

CCC® Estimate Share - Requesting a Workfile Copy - Second Repair Facility

Introduction

This job aid describes the process a repair facility uses to request a workfile copy for an Estimate of Record written by another repair facility.

Note: The original estimate line data will be available, but photos and other estimate-related data will not.

The Estimate Share feature can be used by both DRP repair facilities and Non-DRP (Open Shop) repair facilities.

Before You Begin

This workflow process requires that the first repair facility has written an Estimate of Record using the original insurance company claim assignment.

After requesting a Workfile Copy, a claim supplement assignment is automatically created when the second repair facility performs the **Import Workfile Copy** action using the claim number and workfile ID information from the original Estimate of Record written by the first repair facility.

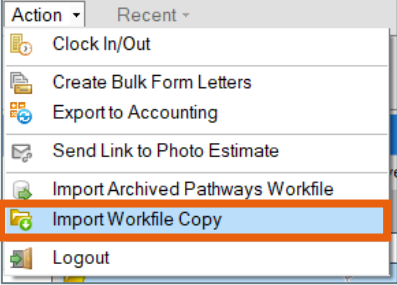
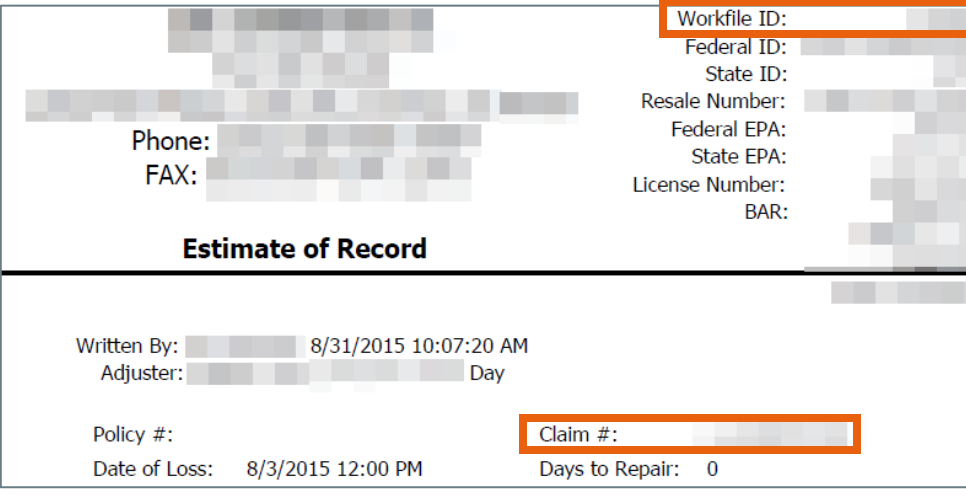
To view a list of insurance companies currently using Estimate Share, open CCC® Estimating Online Help and search for Estimate Share.

Continued on next page

CCC® Estimate Share - Requesting a Workfile Copy – Second Repair Facility, Continued

Requesting a Workfile Copy

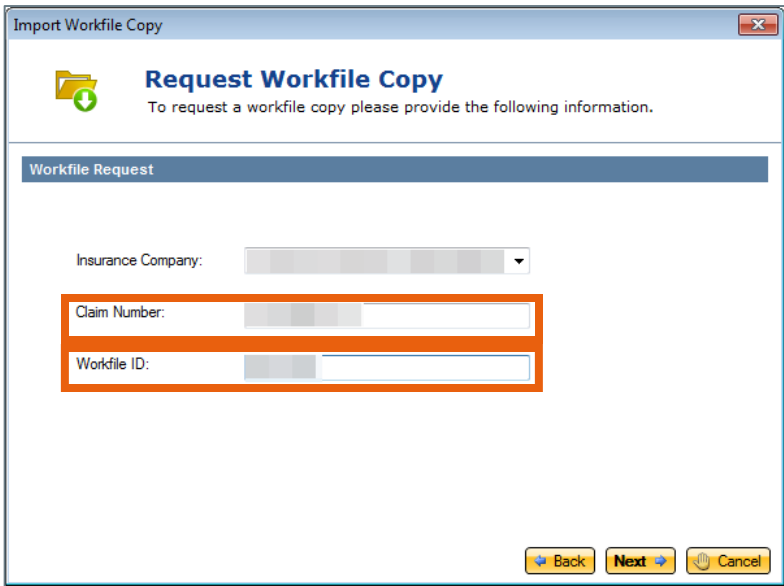
In this section, the repair facility must have a copy of the Estimate of Record from the first repair facility to perform the following steps.

Step	Action
1	Select Action and select Import Workfile Copy from the menu bar. The Select Workfile Source screen opens. 
2	Select the Download copy of workfile from CCC option, and then select Next . The Request Workfile Copy screen opens.
3	Select the insurance company from the Insurance Company drop-list.
4	Locate the Claim Number and Workfile ID on the Estimate of Record from the first repair facility.
 <p>The screenshot shows the 'Estimate of Record' form. On the right side, the 'Workfile ID' field is highlighted with an orange box. Below it, there are fields for Federal ID, State ID, Resale Number, Federal EPA, State EPA, License Number, and BAR. At the bottom of the form, the 'Claim #' field is also highlighted with an orange box. Other fields include 'Written By', 'Adjuster', 'Policy #', 'Date of Loss', and 'Days to Repair'.</p>	

Continued on next page

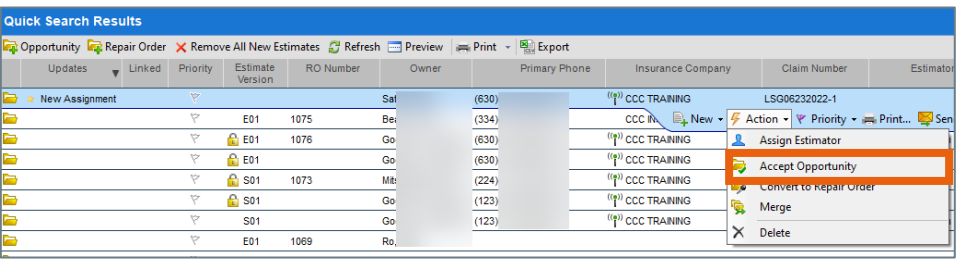
CCC® Estimate Share - Requesting a Workfile Copy – Second Repair Facility, Continued

Requesting a Workfile Copy, continued

Step	Action
5	Enter the Claim Number and Workfile ID in the appropriate fields on the screen.
	
6	Select Next , and then Finish . The Workfile Copy request is submitted to the insurance company.

Accept the Supplement Assignment and Write the Estimate

Follow the steps below after receiving the supplement assignment.

Step	Action
1	Select View > Workfiles from the menu bar.
2	Locate the Supplement Assignment and select Action > Accept Opportunity from the workfile mini toolbar.
	

Continued on next page

CCC® Estimate Share - Requesting a Workfile Copy - Second Repair Facility, Continued

Accept the Supplement Assignment and Write the Estimate,
continued

Step	Action
3	Create the claim office profile if prompted to do so.
4	Create and write the supplement, add attachments (i.e., images, documents) in the Attachment tab, and then select Lock Supplement in the Estimate tab. Note: You may be prompted to make changes before the estimate is locked. Review the flagged changes in the Advisor tab, then lock the estimate.

The screenshot shows the software interface with the 'Estimate' tab selected. The 'Lock Supplement' button is highlighted with a red box. Below the toolbar, the 'Estimate' tab contains a table of repair lines. The table has columns for 'A', 'N', '*', 'O', 'Est', 'Line', 'Oper', and a description. The 'Lock Supplement' button is located in the top toolbar, next to 'Estimate Properties', 'Rates and Rules', 'Line Operation', 'Delete Estimate', 'Retrieve RPS', 'Repairable', 'Total Loss', 'Checklist', and 'Checkout'.

A	N	*	O	Est	Line	Oper	Description
			<input type="checkbox"/>		6	Repl	Hood (HSS)
			<input type="checkbox"/>		7		Add for Clear Coat
			<input type="checkbox"/>		8		Add for Underside(Complete)
			<input type="checkbox"/>		9		Add for Clear Coat
			<input type="checkbox"/>		10		FENDER
			<input type="checkbox"/>		11	Repl	RT Fender (HSS)
			<input type="checkbox"/>		12		Overlap Major Adj. Panel
			<input type="checkbox"/>		13		Add for Clear Coat
			<input type="checkbox"/>		14		Add for Edging
			<input type="checkbox"/>		15		Add for Clear Coat
			<input type="checkbox"/>		16	Repl	LT Fender (HSS)
			<input type="checkbox"/>		17		Overlap Major Adj. Panel
			<input type="checkbox"/>		18		Add for Clear Coat
			<input type="checkbox"/>		19		Add for Edging
			<input type="checkbox"/>		20		Add for Clear Coat
			<input type="checkbox"/>				

Continued on next page

CCC® Estimate Share - Requesting a Workfile Copy - Second Repair Facility, Continued

Insurance Company Workflow Rules

The locked supplement is processed based on the insurance company's workflow rules, the results of which can be one of the following actions:

- The supplement is Auto Approved
 - The supplement is under Estimate Review; changes may be requested
 - The supplement warrants a Field Inspection
-