.		Quick Links
				Loss
				Adjuster
				Claim Parties
				Claim
				Vehicle
				Vehicle Damage
				Appraiser
				Policy
	4	If the desired apprais	er does not appear i	n the dropdown menu,
		click the Search for A	Appraiser link.	
		Appraiser		
		, pp.a.co.		
		Get MOI Recommendations		
		Appraiser Type*	-	
		Staff 🗸 🗸		
		Appraiser Name*		
		Addrose		Search For Appraiser
		Address		
		Phone		
	5			
		A popup window	Find Appraiser	
		opens to the		
		Search by	Search by Search by Lo	cation
		Location screen.	Location Appraiser Type Appraiser Name	Independent Appraiser 🗹 Staff 🗹 Repair Facility
			Ciaim Type	Vehicle
		(UIICK Appraiser	Location	Type Address
		Name towards the		Other
		erroop if you'd	Address	
		screen in you'u	City	
		an annraiser hy	State	~
		name) Enter the	Postal Code	
		details you have	Radius	25 V Miles
		and click Find		cancel Find Appraiser
		Appraiser		

CCC[®] Workflow – Claims Management: Using Configurable

Worklists, Continued

How to Select	Step		Action						
an Appraiser, continued	6	Your search results appear. Find the appraiser you'd like to assign and click Select in the Actions column.							
		Independent Ap	praiser						
			Appraiser 🔺		Address / Phone	Type Actions			
		GENERIC IA #	1		444 CHICAGO, IL 60654 (000) 000 - 0000	1 select			
		GENERIC IA #	2		444 CHICAGO, IL 60654 (800) 621 -	1 select			
		GENERIC IA #	3		CHICAGO, IL 60654 (800) 621 -	select			
		Staff Appraiser	15						
			Appraiser 🔺		Address / Phone	Actions			
		DOE, JOAN Showing 1 Appraise	rs		(312) 229 -	select			
		Repair Facility							
			Appraiser 🔺	Distance	Address / Phone	Actions			
		GENERIC REI	PAIR FACILITY	3.62 mi	2108 CHICAGO, IL 60622 (312) 222 -	select			
		Name f Entry p phone	fields under th age are popula number also a	e Appraiser ated. The sel	section on the Ass lected appraiser's	ignment address and			
			Appraiser Get MOI Recommendations						
		ſ	Appraiser Type* Staff Appraiser Name*	~					
			DOE, JOAN Address Phone	CHICAGO, Illinois 60654	Search For	Appraiser			
		L	(312) 229 Instructions to Estimator						
					^				
					~				
			Inspection Requirements		u of 4,000 characters used				
					^				
					~				
					0 of 64 characters used				

CCC[®] Workflow – Claims Management: Using Configurable

Worklists, Continued

How to Select	Step	Action						
an Appraiser, continued	7	Enter Instructions to Estimator and Inspection Requirements in the appropriate fields if desired. Appraiser Name* DOE, JOAN Address CHICAGO, Illinois 60654 Phone (312) 229 Instructions to Estimator 0 of 4,000 characters used 0 of 64 characters used						
	8	Scroll to the bottom of the page and click Send to send the assignment.						

CCC[®] Workflow – Claims Management: Using Configurable

Worklists, Continued

How to	Step	Action							
Reassign an Appraiser	1	On the My Workview page, select the claim you want to reassign and click the Create/Modify Appraisal Assignment link in the lower left panel.							
		My Workview							
		My Work Showing 2 claims from 01/02/2017 - 02/01/2017 🋗 Enter Claim Reference ID C							
		O Appraiser Claim ID Assgn Sent Loss Late 2 GREEN 01/26/2017 13:52 01/25/2017 18:00							
		0 TRAINING 01/27/2017 11:42 01/26/2017 18:00							
		Claim Folder Assignment Entry							
		Actions Data Contacts Summary Documents (1) Images (0) Notes Histor							
		Common Actions 2004 Kia Rio Manual Change Claim Folder TL Indicator Documents for Review Create Claim Folder Note Date Date Document							
		Estimate With Images Viewer There are no documents to review.							
		Claim Management Dete Document Est/Supp Change Claim Folder Status to Closed There is no claim information available. There is no claim information available. Create/Modify Appraisal Assignment Manage My Reminders Assignments							
	2	Scroll down to the Appraiser section of the assignment or click Appraiser under Quick Links. Quick Links Claim Parties Claim Vehicle Damage Appraiser Policy Full Entry Bottom of Page							

CCC[®] Workflow – Claims Management: Using Configurable

Worklists, Continued

How to	Step	Action					
Reassign an	3	Use the dropdown menus	to select a different Appraiser				
Appraiser,		Type and/or Appraiser Na	me . Include any additional				
continued		information as needed.					
		Appraiser					
		Get MOI Recommendations					
		Appraiser Type* Staff Appraiser Name*					
		GREEN	Search For Appraiser				
		Address					
		Phone					
		Instructions to Estimator					
		ring doorbell					
		0 of 4,000 characters used					
		Inspection Requirements					
			^				
			<u>_</u>				
			0 of 64 characters used				
		Note: You can also use the	e Search For Appraiser link to				
		find a new appraiser. From	n this screen, follow the				
		directions from the "How t	o Reassign an Appraiser"				
		section of this job aid, beg	inning at Step 4.				
	4	Once you have selected					
		the appraiser and					
		entered any additional					
		information, click the					
		Send button at the					
		bottom of the	Cancel Entry Cancel Send Send				
		Assignment Entry page					
		to send the assignment.					

Worklists, Continued

How to Create a Claim Folder	To create	a claim folder note from within the Claim Folder:				
Note	Step	Action				
	1	Click the Create Claim Folder Note link under the Actions tab in the Claim Folder.				
	2	A popup window opens. To create a note, enter a Subject (required), select a Category, select Priority and Privacy settings, enter a Message (required), and click Save or Save and Notify. Note: Selecting options from the dropdown menus in the Pre-Populate This Note section and clicking Add populates the Subject and Message fields with a predefined message.				

CCC[®] Workflow – Claims Management: Using Configurable

Worklists, Continued

How to Create	Step	Action					
a Claim Folder	3	Clicking Save and Notify opens the Notify window.					
Note,		Notify			222		
continued				Clair	n Reference ID:		
		Choose	Contact(s) To Be Notified		•		
			Contact	Туре	•		
			Jane Doe	Staff	Appraiser		
			Juanita Doe	Adju	ster		
			Jill Doe	Vehi	cle Owner		
		Forward to Email(s)(optional)					
		separate mu	Itiple email addresses by ; (ie. te	stuser@cccis.com;testadjust	er@cccis.com)		
					Cancel Notify		
		Choose appropri Note : Yo to Email	the contacts you w iate boxes in the lef ou can manually ent I (s) field. Use a sem	ant to notify by c t column. er email address icolon (;) to sepa	hecking the es in the Forward arate each address.		
	4	Click No receive a Portal ho estimati	tify . Selected users a notification in the ome page or the Inb ng platform.	associated with messages portle box within the	the claim folder et on their CCC Cancel Notify		

a Claim Folder Note.	Step	Action	
continued	1	Search for the claim by entering the claim Search for Claim Folders field on the CC and clicking Search.	m number in the Quick C Portal home page
		Note : You must enter at least four chara clicking Search .	cters in the field before
		INFORMATION SERVICES INC.	CCC Portal Welcome,
		Quick Search for Valuation Requests	Mark Work
		Claim Reference ID: starts with	My Work Worklist Name
		Clear Search Valuation Request Number:	WORKISE WATE
		starts with	And a local division of the local division o
			10000
		QUICK Search for Claim Folders	Claim Folder Manageme
		starts with 🗸	Claim Reference ID
		Search for older claim Clear Search	
		Claim Management	
		Create/Modify Assignment Search for Appraiser	Active Valuations
		Cycle Time Report	No results to display

Continued on next page

CCC® Workflow – Claims Management: Using Configurable

Worklists, Continued



CCC[®] Workflow – Claims Management: Using Configurable

Worklists, Continued

How to Create	Step	Action		
a Claim Folder	4	Clicking Save and Notify opens the Notify window.		
Note,		Notify	222	
continued			Claim Reference ID:	
			Claim Relefence ID:	
		Choose Contact(s) To Be Notified	•	
		Contact	Туре	
		Jane Doe	Staff Appraiser	
		Juanita Doe	Adjuster	
		Jill Doe	Vehicle Owner	
		Forward to Email(s)(optional)		
		separate multiple email addresses by ; (ie. testuser	@cccis.com;testadjuster@cccis.com)	
			Cancel Notify	
		Choose the contacts you want appropriate boxes in the left co Note : You can manually enter e to Email(s) field. Use a semicol	to notify by checking the Jumn. email addresses in the Forward Ion (;) to separate each address.	
	5	Click Notify.		
		Selected users associated with notification in the messages po page or the Inbox within the es	the claim folder receive a ortlet on their CCC Portal home timating platform.	

How to Create a Claim Folder Note, continued	steps:	e Note icon referenced in Step 2 doesn't appear, follow these
	Step	Action
	1	Click the Results List Options link on the Search Results page. A popup window opens. Search Results
		Back to Chiena
		Quick Search for Claim Folders Results
		Est Img Claim Reference Assignment Sent Owner Vehicle Total Cost Repairs
		01/26/2017 2004 Kia Rio Manual
		□ ★ ✔ 01/26/2017 2011 Ford MUSTANG
	2	If the box next to Show Claim Folder Links is unchecked, click on it and then click Apply & Save.
		https://www.mycccportal.com/b/search_TableSetup.jsp
		Results List Options CCC Available Columns Selected Columns Insurance Company Est Claim Folder Status Est Assignment Status Assignment Sent Owner Vehicle Total Loss Total Cost of Repairs State of Loss State of Loss State of Loss Close Apply Apply & Save
	3	The Note icon is now visible.

Continued on next page

Worklists, Continued

How to Cancel	To cancel	el an assignment:	
an Assignment			
	Step	Action	
	1	Click the Cancel Send button at the bottom of the Assignment screen. Cancel Entry <u>Cancel Send</u> Send	
	2	Confirm the cancellation by clicking Confirm Cancel Send . Do Not Cancel Send Confirm Cancel Send	
	3	A confirmation message appears:	
		Assignment Entry	
		Create / Modify Assignment - Enter Key Data	
		Success Assignment has been successfully cancelled.	
		Insurance Company *	
		Create/Modify Assignment	
		Note: When an assignment is cancelled, the staff appraiser or the DRP user will receive a popup notification in CCC ONE. This notification is also viewable in Messages.	
		However, if the assignment was not initially downloaded, no notification or message is sent.	

Worklists, Continued

Step		Action	
1	From My Workview , select the claim you want to close by clicking on it once to highlight it.		
2	Click the Change Claim F Actions tab in the Claim I	F older Statu Folder.	s to Closed link under the
	INFORMATION SERVICES INC.	My Workview	
	My Work		Showing 1 claims from 01/04/2017 - 02/03/2017
	These is the set	0	Appraiser Claim ID Assg
	The second se	1	TRAINING RF 2 01/27
	Change of Changes	0	
		0	4
	Claim Folder Assignment Entry		
		«	
	Actions Data Contacts	Summary	Documents (1) Images (0) Notes
	Common Actions	2009 Acura	TSX Automatic
	Change Claim Folder TL Indicator	Documents	s for Review
	Create Claim Folder Note	Date	Document Est/Su
	Estimate With Images Viewer	There are no	documents to review.
	Email Attachments	1.000	
	Oleire Management	Most Rece	nt Claim Information
	Claim Management Create Check Request	Date	Document
	Change Claim Folder Status to Closed	There is no c	laim information available.
	Create/Modify Appraisal Assignment		
	Manage My Reminders	and the second sec	

How to Close a To close a claim folder:

Claim Folder

Worklists, Continued

How to Close a	Step	Action
Claim Folder, continued	3	Select a Reason from the dropdown menu (required) and enter any relevant notes in the Message field.
		Claim Folder Assignment Entry
		Change Claim Folder Status Close Claim Folder Reason* Message Payment sent File cancelled Total Loss Other Cancel Submit & Notify
	4	Click Submit or Submit & Notify below the Message field. If you select Submit & Notify, use the check boxes to select the contacts you wish to notify.
		Claim Folder Assignment Entry
		Notify - Choose Contact(s) To Be Notified Title Title
		TRAINING RF Repair Facility
		TRAINING ADJ Adjuster TRAINING CANNER Vehicle Canner
		Forward to Email(s)
		(Optional)
		Separate multiple email addresses with ; (i.e., testuser@cccis.com, testadjuster@cccis.com) Cancel Notify
		You can also manually enter email addresses. Multiple email addresses must be seperated with a semicolon (;).
	5	Click Notify when finished.

