Using Estimate Review with CCC° Estimating

PurposeThis job aid describes how to handle an insurer's Change Request
asking for changes to an existing estimate or supplement.Insurance
Company
Sends RequestThere are times when an insurer reviews a claim and wants changes to
the existing estimate.

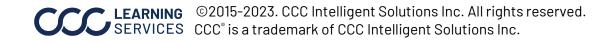
In these cases, the desk reviewer at the insurance company reviews the workfile and creates a **Change Request Insurance Message** when performing a reinspection. The message appears in **My Inbox > Insurance Companies** (see image below) and contains **Change Requested** as the subject line.

> My Tasks		+ New Message 📋 Delete All 🔤 Print 👻 🖂		📋 Delete All 🛛 🖶 Print 👻 🕞 Exp	prt
	,		From	Subject	Message
~	My Inbox	999+		Change Requested	
	Insurance Companies	999+	-		
			-		
			-		
M	My Sent Messages				
Ê	My Work Orders	0			

Mes	ssage	-		×
c	Chang	je Requ	ested	
1	Print (🗧 Print Previe	ew	
	Ē	From: Owner: Claim: Vehicle:	INSURANCE COMPANY	01/24/2018 02:57 PM orkfile
		IGE REQU	JESTED INSURANCE COMPANY. Changes have been requested.	ок

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.

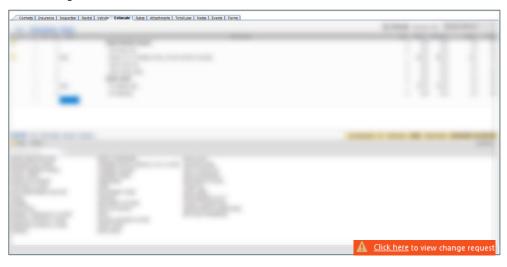


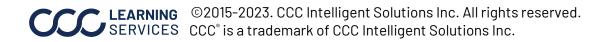
Using Estimate Review with CCC° Estimating, Continued

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

C CCC ONE	
E New - View - Actio	n - Recent -
🖨 Workfiles	Quick Search Results
Quark Town	눧 New Opportunity 눧 New Repair Order 🗙 Remove All New Estir
Search Terms:	Updates Linked
Match all of the words \checkmark	📄 🔹 Change Request

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





Using Estimate Review with CCC° Estimating, Continued

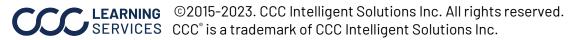
View Change Request Tabs Clicking the link in the orange bar opens the **Insurance Change Request** window, which contains four tabs: **Lines, Rates, Totals, and Notes**. Review each tab for details on the requested change(s).

surance Char	nge Re	quest	un Pritar 28		Care	Plant's	×
Lines	Rates	Totals Notes					
🛱 Change	e Requ	est Summary					
Update	Line		Line Description	Qty	Ext. Price \$	Labor	Paint
	1	FRONT BUMPER					
Delete	-	Replace LT Bumper cover clip #2		1	1.87	0.0	0.0
Delete	-	Replace Bumper cover clip #1		1	2.47	0.0	0.0
	13	FRONT LAMPS			~		
Add	14	Replace LT Lens & housing			188.30	0.5	0.0
Add	15	Aim headlamps	The three action butt	ons	0.00	0.5	0.0
Add	16	Replace LT Lens & housing bolt	are covered on ngo		0.83	0.0	0.0
Add	17	Replace LT Lens & housing grom	are covered on pgs. §	o-o.	1.12	0.0	0.0
			Accept Changes and Lock Reject	t Chang	ges and Edit Esti	mate	Cancel

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.

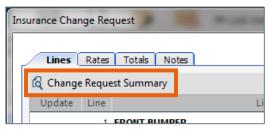
Click the **Change Request Summary** button to view the details as a PDF (see next page for an example).

🛱 Change Request Summary



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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.



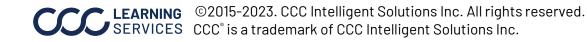
Note: The details that are displayed in this PDF are dependent upon the changes that were requested.

		Customer:								
				SUPPL	EMENT SUMMARY					
Line			Oper	Description	Part Number	Qty	Extended Price \$	Labor	Paint	
elet	ed Items									
6			Repl	LTBumper cover clip #2	9046705090B1	1	-1.87			
ddeo	Items									
1	FRONT	LAMPS	5							
2	*	501	Repl	LTLens & housing	8117012F10	1	188.30	1.0		
3		501		Aim headlamps				0.5		
4		501	Repl	LTLens &housing bolt	9010906382	1	0.83			
5		501	Repl	LTLens & housing screw	9015950388	1	0.83			
6		501	Repl	LTLens &housing grommet	9018905142	1	1.12			
					SUBTOTALS		189.21	1.5	0.0	
				TOTALS SUMMARY						
				Category		Bas	is	Rate	Cost \$	
				Parts					1	
				Body Labor		1.5 h	rs @	\$ 65.00 /hr	1	
				Subtotal					3(
				Sales Tax		\$ 305.6	i3 @	8.7500 %		
				Total Supplement Amount					33	
				NET COST OF SUPPLEMENT					33	

Print Preview				
🛃 🗋 🔍 Zoom 👻 🚺	1	of 3 🗼	M	🗙 Close

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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Insurance Change	Once you have reviewed the requested changes, you have three action options in the Insurance Change Request popup : Accept Changes and Lock , Reject
Request	Changes and Edit Estimate, and Cancel.
Options	Note: Although Reject Changes and Edit Estimate and Cancel are grey buttons, they are clickable buttons that can be used as needed.

Change R	equest Summary +- Expand/Co	ollapse All				
Update	Cat	egory	Estimate \$	Review \$	Difference \$	
	TOTAL COST TO REPAIR		1,222.13	1,498.89	276.76	٠
	Insurance Pay		1,222.13	1,498.89	276.76	٠
Ð	Customer Pay			-	-	
Ð	Labor		185.00	235.00	50.00	٠
Ð	Materials			-	-	
Ð	Parts	These a	ire clickable butto	ns 637.58	185.91	٠
Ð	Miscellaneous	that car	n be used as neede	ed	-	
Ð	Taxes			112.55	22.26	٠

Button	Action
Accept Changes and Lock	A supplement is created with the requested changes and the workfile is automatically communicated back to the insurer.
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.

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.

Continued on next page



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

Continued on next page



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