

CCC® Estimate Share - Requesting an Estimate Share from an Insurance Staff Appraiser

Introduction

This job aid describes the process a repair facility with CCC® Estimating uses to request a workfile copy of an Estimate of Record written by the insurance company staff appraiser. This job aid also explains how a repair facility can add additional notes to a supplement.

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

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

Open Shop assignments are indicated by a green star next to the Insurance Company. 

Before You Begin

This workflow process requires that the insurance company staff appraiser has completed an Estimate of Record.

After requesting a Workfile Copy, a supplement assignment is automatically created when the 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 staff appraiser.

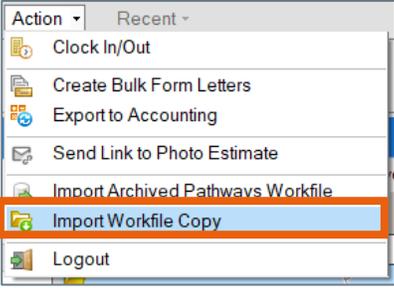
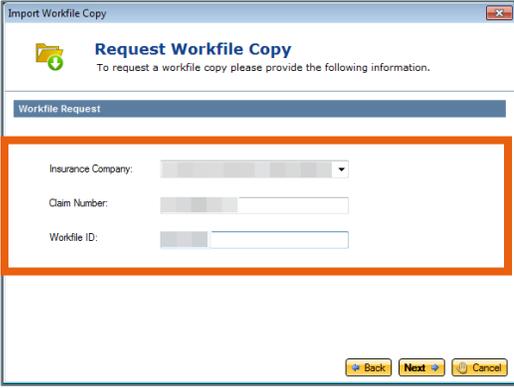
To view a list of insurance companies currently using Estimate Share, open CCC® Estimating Online Help and search for Estimate Share.

Continued on next page

CCC® Estimate Share - Requesting an Estimate Share from an Insurance Staff Appraiser, Continued

Requesting an Estimate Share workfile

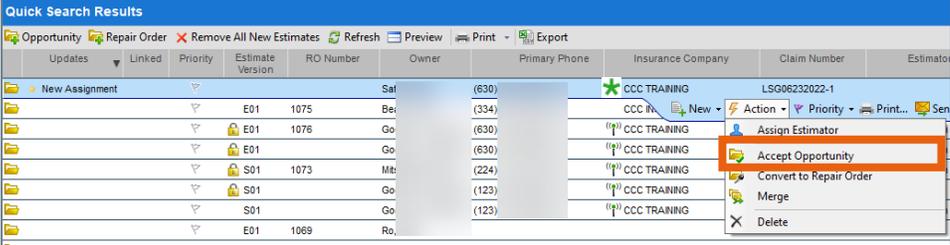
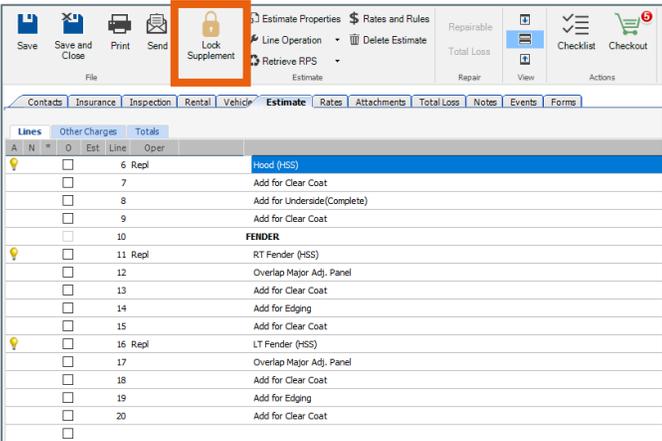
In this section, the repair facility must have a copy of the Estimate of Record from the staff appraiser to perform the following steps.

Step	Action
1	<p>Select Action > Import Workfile Copy from the menu bar. The Select Workfile Source screen opens.</p> 
2	<p>Locate the claim number and workfile ID on the Estimate of Record written by the staff appraiser.</p> 
3	<p>Select the Download copy of workfile from CCC option, and then select Next. The Request Workfile Copy screen opens.</p>
4	<p>Select the insurance company from the drop-list, then enter the Claim Number and Workfile ID in the appropriate fields.</p> 
5	<p>Select Next, and then Finish. The Workfile Copy request is submitted to the insurance company.</p>

Continued on next page

CCC® Estimate Share - Requesting an Estimate Share from an Insurance Staff Appraiser, Continued

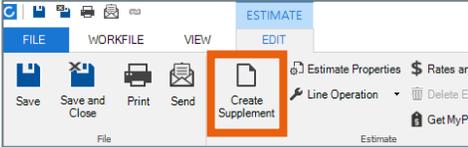
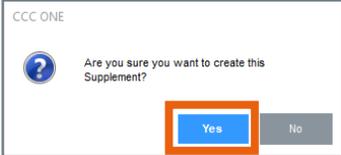
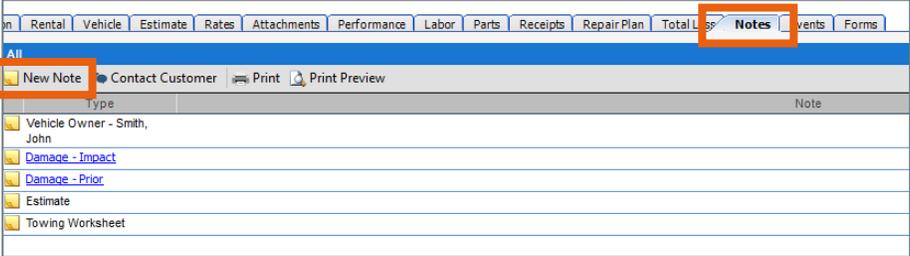
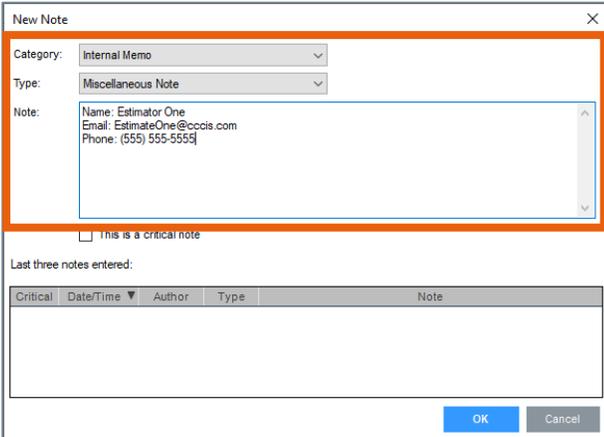
Accept and Write the Supplement

Step	Action
1	Select View > Workfiles from the menu bar.
2	<p>Locate the Supplement Assignment, and select Action > Accept Opportunity from the workfile mini toolbar.</p> <p>Open Shop assignments are indicated by a green star next to the insurance company name. </p> 
3	Create the claim office profile if prompted to do so.
4	<p>Create and write the supplement, add attachments (i.e., images, documents) in the Attachments tab, and then select Lock Supplement.</p> <p>Note: You may be prompted to make changes before the supplement is locked. Review the flagged estimate lines in the Advisor tab, make changes, and then lock the supplement.</p> 
5	The locked supplement is processed based on the insurance company's workflow rules.

Continued on next page

CCC® Estimate Share - Requesting an Estimate Share from an Insurance Staff Appraiser, Continued

Add Reviewer Information Follow the steps below to add Reviewer information to the **Notes** tab when creating a review.

Step	Action
1	Click Create Supplement . A pop-up window displays. 
2	Click Yes . 
3	Click on the Notes tab, then select New Note . The New Note window appears. 
4	Select a Category and Type from the drop-down menus. Then, type in the Reviewer's information in the Note field. 

Continued on next page

CCC® Estimate Share - Requesting an Estimate Share from an Insurance Staff Appraiser, Continued

Add Reviewer Information,
continued

Step	Action
5	<p>Click OK. The new note is added to the Notes section.</p> 