



CCC® Workflow – Claims Management: Using Configurable Worklists

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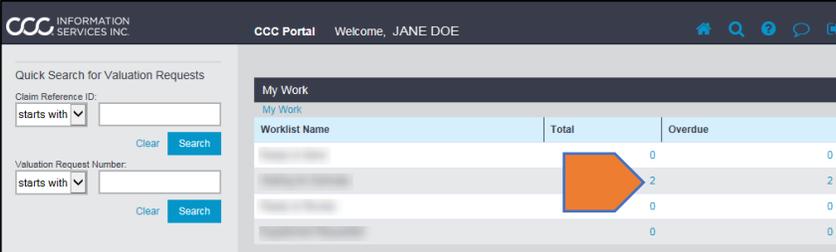
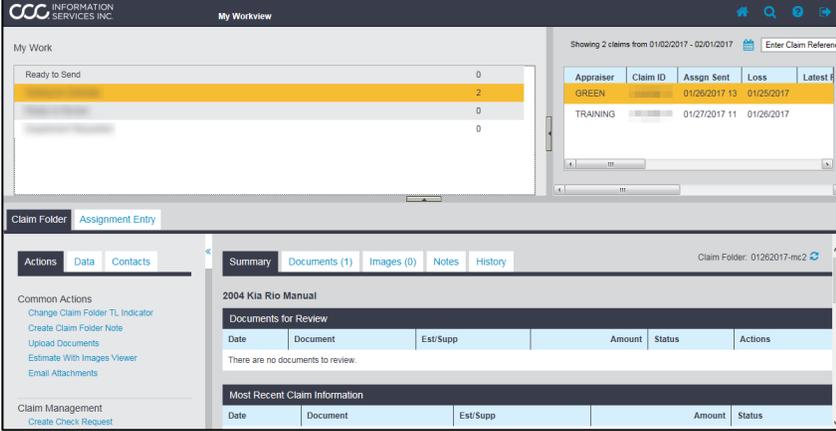
CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

Using Configurable Worklists

Configurable Worklists are customized worklists that help facilitate your workflow.

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

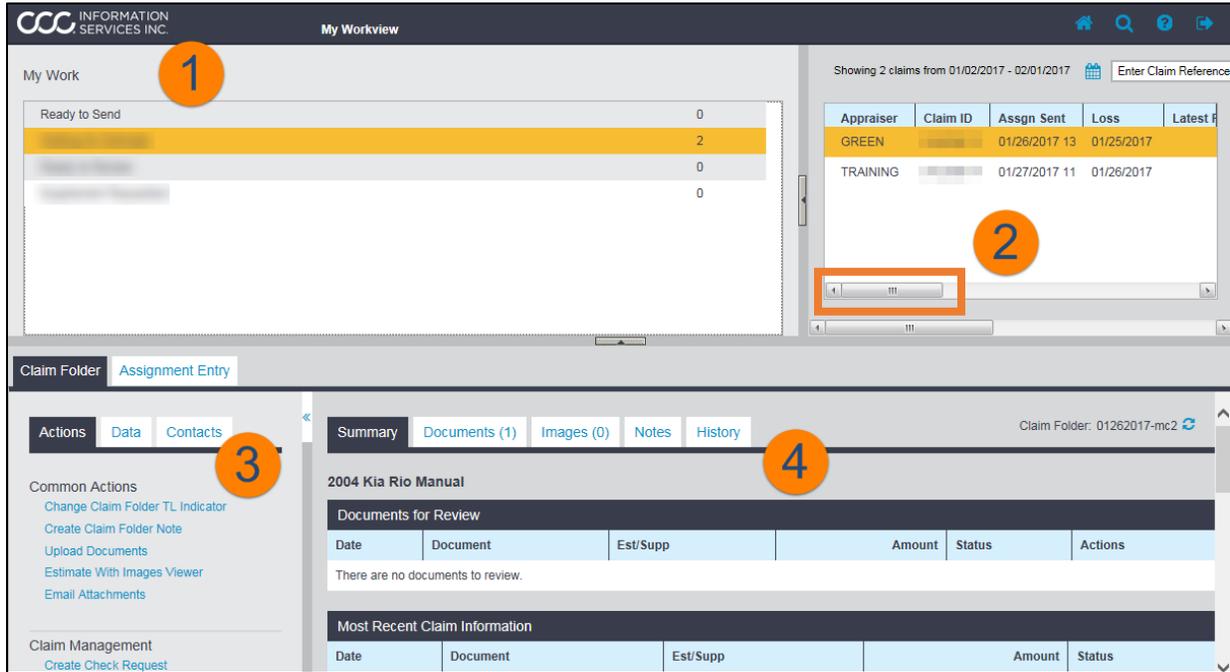
Follow the steps below to use your Configurable Worklist.

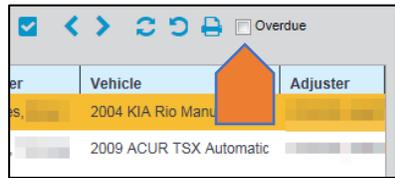
Step	Action
1	<p>Your worklists are displayed in the My Work section on the CCC Portal home page.</p> 
2	<p>To view an assignment in one of your worklists, click the number in the Total column. (You can view Overdue items by clicking on the number in that column.)</p>
3	<p>The My Workview page opens.</p> 

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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

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

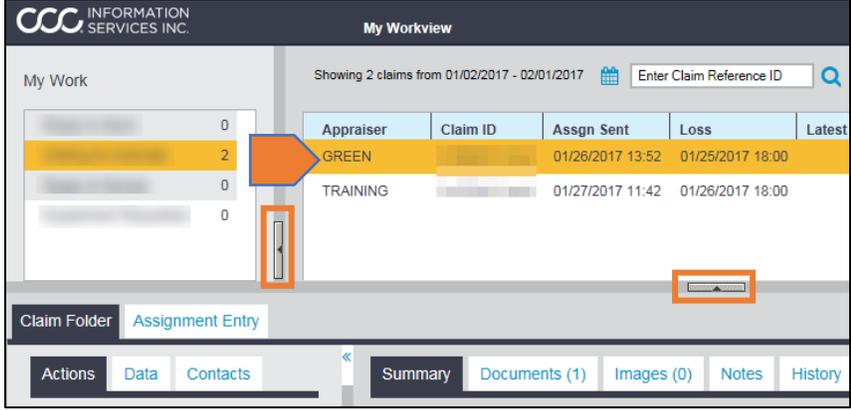
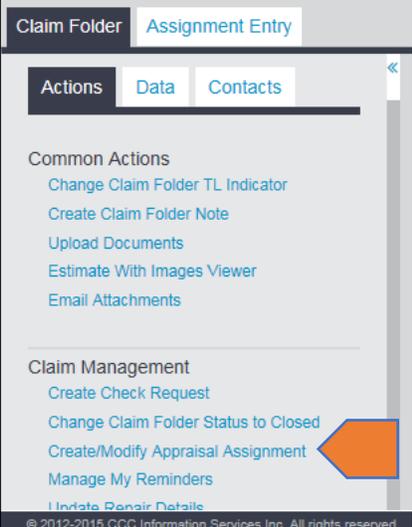


Panel	Description
1	This panel contains your worklists.
2	<p>This panel shows the results from the selected worklist. Sliding the scroll bar will reveal additional columns and options.</p> <p>Note: Checking the Overdue box will filter the results so you only see overdue items.</p> 
3	This panel contains 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.

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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

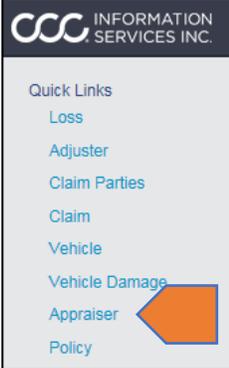
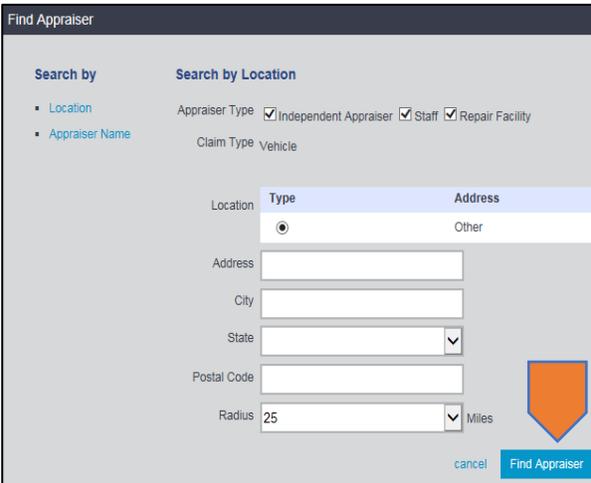
How to Select an Appraiser

Step	Action
1	<p>In the upper right panel of the My Workview screen, click on the claim that you want to assign to an appraiser.</p> <p>Note: You can adjust the size of the four panels by clicking on and dragging the buttons indicated below.</p> 
2	<p>Click the Create/Modify Appraisal Assignment link in the lower left panel.</p> 

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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

How to Select an Appraiser,
continued

Step	Action
3	<p>Scroll down to the Appraiser section of the assignment or click Appraiser under Quick Links.</p> 
4	<p>If the desired appraiser does not appear in the dropdown menu, click the Search for Appraiser link.</p> 
5	<p>A popup window opens to the Search by Location screen.</p> <p>(Click Appraiser Name towards the left side of the screen if you'd rather search for an appraiser by name.) Enter the details you have and click Find Appraiser.</p> 

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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

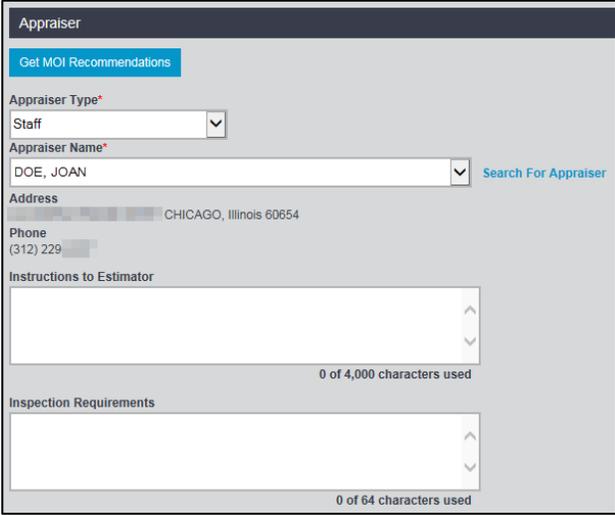
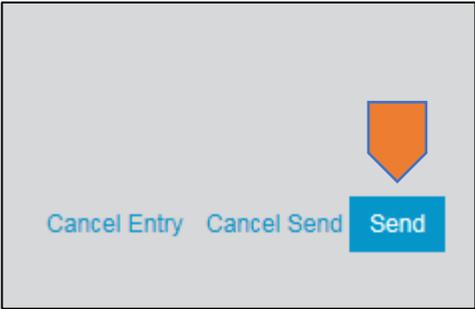
How to Select an Appraiser, continued

Step	Action																														
6	<p>Your search results appear. Find the appraiser you'd like to assign and click Select in the Actions column.</p> <div data-bbox="570 510 1412 968" style="border: 1px solid black; padding: 5px;"> <p>Independent Appraiser</p> <table border="1"> <thead> <tr> <th>Appraiser</th> <th>Address / Phone</th> <th>Type</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>GENERIC IA #1</td> <td>444 CHICAGO, IL 60654 (000) 000 - 0000</td> <td>1</td> <td>select</td> </tr> <tr> <td>GENERIC IA #2</td> <td>444 CHICAGO, IL 60654 (800) 621 -</td> <td>1</td> <td>select</td> </tr> <tr> <td>GENERIC IA #3</td> <td>444 CHICAGO, IL 60654 (800) 621 -</td> <td></td> <td>select</td> </tr> </tbody> </table> <p>Showing 3 Appraisers</p> <p>Staff Appraiser</p> <table border="1"> <thead> <tr> <th>Appraiser</th> <th>Address / Phone</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>DOE, JOAN</td> <td>(312) 229 -</td> <td>select</td> </tr> </tbody> </table> <p>Showing 1 Appraisers</p> <p>Repair Facility</p> <table border="1"> <thead> <tr> <th>Appraiser</th> <th>Distance</th> <th>Address / Phone</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>GENERIC REPAIR FACILITY</td> <td>3.62 mi</td> <td>2108 CHICAGO, IL 60622 (312) 222 -</td> <td>select</td> </tr> </tbody> </table> </div> <p>The popup window closes. The Appraiser Type and Appraiser Name fields under the Appraiser section on the Assignment Entry page are populated. The selected appraiser's address and phone number also appear:</p> <div data-bbox="672 1194 1317 1728" style="border: 1px solid black; padding: 5px;"> <p>Appraiser</p> <p>Get MOI Recommendations</p> <p>Appraiser Type* Staff</p> <p>Appraiser Name* DOE, JOAN Search For Appraiser</p> <p>Address CHICAGO, Illinois 60654</p> <p>Phone (312) 229 -</p> <p>Instructions to Estimator 0 of 4,000 characters used</p> <p>Inspection Requirements 0 of 64 characters used</p> </div>	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	444 CHICAGO, IL 60654 (800) 621 -		select	Appraiser	Address / Phone	Actions	DOE, JOAN	(312) 229 -	select	Appraiser	Distance	Address / Phone	Actions	GENERIC REPAIR FACILITY	3.62 mi	2108 CHICAGO, IL 60622 (312) 222 -	select
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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

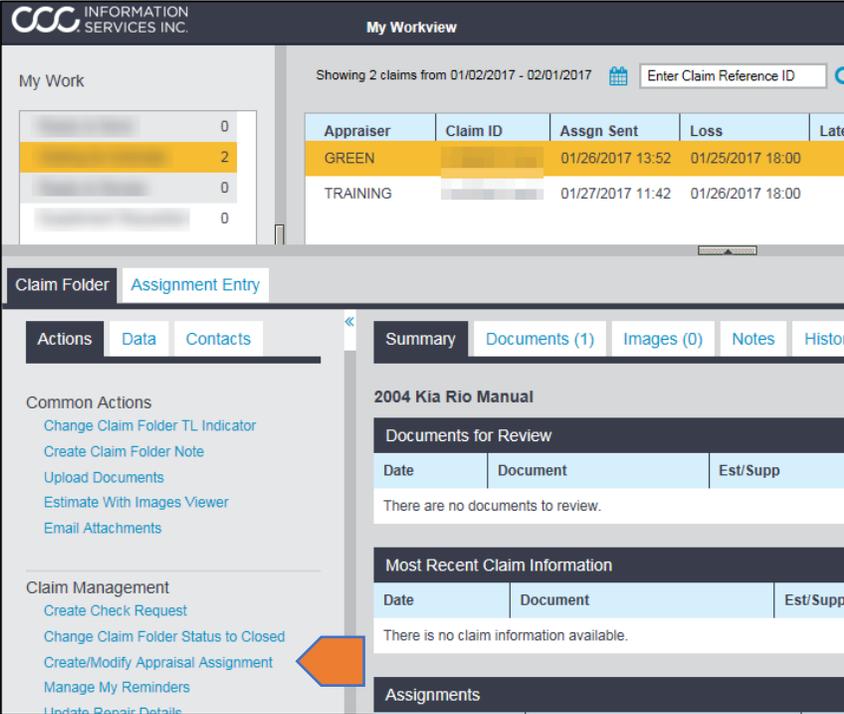
How to Select an Appraiser, continued

Step	Action
7	<p>Enter Instructions to Estimator and Inspection Requirements in the appropriate fields if desired.</p> 
8	<p>Scroll to the bottom of the page and click Send to send the assignment.</p> 

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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

How to Reassign an Appraiser

Step	Action
1	<p>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.</p>  <p>The screenshot shows the 'My Workview' interface. At the top, it says 'Showing 2 claims from 01/02/2017 - 02/01/2017'. Below this is a table with columns: Appraiser, Claim ID, Assign Sent, Loss, and Late. The first row is highlighted in yellow and contains 'GREEN', a claim ID, '01/26/2017 13:52', and '01/25/2017 18:00'. The second row contains 'TRAINING', a claim ID, '01/27/2017 11:42', and '01/26/2017 18:00'. In the bottom left sidebar, under 'Claim Management', the 'Create/Modify Appraisal Assignment' link is highlighted with an orange arrow.</p>
2	<p>Scroll down to the Appraiser section of the assignment or click Appraiser under Quick Links.</p>  <p>The screenshot shows a 'Quick Links' menu with the following items: Loss, Adjuster, Claim Parties, Claim, Vehicle, Vehicle Damage, Appraiser, Policy, Full Entry, and Bottom of Page. The 'Appraiser' link is highlighted with an orange arrow.</p>

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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

How to Reassign an Appraiser,
continued

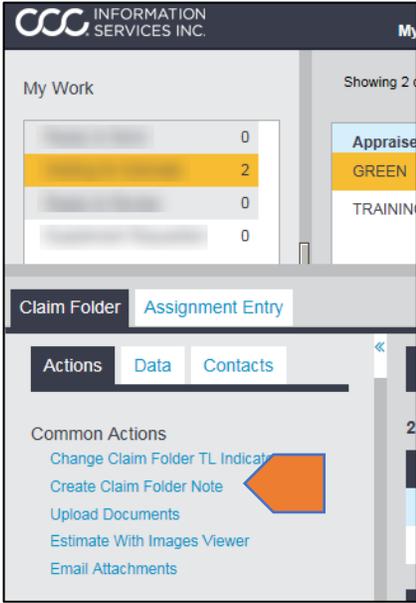
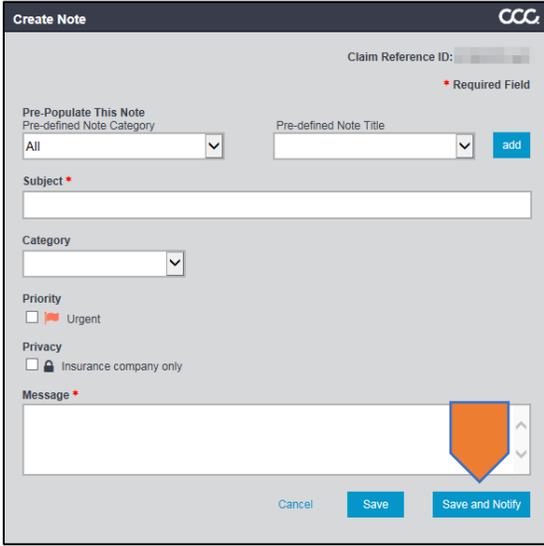
Step	Action
3	<p>Use the dropdown menus to select a different Appraiser Type and/or Appraiser Name. Include any additional information as needed.</p> <div data-bbox="576 527 1393 1207" style="border: 1px solid gray; padding: 5px;"> </div> <p>Note: You can also use the Search For Appraiser link to find a new appraiser. From this screen, follow the directions from the “How to Reassign an Appraiser” section of this job aid, beginning at Step 4.</p>
4	<p>Once you have selected the appraiser and entered any additional information, click the Send button at the bottom of the Assignment Entry page to send the assignment.</p> <div data-bbox="950 1428 1393 1713" style="border: 1px solid gray; padding: 5px;"> </div>

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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

How to Create a Claim Folder Note

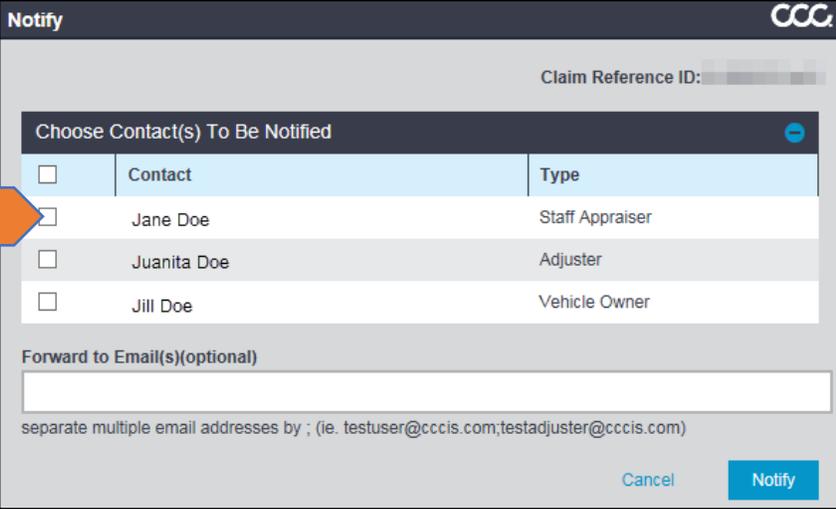
To create a claim folder note from within the Claim Folder:

Step	Action
1	<p>Click the Create Claim Folder Note link under the Actions tab in the Claim Folder.</p> 
2	<p>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.</p> <p>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.</p> 

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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

How to Create a Claim Folder Note,
continued

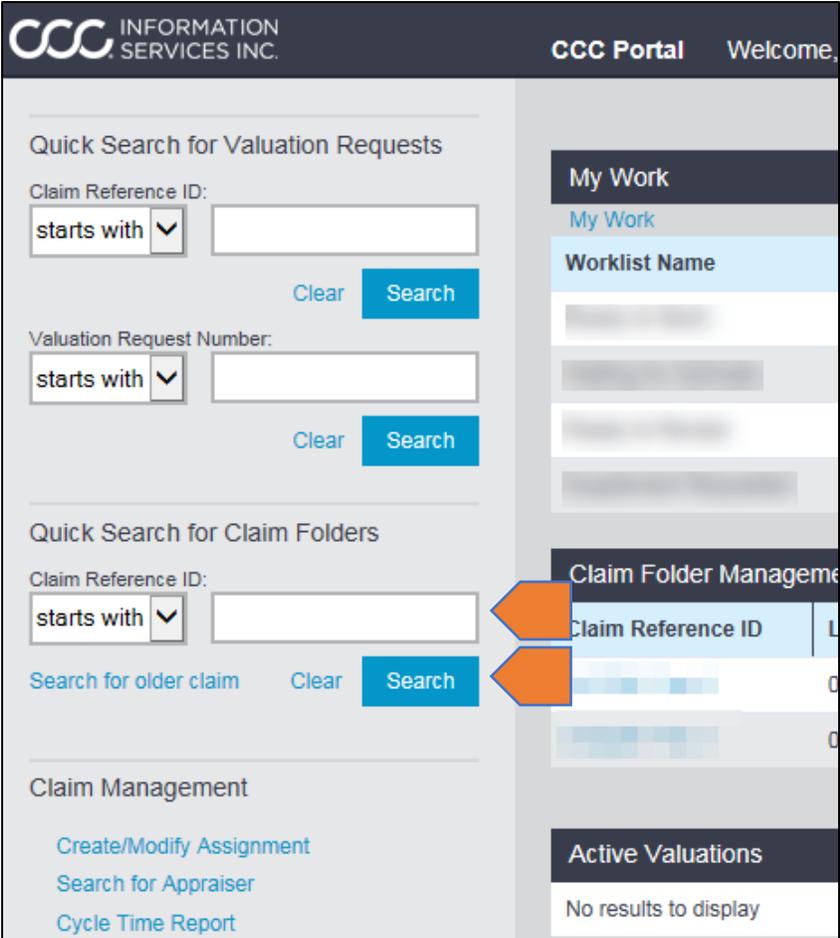
Step	Action												
3	<p>Clicking Save and Notify opens the Notify window.</p>  <table border="1" data-bbox="592 569 1390 779"> <thead> <tr> <th data-bbox="592 615 683 648"><input type="checkbox"/></th> <th data-bbox="683 615 1097 648">Contact</th> <th data-bbox="1097 615 1390 648">Type</th> </tr> </thead> <tbody> <tr> <td data-bbox="592 659 683 693"><input type="checkbox"/></td> <td data-bbox="683 659 1097 693">Jane Doe</td> <td data-bbox="1097 659 1390 693">Staff Appraiser</td> </tr> <tr> <td data-bbox="592 703 683 737"><input type="checkbox"/></td> <td data-bbox="683 703 1097 737">Juanita Doe</td> <td data-bbox="1097 703 1390 737">Adjuster</td> </tr> <tr> <td data-bbox="592 747 683 781"><input type="checkbox"/></td> <td data-bbox="683 747 1097 781">Jill Doe</td> <td data-bbox="1097 747 1390 781">Vehicle Owner</td> </tr> </tbody> </table> <p>Choose the contacts you want to notify by checking the appropriate boxes in the left column.</p> <p>Note: You can manually enter email addresses in the Forward to Email(s) field. Use a semicolon (;) to separate each address.</p>	<input type="checkbox"/>	Contact	Type	<input type="checkbox"/>	Jane Doe	Staff Appraiser	<input type="checkbox"/>	Juanita Doe	Adjuster	<input type="checkbox"/>	Jill Doe	Vehicle Owner
<input type="checkbox"/>	Contact	Type											
<input type="checkbox"/>	Jane Doe	Staff Appraiser											
<input type="checkbox"/>	Juanita Doe	Adjuster											
<input type="checkbox"/>	Jill Doe	Vehicle Owner											
4	<p>Click Notify. Selected users associated with the claim folder receive a notification in the messages portlet on their CCC Portal home page or the Inbox within the estimating platform.</p> 												

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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

How to Create a Claim Folder Note,
continued

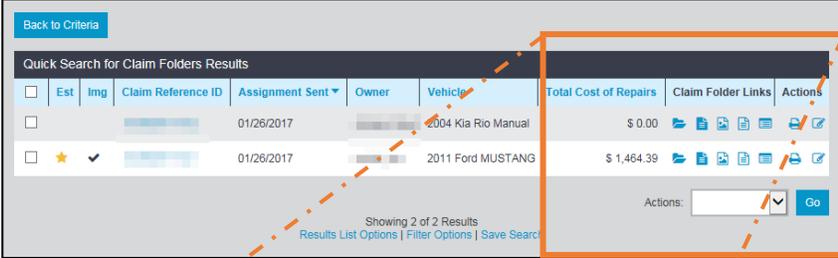
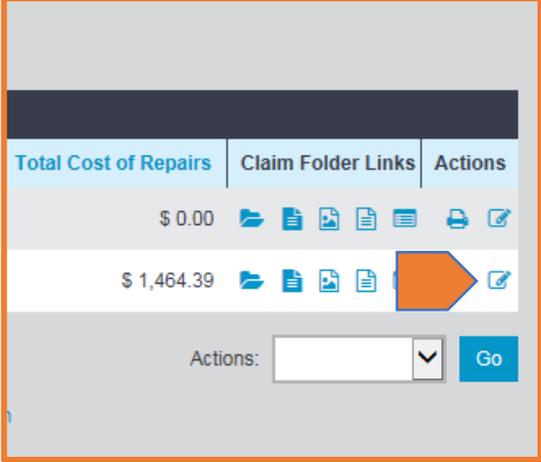
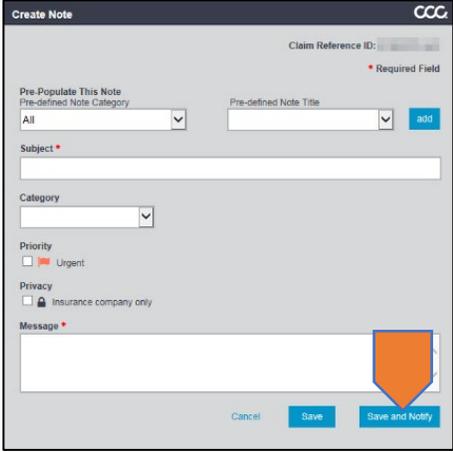
To create a claim folder note from the Search Results screen:

Step	Action
1	<p>Search for the claim by entering the claim number in the Quick Search for Claim Folders field on the CCC Portal home page and clicking Search.</p> <p>Note: You must enter at least four characters in the field before clicking Search.</p> 

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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

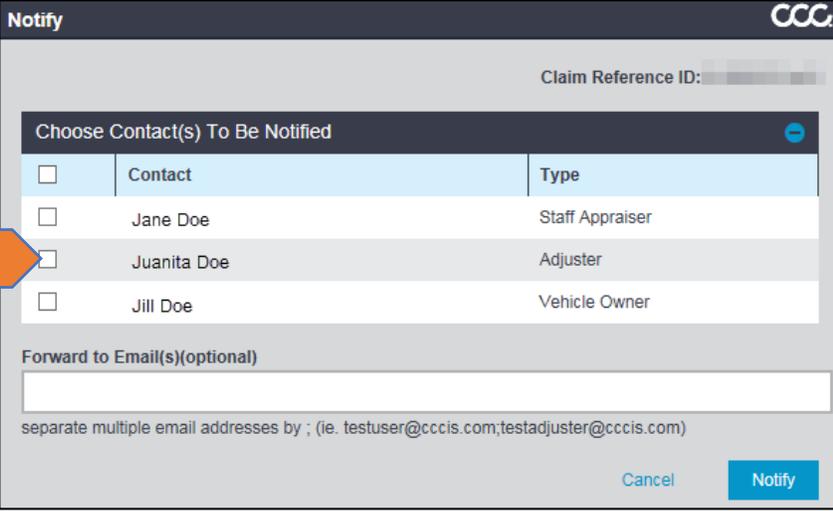
How to Create a Claim Folder Note, continued

Step	Action
2	<p>Click the Note icon in the Actions column.</p>  
3	<p>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.</p> <p>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.</p> 

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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

How to Create a Claim Folder Note,
continued

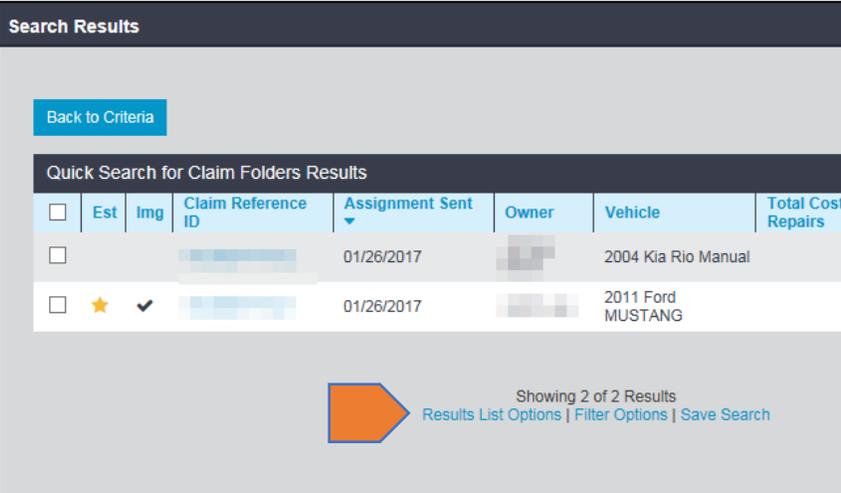
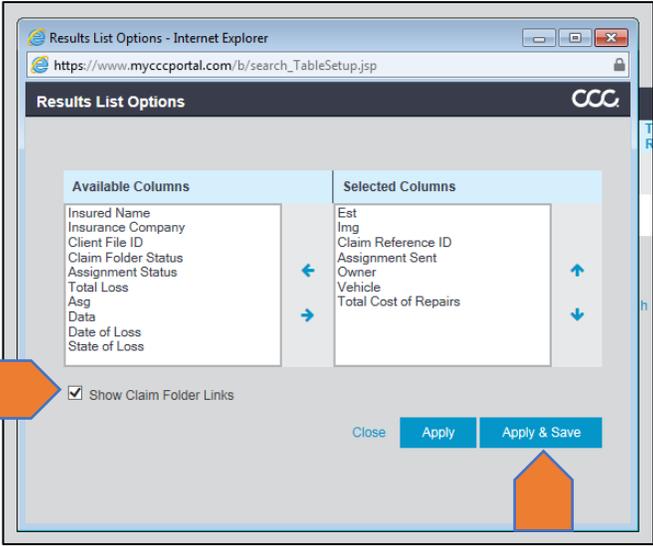
Step	Action												
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<input type="checkbox"/>	Contact	Type											
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<input type="checkbox"/>	Juanita Doe	Adjuster											
<input type="checkbox"/>	Jill Doe	Vehicle Owner											
5	<p>Click Notify.</p> <p>Selected users associated with the claim folder receive a notification in the messages portlet on their CCC Portal home page or the Inbox within the estimating platform.</p>												

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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

How to Create a Claim Folder Note, continued

Note: If the **Note** icon referenced in Step 2 doesn't appear, follow these steps:

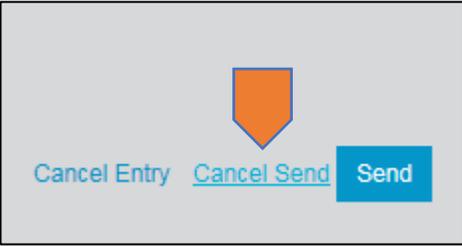
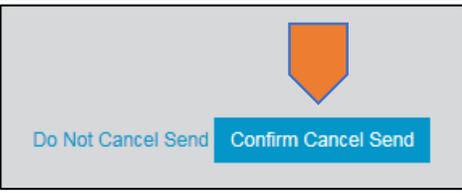
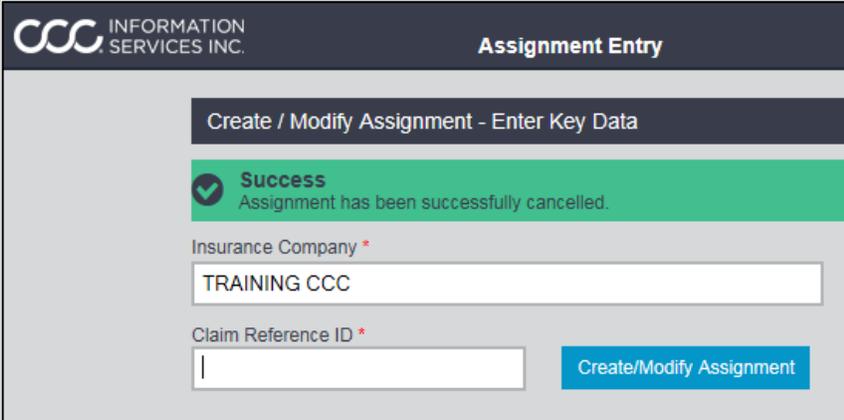
Step	Action
1	<p>Click the Results List Options link on the Search Results page. A popup window opens.</p> 
2	<p>If the box next to Show Claim Folder Links is unchecked, click on it and then click Apply & Save.</p> 
3	The Note icon is now visible.

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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

How to Cancel an Assignment

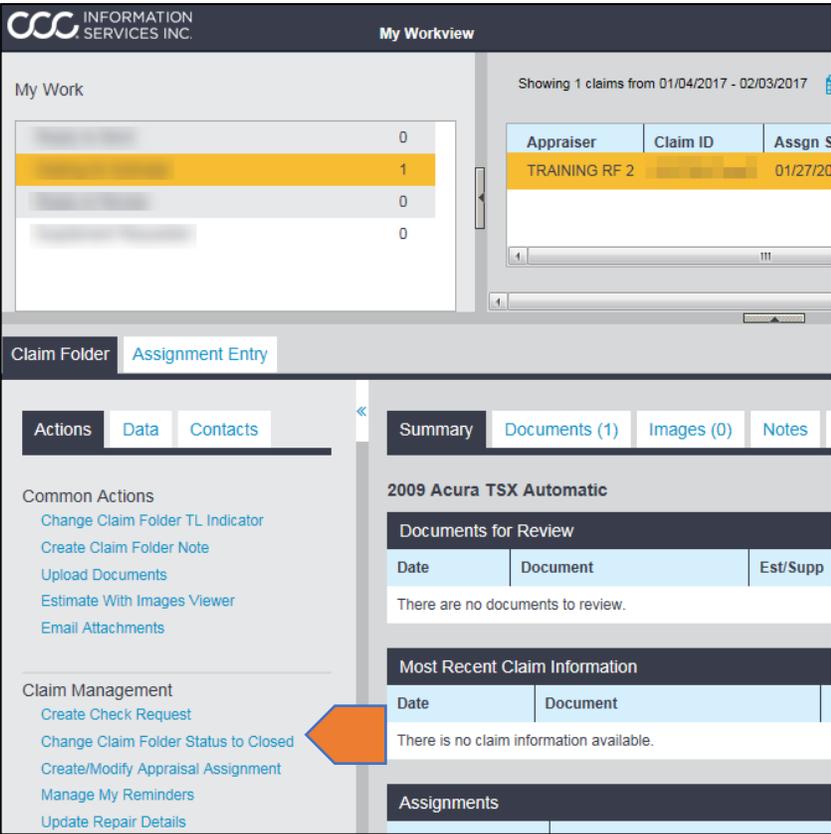
To cancel an assignment:

Step	Action
1	<p>Click the Cancel Send button at the bottom of the Assignment screen.</p> 
2	<p>Confirm the cancellation by clicking Confirm Cancel Send.</p> 
3	<p>A confirmation message appears:</p>  <p>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.</p> <p>However, if the assignment was not initially downloaded, no notification or message is sent.</p>

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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

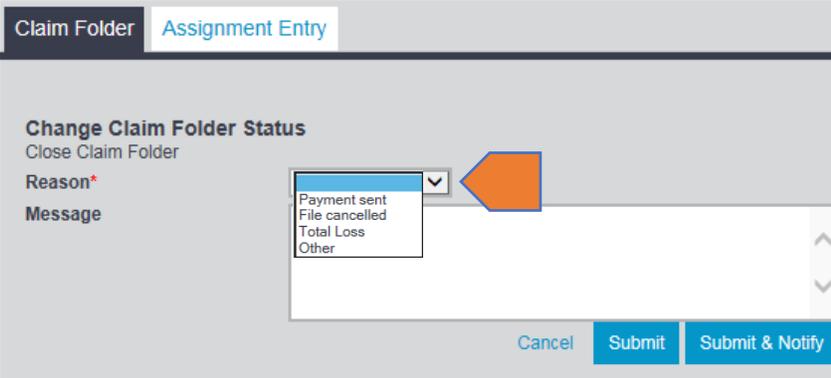
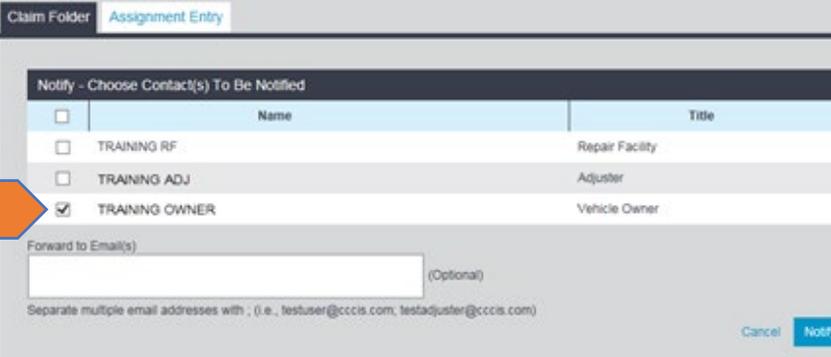
How to Close a Claim Folder To close a claim folder:

Step	Action
1	From My Workview , select the claim you want to close by clicking on it once to highlight it.
2	<p>Click the Change Claim Folder Status to Closed link under the Actions tab in the Claim Folder.</p>  <p>The screenshot shows the 'My Workview' interface with a list of claims. The second claim, 'TRAINING RF 2', is highlighted. Below the list, the 'Claim Folder' details are shown for '2009 Acura TSX Automatic'. The 'Actions' tab is active, and an orange arrow points to the 'Change Claim Folder Status to Closed' link.</p>

Continued on next page

CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

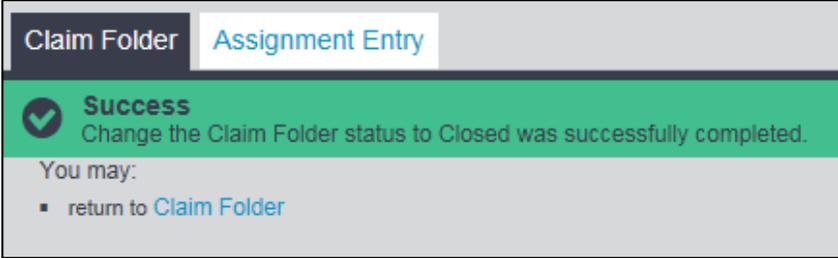
How to Close a Claim Folder,
continued

Step	Action
3	<p>Select a Reason from the dropdown menu (required) and enter any relevant notes in the Message field.</p> 
4	<p>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.</p>  <p>You can also manually enter email addresses. Multiple email addresses must be separated with a semicolon (;).</p>
5	<p>Click Notify when finished.</p> 

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CCC® Workflow – Claims Management: Using Configurable Worklists, Continued

How to Close a Claim Folder,
continued

Step	Action
6	<p>A confirmation message appears. You can now return to the Claim Folder.</p>  <p>Note: Columns in My Workview can be sorted and hidden. To sort a column's contents alphabetically, left click on that column's title.</p> <p>To hide a column, right click on any column's title, hover over Columns, and uncheck any columns you wish to hide.</p> 