



## Central Review Redlining

The Central Review feature became available in the CCC ONE Estimating 5.9 release. Users with this feature can create and customize up to 31 Central Review queues in [cccone.com](http://cccone.com). Once configured, when users lock an estimate, it goes through the company's own API, (Application Programming Interface), and returns with information on which queue it should route to.

In the CCC ONE Estimating 6.2 release, **Central Review Redlining** was added to provide reviewers the ability to redline items on an estimate sent to Central Review.

**Reviewers** have the ability to:

- Approve estimates without changes
- Lock estimates with or without changes
- Return workfiles to estimators as a change request

**Estimators** can choose to accept or reject the changes made by the reviewer.

There are 2 client features that need to be enabled by **CCC** before you can use the **Central Review Redlining** feature:

- **Enable Central Review API** - this is available since the 5.9 release and higher
- **Enable Central Review Redlining** - this is available in release 6.2 and higher

Once these features are enabled, users with admin rights will need to add additional tags and **Note Types** in the repairer profile.

### To add additional Central Review Note Types

1. Navigate to **Configure > Profiles** from the menu bar.
2. Open the **Repairer** profile and click on **Note Types** under Basic Settings.
3. Select **Edit** from the toolbar. The Note Types screen opens.
4. Select **Add** from the toolbar.
5. Select **Estimate Review** from the **Category** droplist, and then enter a description in the **Type** field. Suggested Type descriptions Missing Damage, Carrier Regulation, Company Policy, etc.
6. Select or deselect the **Active** option (default), and then click **OK**.
7. Click **Yes** to close the screen, and then select **Save** or **Save and Close**.



## Setting Up Rules for Central Review

This feature provides the ability for you to set up rules for individual insurance companies, and to add threshold values for estimate amount and Advisor score. Once rule are configured by insurance company, then estimates that trigger the rule are then routed to the specified estimator for review.

### To set up rules for Central Review

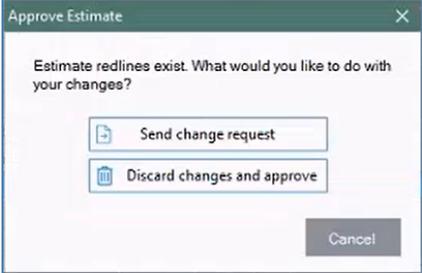
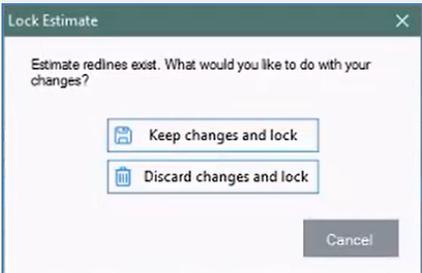
1. Select **Configure > Profiles** from the menu bar.
2. Select your repair facility profile, and then select **Edit** from the mini-toolbar.
3. Click on the **Central Review** link under Repair Management.
4. From the Insurance Company Rules section, select **Add** from the toolbar. The Insurance Company Rule screen opens.
5. Select an insurance company from the **Select an insurance company** droplist. Alternately, enter the first few letters of the insurance company in the field.
6. Enter a numeric a value for Advisor score and estimate amount in the fields, and then click **OK**.
7. From the Estimator Rules section, select **Add** from the toolbar. The Estimator Rule screen opens.
8. Select an estimator from the **Select an estimator** droplist. Alternately, enter the first few letters of the estimator in the field.
9. Enter a numeric a value for Advisor score and estimate amount in the fields, and then click **OK**. If no values are entered, then all estimates are routed to the specified estimator for review.
10. Select **Save** or **Save and Close** to save your profile changes.

## Starting a Review and Making Changes on a Workfile

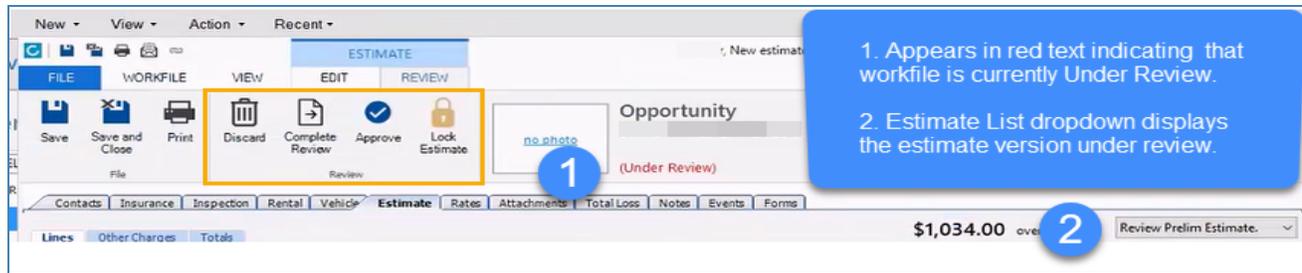
Once Central Review has been setup, designated reviewers can perform reviews on workfiles:

- In the Central Review Dashboard by clicking on the workfile, then selecting **Start Review** from the mini-toolbar
- Start a review directly in the workfile **Estimate** tab > **Review** tab >, then click the **Start** action

When a workfile is opened in Review mode, a **REVIEW** tab displays with actions related to reviewing the workfile.

Action / Button	Description	
<b>Start</b>	When selected, puts the selected workfile estimate in Review mode.	
<b>Discard</b>	Appears after a user clicks on <b>Start</b> . When selected, all reviewer changes are removed and the review mode estimate version is discarded.	
<b>Complete Review</b>	Saves reviewer changes and sets the workfile status as <b>Reviewed</b> . This action is enabled after the review is started.	
<b>Approve</b>	Enabled after review is started. When selected: <ul style="list-style-type: none"> <li>» If no changes were made, sets the workfile status to <b>Approved</b> and sends it back to the estimator to lock the estimate.</li> <li>» If reviewer changes are made, then an <b>Approve Estimate</b> popup message displays. Reviewer can choose:               <ul style="list-style-type: none"> <li>• <b>Send change request</b> - Estimate is returned to the estimator with requested changes</li> <li>• <b>Discard changes and approve</b> - All reviewer changes are removed and the workfile is restored to its original submission</li> </ul> </li> </ul>	
<b>Lock Estimate</b>	<ul style="list-style-type: none"> <li>» If no changes were made, this action locks the estimate.</li> <li>» If reviewer changes are made, then a <b>Lock Estimate</b> popup message displays. Reviewer can choose:               <ul style="list-style-type: none"> <li>• <b>Keep changes and lock</b> - Estimate is returned to the estimator with requested changes</li> <li>• <b>Discard changes and lock</b> - All reviewer changes are removed and the workfile is restored to its original submission</li> </ul> </li> </ul>	

To indicate the workfile is in Review mode, the workfile displays **(Under Review)** in red text and the estimate version being reviewed is displayed in the Estimate List droplist. For example, a preliminary estimate being reviewed is displayed as "Review Preliminary Estimate" in the Estimate List.



### To start a review on a workfile in the Central Review dashboard

1. Open the Central Review dashboard and select one of the queues in the left panel. Workfiles to be reviewed are displayed.
2. Double-click the workfile to open it, then click on the **Estimate** tab > **Review** tab and click on **Start**. The workfile opens in Review mode.

- or -

On the selected workfile, select **Start Review** from the workfile mini-toolbar. The workfile opens in Review mode.

**Note:** Alternately, open the workfile to be reviewed, click on the **Estimate** tab > **Review** tab, and then click **Start**.

### Making Estimate Changes

While in Review mode, reviewers can add, delete, and make changes to the estimate lines and rates. Simply make the changes to the estimate, then select one of the actions from the Review tab, (e.g., Discard, Complete Review, Approve, or Lock Estimate).



## Making Requested Changes to a Reviewed Estimate

Estimates that have request changes appear in the My Work Dashboard by selecting the My Estimates Action required option.

### To make changes to a reviewed estimate

1. Select **Dashboards** and then select the **My Work** Dashboard from the menu bar.
2. Click on the **My Estimates Action Required** option. Estimates requiring changes appear in the search results pane.
3. Select the estimate, and then select **View** from the mini-toolbar. The estimate workfile screen opens.
4. Select the **Estimate** tab, and then select the **Lines** tab.
5. Select the **Review** tab in the database panel.
6. Review and make changes for each estimate line requested.
7. Select **Save** or **Save and Close** from the toolbar.