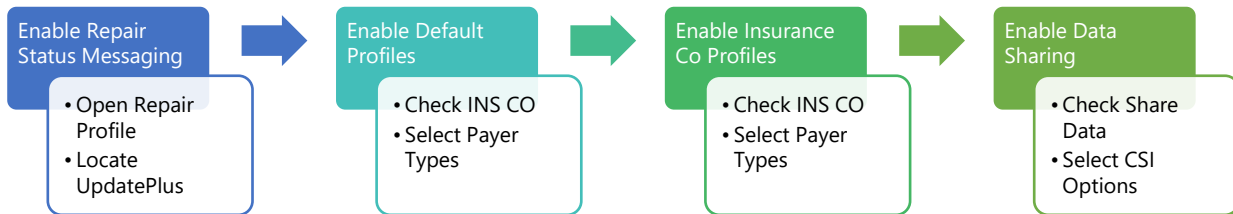


Job Aid: CCC® UpdatePlus Settings

Overview

This document describes how to enable and set up CCC® UpdatePlus to provide real time status updates to your customers via email or SMS text message (Repair Status). UpdatePlus settings allow you to enable data sharing with specified insurance companies for CSI surveys.

UpdatePlus settings are found on www.cccone.com and can be accessed via CCC® Estimating or Repair Workflow or directly from the web. Messaging (Repair Status, Appointments) and Web View settings are all available from this site or within Repair Workflow. The general process is shown below.



The remainder of this job aid walks through each step of the general process.

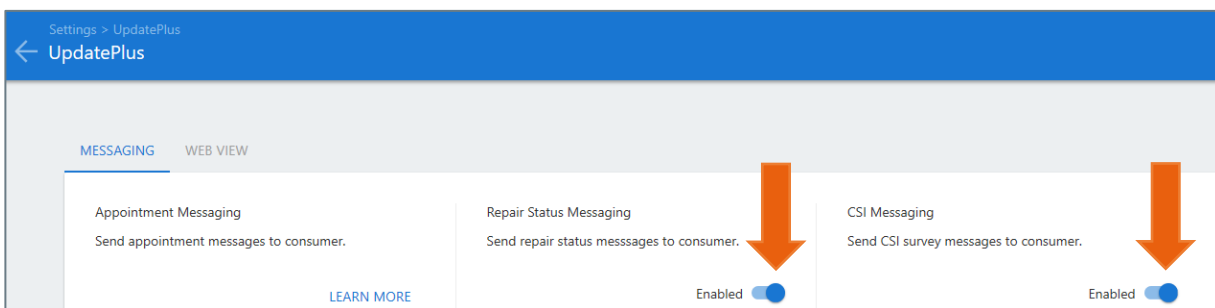
Note: This job aid provides general instructions. For carrier-specific settings, see the carrier-specific job aid provided during implementation.

Activate UpdatePlus

Within the application, go to Repair Facility Profile Settings (Configure, Profiles), locate **UpdatePlus** under **Repair Management**, and click on the arrow to open a new browser window. www.cccone.com will open automatically to the UpdatePlus settings as shown below.

Note: Launching within the application allows for Single Sign On. If you go directly to www.cccone.com, you will be asked to login in again.

Click the **Enabled** button for both Repair Status Messaging and CSI Messaging to activate all the UpdatePlus functionality. Click **Save**.



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Job Aid: CCC® UpdatePlus Settings, Continued

Default Profiles Setup

Once UpdatePlus is enabled, a **Default Profile** is automatically created for use with newly created workfiles. The Default Profile settings apply to **all workfiles unless** superseded by an Insurance Company UpdatePlus profile.

The screenshot shows the 'UpdatePlus' settings page. A box highlights the 'DEFAULT SETTINGS' section, which states: 'The following settings will be used by default on newly created workfiles.' Below this, there are two main sections: 'SEND REPAIR STATUS WHEN PAYER IS' and 'CSI'. The 'SEND REPAIR STATUS WHEN PAYER IS' section has a table with columns: Insurance Company, Internal, Warranty, Self Pay, Fleet, Other, and Not Specified. The 'Default' row has checkboxes: Insurance Company (checked), Internal (unchecked), Warranty (unchecked), Self Pay (checked), Fleet (unchecked), Other (unchecked), and Not Specified (checked). The 'CSI' section has a table with columns: Send Survey (Assignment), Send Survey (Non-assignment), and Service Recovery. The 'Default' row has checkboxes: Send Survey (Assignment) (checked), Send Survey (Non-assignment) (unchecked), and Service Recovery (checked). An orange callout box says: 'Note: We recommend leaving the default options as is for both Repair Status and CSI.'

No Insurance Company Profile

Next, it is always a good idea to also create a **No Insurance Company profile** for workfiles that are not associated with a carrier.

Step	Action
1	Scroll down to the Insurance Settings section.
2	Click or tap +Add to create another entry to add the "no insurance" profile.

The screenshot shows the 'Add Insurance Companies' dialog box. It has a search bar at the top with the placeholder text 'Enter Insurance Company Name'. Below the search bar is a list of insurance companies. The first item is '[No insurance company]' with a blue checkmark to its left. An orange arrow points up to this item. Below the list are 'OK' and 'CANCEL' buttons. An orange arrow points down to the 'OK' button.

3	The [No insurance company] option is the first item on the list. Click to select it and then click OK .
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Job Aid: CCC® UpdatePlus Settings, Continued

No Insurance Company Profile, continued

Step	Action
4	We recommend that you select the same options as were automatically selected for the Default Profile – as shown below.
5	Click Save to save your changes.

The following settings will be used on workfiles created for the specified insurance companies.

	SHARE DATA	SEND REPAIR STATUS WHEN PAYER IS ⓘ							CSI		
		Insurance Company	Internal	Warranty	Self Pay	Fleet	Other	Not Specified	Send Survey (Assignment)	Send Survey (Non-assignment)	Service Recovery
[No insurance company]	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Note: Data Sharing is greyed out so that you cannot accidentally share information with a carrier.

Add Insurance Company Profile

Now its time to add your Insurance Company-specific UpdatePlus profiles and enable Data Sharing this time. Then select your settings. **Note:** This discussion is a general description. Please see carrier-specific job aids for settings for a specific Insurance Company.

Note: If you go directly to cccone.com, you must login in again.

Use the following steps to add an Insurance Company UpdatePlus profile:

Step	Action
1	Click or tap +Add to create another entry to add the insurance company.

The following settings will be used on workfiles created for the specified insurance companies.

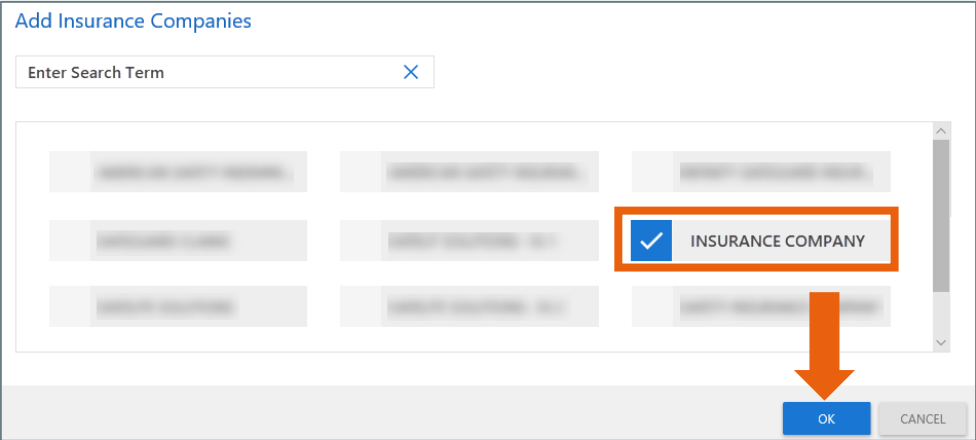
	SHARE DATA	SEND REPAIR STATUS WHEN PAYER IS ⓘ							CSI		
		Insurance Company	Internal	Warranty	Self Pay	Fleet	Other	Not Specified	Send Survey (Assignment)	Send Survey (Non-assignment)	Service Recovery
[No insurance company]	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[New insurance company]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

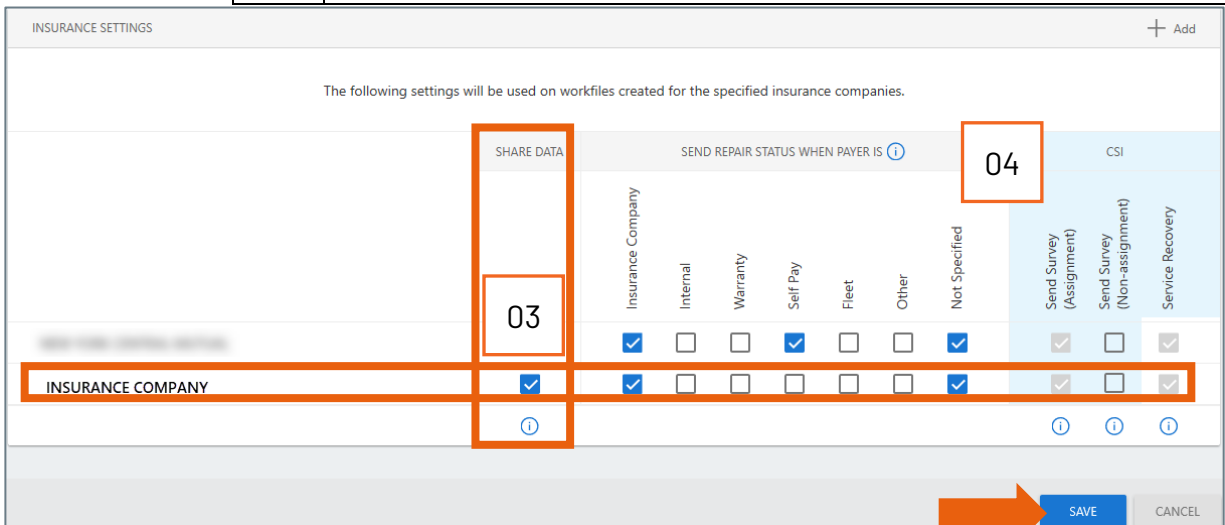
SAVE **CANCEL**

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Job Aid: CCC® UpdatePlus Settings, Continued

Add Insurance Company Profile, continued

Step	Action
2	The Add Insurance Companies popup displays. Scroll or Search for the insurance company you want to add when the selection list displays. Click to check the desired company name and then click OK .
	
3	Select the Share Data checkbox then click OK . NOTE: Data Share applies at the Repairer level (You must have access to MSO level settings). All locations will be enabled under the Repairer.



	SHARE DATA	SEND REPAIR STATUS WHEN PAYER IS							CSI		
Insurance Company		Internal	Warranty	Self Pay	Fleet	Other	Not Specified	Send Survey (Assignment)	Send Survey (Non-assignment)	Service Recovery	
INSURANCE COMPANY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

4	Select the options shown here for Sending Repair Status and CSI . You will be provided the appropriate options to select based on insurance company.
5	Once you have selected the appropriate options, click or tap Save .

What is Data Sharing?

Data Sharing allows Insurers to view the status messages sent by the shop, the responses from consumers, and the results from the multiple question CSI survey.

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Job Aid: CCC® UpdatePlus Settings, Continued

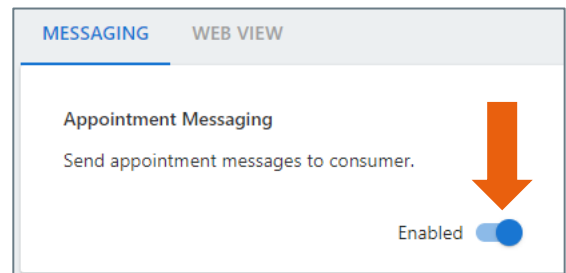
Add Insurance Company Profile, continued

The UpdatePlus settings you have enabled for this insurance company are now active and you will be returned to the main Settings Menu. Repeat as needed for each insurance company. Now let's see how it works for Appointments.

Configure Appointments

Appointments allows you to send customers Estimate and Drop-off Appointments and send updates if those Appointments change.

To configure Appointments, again return to www.cccone.com. Go to **Settings** and then select **UpdatePlus**. Click or tap the button to enable the feature.

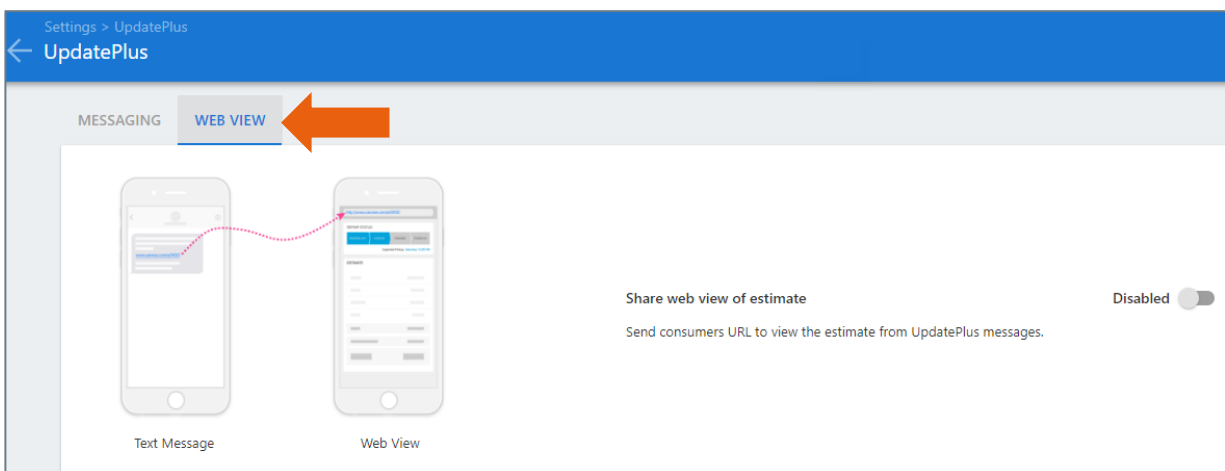


Enable UpdatePlus Web View

Web View allows you to share repair data with your customers in real time using Carwise.

To enable Consumer View access to the estimate, perform the following steps:


Step	Action
1	If needed, return to Settings and select UpdatePlus . Click or tap on the tab labeled Web View .

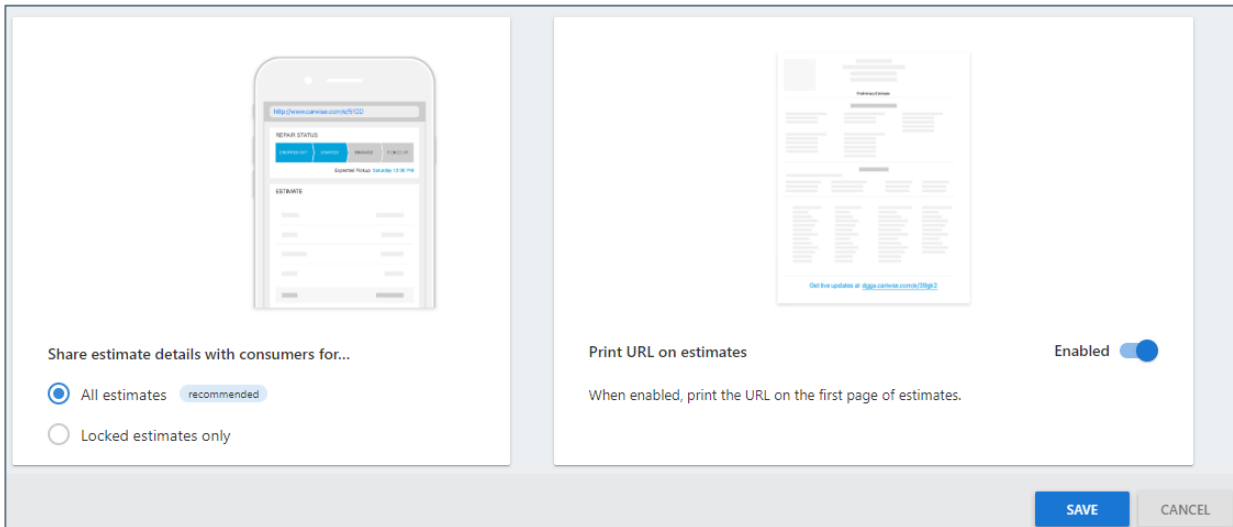


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Job Aid: CCC® UpdatePlus Settings, Continued

Enable UpdatePlus Web View, continued

Step	Action
2	Click or tap to enable the feature.  New options will display on the screen.



3	On the left side, select whether you want to “share estimate details with consumers” for all estimates or for locked estimates only . All is recommended.
4	On the right side, you can choose to print the URL on estimates that are shared with your consumers so that they can open the estimate in Web View. It defaults to enabled.
5	When finished making your selections, click or tap Save .

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Job Aid: Automatic Insurance Event Sync Setup

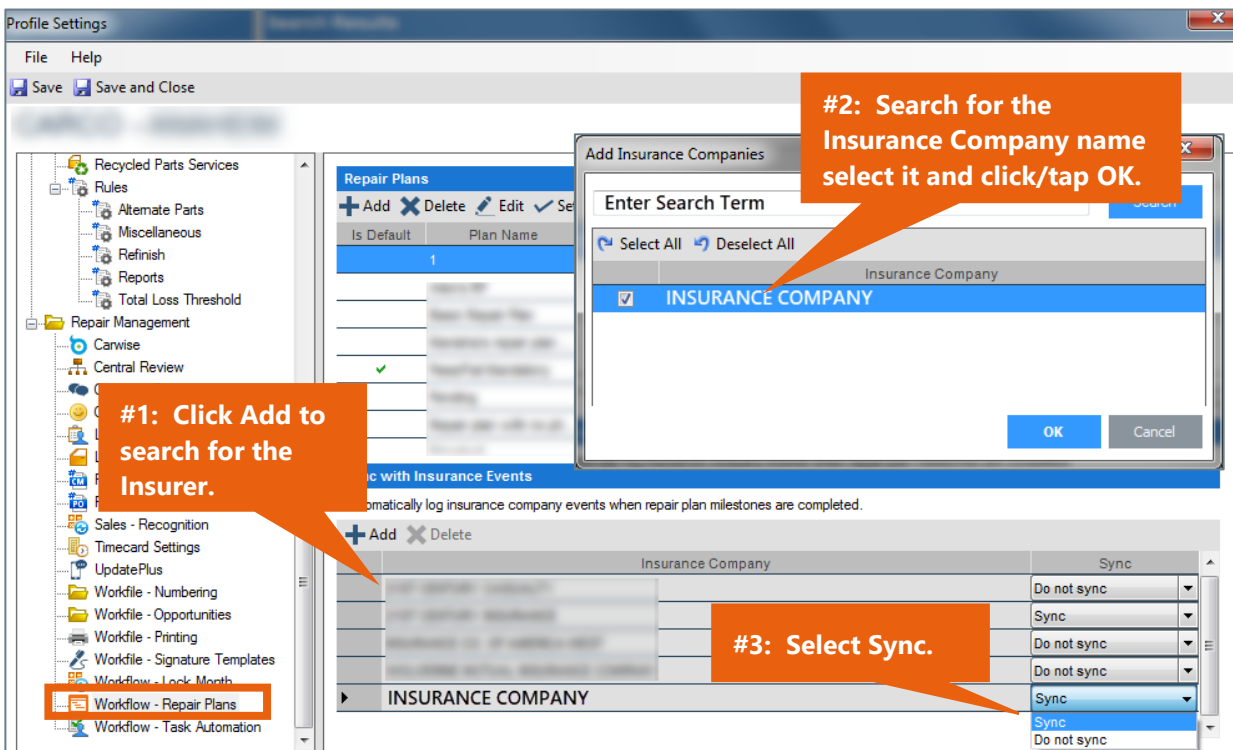
Introduction

CCC® Repair Workflow users can enable automatic Event syncing for your Repair Plans.

Why do this? By doing so, the system will automatically log Insurance Company events when Repair Plan milestones are completed. This way, you never forget to add Predefined, required events to your DRP claims.

Procedure

To begin, open your Repair Facility Profile and scroll to the **Workflow - Repair Plans** section. Next, complete the three steps shown below.



Once you have completed these three steps, the appropriate Predefined Events will be added automatically to the **DRP** claim.