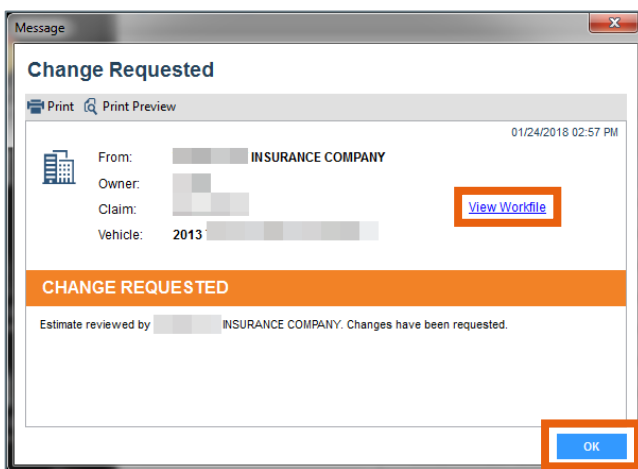
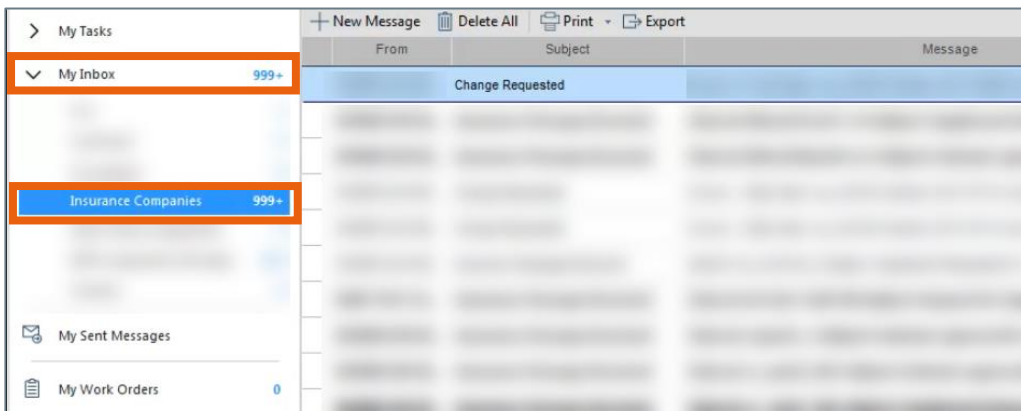


Using Estimate Review with CCC® Estimating

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.

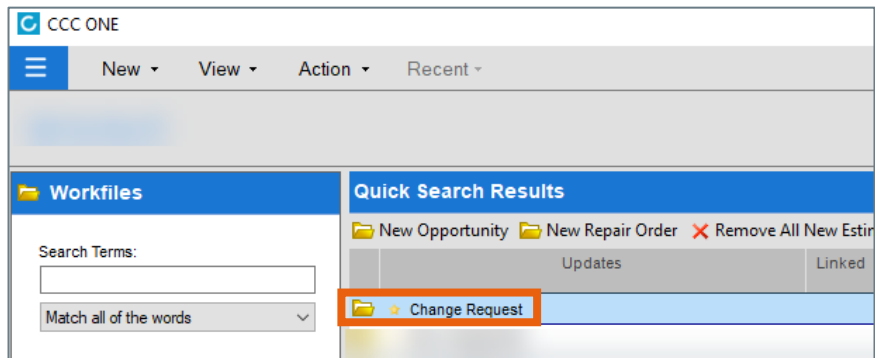
Click the **OK** button to close the window or click the **View Workfile** link to open the workfile.

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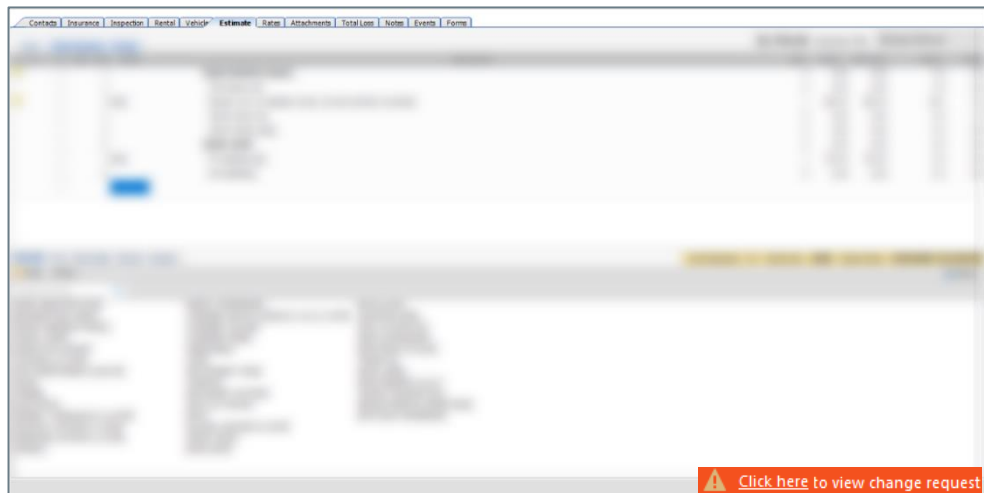
Using Estimate Review with CCC® Estimating, Continued

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:

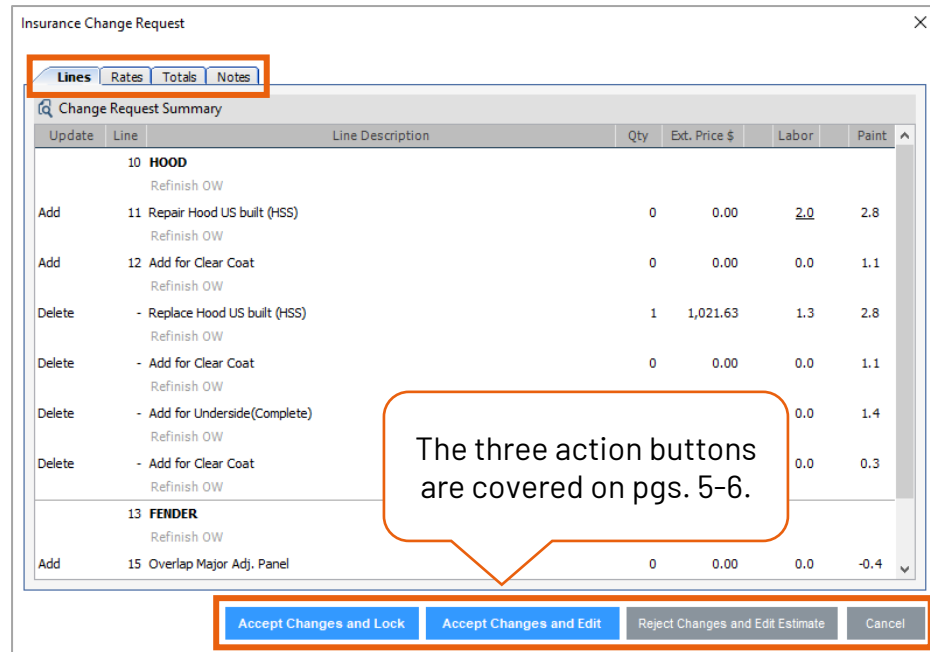


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Using Estimate Review with CCC® Estimating, Continued

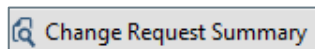
View Change Request Tabs

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
Lines	Lists any requested changes to specific estimate lines (pictured above).
Rates	Lists any rate changes.
Totals	Lists Estimate \$, Review \$, and Difference \$ totals for several categories. Click the + icon in the far left column to expand a category.
Notes	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).

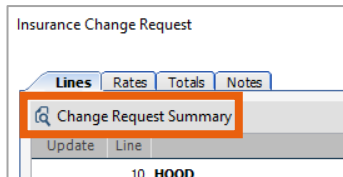


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Using Estimate Review with CCC® Estimating, Continued

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
Deleted Items							
6	Repl	LT Bumper cover clip #2	9046705090B1	1	-1.87		
Added Items							
1	FRONT LAMPS						
2	*	S01 Repl LT Lens & housing	8117012F10	1	188.30	1.0	
3		S01 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		
SUBTOTALS					189.21	1.5	0.0
TOTALS SUMMARY							
Category	Basis	Rate	Cost \$				
Parts			11				
Body Labor	1.5 hrs @	\$ 65.00 /hr	1				
Subtotal			31				
Sales Tax	\$ 305.63 @	8.7500 %	:				
Total Supplement Amount			33				
NET COST OF SUPPLEMENT			33				



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

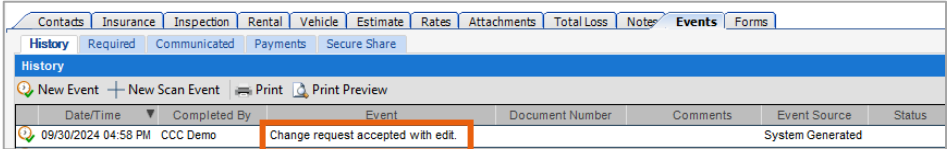
Once you have reviewed the requested changes, you have three action options in the Insurance Change Request popup: **Accept Changes and Lock**, **Reject Changes and Edit Estimate**, and **Cancel**.

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

The screenshot shows the 'Insurance Change Request' window with a table of costs and four action buttons at the bottom. A callout box points to the buttons, stating: 'These are clickable buttons that can be used as needed.'

Update	Category	Estimate \$	Review \$	Difference \$
	TOTAL COST TO REPAIR	1,222.13	1,498.89	276.76 ▲
	Insurance Pay	1,222.13	1,498.89	276.76 ▲
	Customer Pay	-	-	-
	Labor			50.00 ▲
	Materials			-
	Parts			35.91 ▲
	Miscellaneous			-
	Taxes	90.29		22.26 ▲

Buttons: Accept Changes and Lock, Accept Changes and Edit, Reject Changes and Edit Estimate, Cancel

Button	Action
Accept Changes and Lock	A supplement is created with the requested changes and the workfile is automatically communicated back to the insurer.
Accept Changes and Edit	A supplement is created with the requested changes are made to the workfile without being required to lock the workfile, this will be added to the workfile Event history. 
Cancel	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.

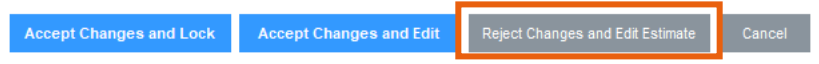
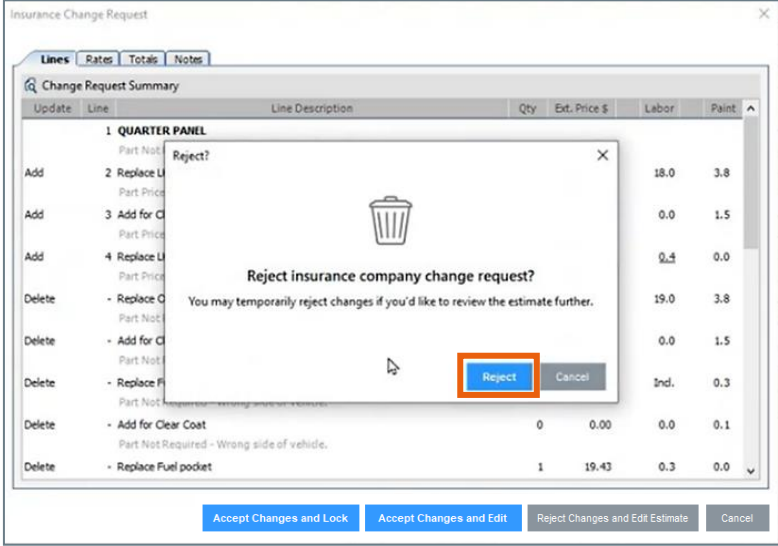
The screenshot shows the 'Insurance Change Request' window with a warning message: 'This insurance change request was created prior to your draft supplement. Accepting changes will overwrite your supplement.'

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, The table below reviews the **Reject Changes and Edit Estimate** process.
continued

Step	Action
1	Click on the Create Supplement button on the header of the workfile and the change request window will appear.
2	Click Reject Changes and Edit Estimate button. 
3	A confirmation screen displays. Click Reject . 
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.