

# Using Estimate Review with CCC® Estimating

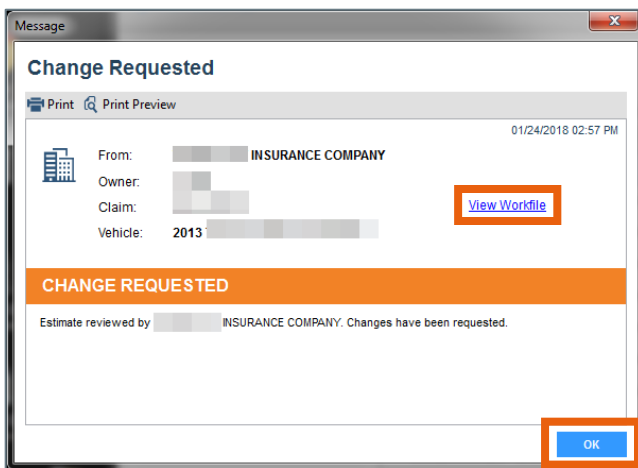
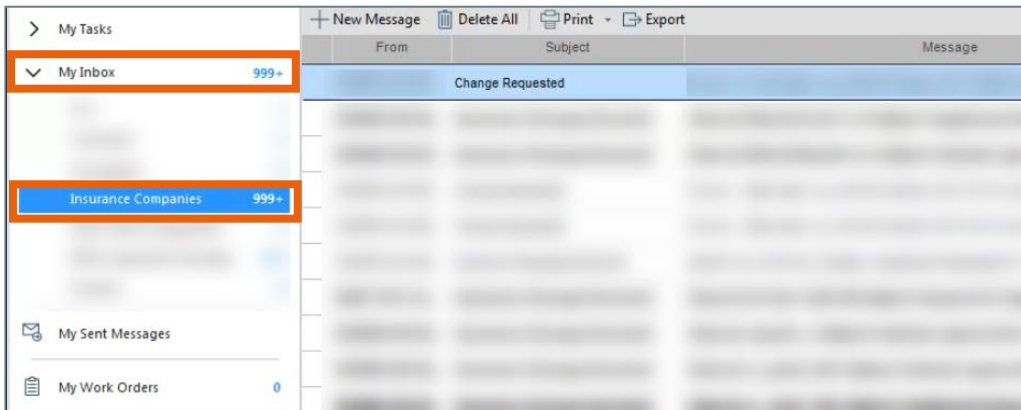
## Purpose

This job aid describes how to handle an insurer's **Change Request** asking for changes to an existing estimate or supplement.

## Insurance Company Sends Request

There are times when an insurer reviews a claim and wants changes to the existing estimate.

In these cases, the desk reviewer at the insurance company reviews the workfile and creates a **Change Request Insurance Message** when performing a reinspection. The message appears in **My Inbox > Insurance Companies** (see image below) and contains **Change Requested** as the subject line.



Double-clicking the message or clicking **View** in the mini-toolbar opens the Change Requested message window.

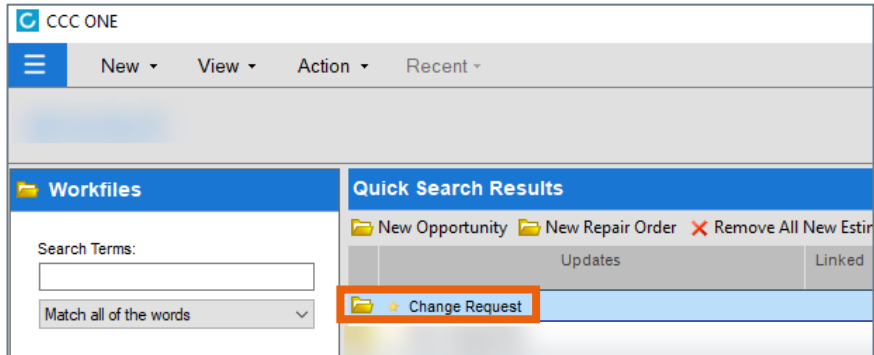
Click the **OK** button to close the window or click the **View Workfile** link to open the workfile.

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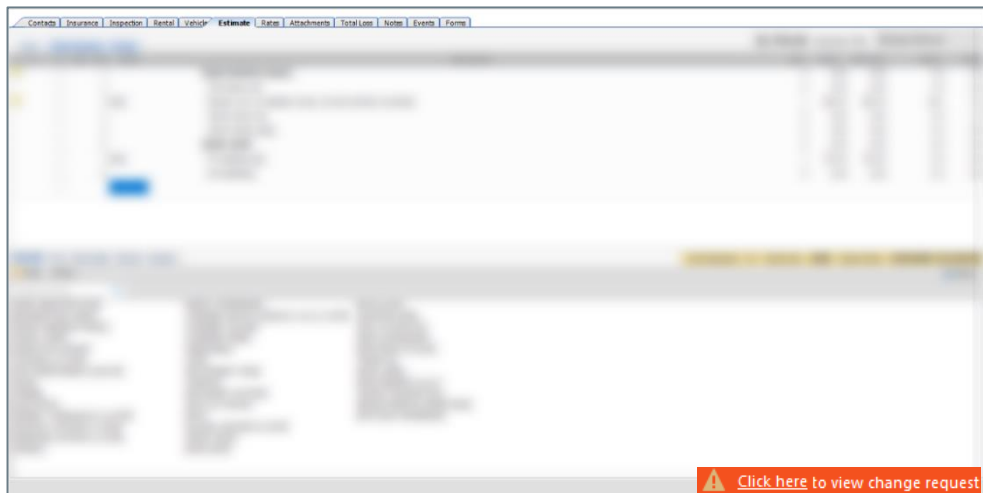
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### Change Request Workfile

**Change Requests** are also visible from the **Workfiles View**. **Change Request** is listed in the Updates column for the relevant Workfiles:



Open the workfile. To see the Change Request details, click the link in the **orange bar** at the bottom of the workfile:

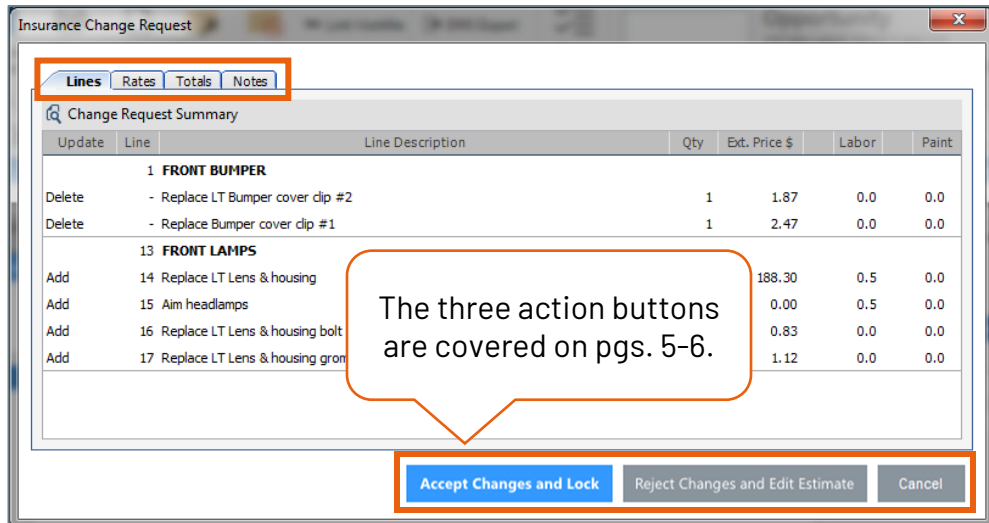


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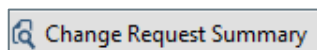
### View Change Request Tabs

Clicking the link in the orange bar opens the **Insurance Change Request** window, which contains four tabs: **Lines**, **Rates**, **Totals**, and **Notes**. Review each tab for details on the requested change(s).



Tab	Description
<b>Lines</b>	Lists any requested changes to specific estimate lines (pictured above).
<b>Rates</b>	Lists any rate changes.
<b>Totals</b>	Lists Estimate \$, Review \$, and Difference \$ totals for several categories. Click the + icon in the far left column to expand a category.
<b>Notes</b>	Contains any additional change requests or other information the insurer wants you to be aware of. Reviewer contact information may be available here.

Click the **Change Request Summary** button to view the details as a PDF (see next page for an example).

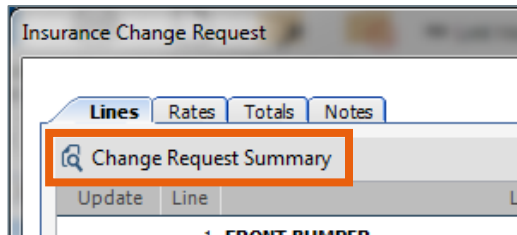


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## Using Estimate Review with CCC® Estimating, Continued

### Change Request Summary

Clicking the **Change Request Summary** button opens a multi-page PDF containing claim details and a summary of the requested changes in an easy-to-read format.



**Note:** The details that are displayed in this PDF are dependent upon the changes that were requested.

Line	Oper	Description	Part Number	Qty	Extended Price \$	Labor	Paint
<b>Deleted Items</b>							
6	Repl	LT Bumper cover clip #2	9046705090B1	1	-1.87		
<b>Added Items</b>							
1		<b>FRONT LAMPS</b>					
2	*	S01 Repl LT Lens & housing	8117012F10	1	188.30	1.0	
3	S01	Repl Aim headlamps				0.5	
4	S01	Repl LT Lens & housing bolt	9010906382	1	0.83		
5	S01	Repl LT Lens & housing screw	9015950388	1	0.83		
6	S01	Repl LT Lens & housing grommet	9018905142	1	1.12		
<b>SUBTOTALS</b>					<b>189.21</b>	<b>1.5</b>	<b>0.0</b>
<b>TOTALS SUMMARY</b>							
<b>Category</b>	<b>Basis</b>	<b>Rate</b>	<b>Cost \$</b>				
Parts			11				
Body Labor	1.5 hrs @	\$ 65.00 /hr	1				
Subtotal			31				
Sales Tax	\$ 305.63 @	8.7500 %	.				
<b>Total Supplement Amount</b>			<b>33</b>				
<b>NET COST OF SUPPLEMENT</b>			<b>33</b>				



Use the **forward arrow** within the PDF to review all pages of the Change Request Summary PDF.

Print or save the PDF as needed. Once viewed, this document will be saved to the Documents section of the workfile.

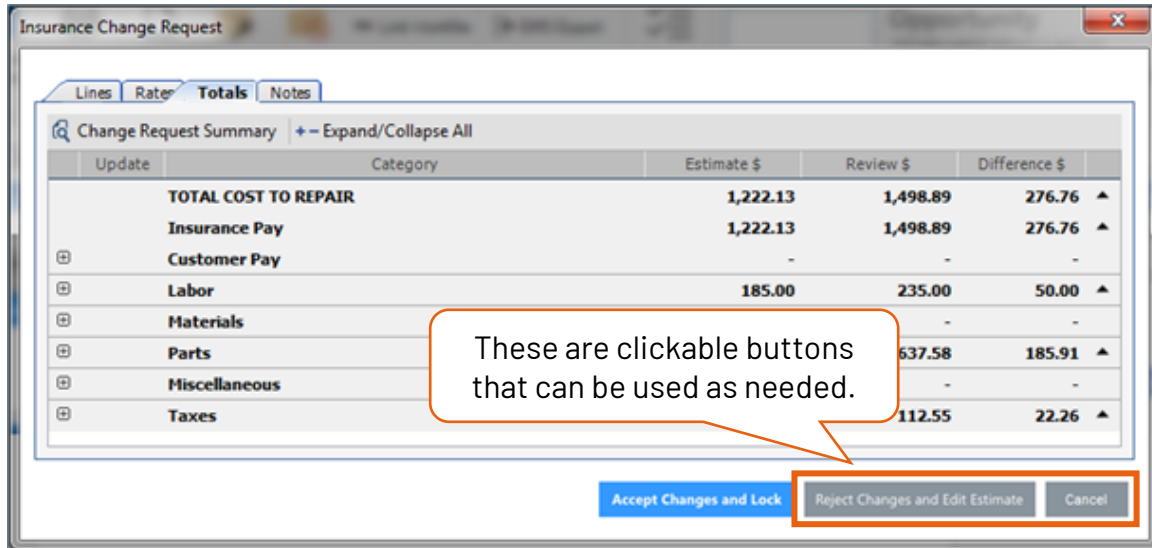
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## Using Estimate Review with CCC® Estimating, Continued

### Insurance Change Request Options

Once you have reviewed the requested changes, you have three action options in the Insurance Change Request popup: **Accept Changes and Lock**, **Reject Changes and Edit Estimate**, and **Cancel**.

**Note:** Although **Reject Changes and Edit Estimate** and **Cancel** are grey buttons, they are clickable buttons that can be used as needed.



Button	Action
<b>Accept Changes and Lock</b>	A supplement is created with the requested changes and the workfile is automatically communicated back to the insurer.
<b>Cancel</b>	The Change Request form closes, but it will be available to reopen if you need to review it again. Attempting to create a supplement will reopen the Change Request window until the request has been addressed.


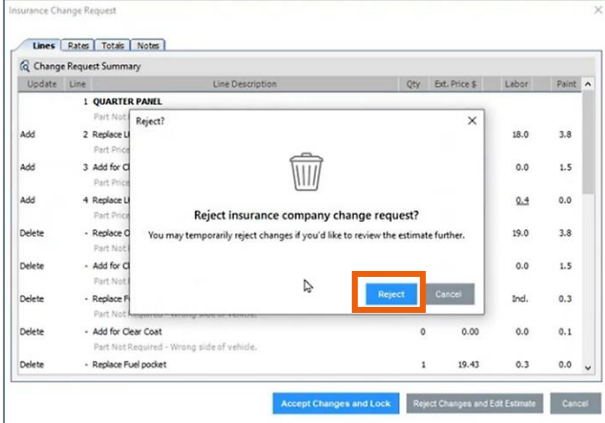
**Note:** If you have already started a supplement for this claim, clicking **Accept Changes and Lock** replaces the existing preliminary supplement and locks the Change Request workfile as the supplement.

In this case, you see a prompt asking you to approve the action in order for it to process. The supplement following the Change Request will be recorded as a direct response, which is why you will only want to address those items.

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## Using Estimate Review with CCC® Estimating, Continued

**Insurance Change Request Options,** continued The table below reviews the **Reject Changes and Edit Estimate** process.

Step	Action
1	Click on the <b>Create Supplement</b> button on the header of the workfile and the change request window will appear.
2	Click <b>Reject Changes and Edit Estimate</b> button. 
3	A confirmation screen displays. Click <b>Reject</b> . 
4	Create and complete a supplement on your workfile following your normal procedures. The change request will remain active on the workfile until your supplement has been locked and uploaded.

**Note:** If you have already started a supplement for this claim prior to receiving the change request and you are choosing to reject the changes you should complete your supplement following your normal procedures.

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