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. 法
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[®] is a trademark of CCC Intelligent Solutions Inc. All rights reserved. CCC[®] is a trademark of CCC Intelligent Solutions Inc.

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

Requesting an Estimate	In this section, the repair facility must have a copy of the Estimate of Record from the staff appraiser to perform the following steps.					
Share	Step	Action				
workfile	1	Select Action > Import Workfile Copy from the menu bar. The Select Workfile Source screen opens.				
		Clock In/Out Create Bulk Form Letters Export to Accounting Send Link to Photo Estimate				
		Import Archived Pathways Workfile Import Workfile Copy Logout				
	2	Locate the claim number and workfile ID on the Estimate of Record written by the staff appraiser.				
		Claim #: Workfile ID:				
		Estimate of Record				
	3	Select the Download copy of workfile from CCC option, and then select Next . The Request Workfile Copy screen opens.				
	4	Select the insurance company from the drop-list, then enter the Claim Number and Workfile ID in the appropriate fields.				
		Import Workfile Copy Request Workfile Copy To request a workfile copy please provide the following information. Workfile Request				
		Insurance Company:				
		Read Read Cancel				
	5	Select Next , and then Finish . The Workfile Copy request is submitted to the insurance company.				

Continued on next page

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

Accept and	Step	Action				
Write the	1	Select View > Workfiles from the menu bar.				
Supplement	2	Locate the Supplement Assignment, and select Action > Accept Opportunity from the workfile mini toolbar.				
		Open Shop assignments are indicated by a green star next to the insurance company name. 🔀				
		Oulck Search Results Work Search Results Updates Linked Priority Estimate Refresh Preview Primary Phone Insurance Company Claim Number Estimato Work Assignment V Sat (630) CCC TRANNO LSG0622002.1 V E01 1075 Ber (334) CCC TRANNO LSG0622002.1 V E01 1076 Go (630) 0°1° CCC TRANNO Assign Estimator V E01 1076 Go (630) 0°1° CCC TRANNO Assign Estimator V E01 1076 Go (630) 0°1° CCC TRANNO Assign Estimator V E01 1076 Go (630) 0°1° CCC TRANNO Assign Estimator V E01 1076 Go (630) 0°1° CCC TRANNO Assign Estimator V E01 1076 Go (123) 0°1° CCC TRANNO Accept Opportunity V E01 0Go (123) 0°1° CCC TRANNO Version Version V E01 1069 Ro				
	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 Attachments tab, and then select Lock Supplement . 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.				
		N U Disk Hood (HSS) ○ 6 Repi Hood (HSS) ○ 7 Add for Uharrad(Campleta) ○ 9 Add for Uharrad(Campleta) ○ 9 Add for Uharrad(Campleta) ○ 9 Add for Uharrad(Campleta) ○ 10 FHDER ○ 11 Repl RT Fender (HSS) ○ 12 Overlap Major Agi, Panel ○ 13 Add for Clear Cast ○ 14 Add for Clear Cast ○ 15 Add for Clear Cast ○ 16 Repl UT Fender (HSS) ○ 16 Repl UT Fender (HSS) ○ 17 Overlap Major Agi, Panel ○ 18 Add for Clear Cast ○ 18 Add for Clear Cast ○ 19 Add for Clear Cast ○ 20 Add for Clear Cast				
	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
 Follow the steps below to add Reviewer information to the Notes tab when creating a review.

 Step
 Action

Step	Action					
1	Click Create Supplement . A pop-up window displays.					
	Image: Save and Close Print Send ESTIMATE Save Save and Close Print Send Image: Save Save and Close Print File File Estimate Properties Rates an					
2	Click Yes .					
	CCC ONE					
	Are you sure you want to create this Supplement?					
	Yes No					
3	Click on the Notes tab, then select New Note . The New Note					
	window appears.					
	n Rental Vehicle Estimate Rates Attachments Performance Labor Parts Receipts Repair Plan TotalL s Notes vents Forms					
	All Sew Note Contact Customer 🚔 Print 🗋 Print Preview					
	Type Note Vehicle Owner - Smith, John					
	Damage - Impact Damage - Prior					
	Estimate Towing Worksheet					
	Colort a O ota name and T ampa frame the duan datum meaning. Then					
4	type in the Reviewer's information in the Note field					
	New Note X					
	Category: Internal Memo					
	Type: Miscellaneous Note V					
	Note: Istimator One Email: Estimator Dee@cccis.com Phone: (555) 555-5555					
	This is a critical note					
	Last three notes entered: Critical Date/Time V Author Type Note					
	OK Cancel					
	•					

Continued on next page

CCC[®] is a trademark of CCC Intelligent Solutions Inc. All rights reserved. CCC[®] is a trademark of CCC Intelligent Solutions Inc.

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

Add Reviewer	Step	Action				
Information , continued	5	Click OK.	The new note is add	led to the Notes s ts Receipts TotalLoge [®] Notes Events Form Note	Date/Time V Author 7/31/2023 8:26 AM Shop Estimator	Category Internal Memo

