

## CCC® Workflow Appraiser Management – Payment Requests

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### Overview

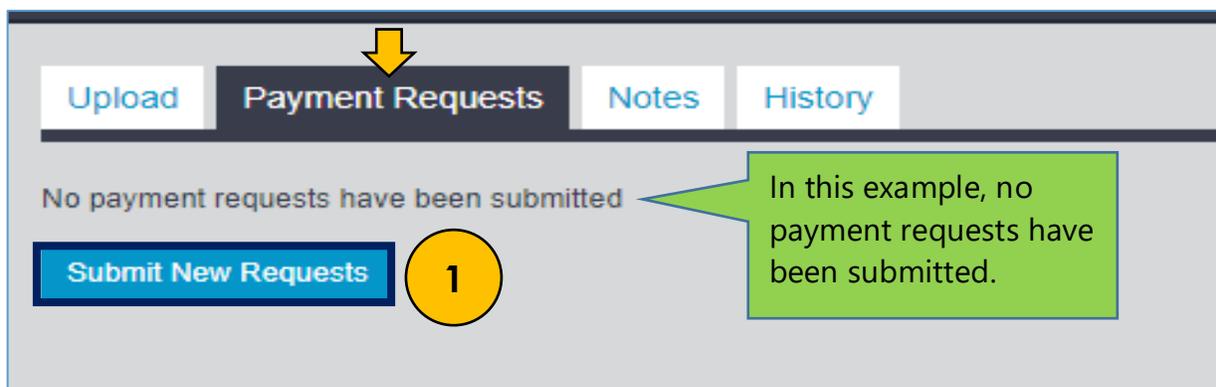
The Payment Requests tab displays existing payment requests and lets you create new payment requests.

This document explains how to use the Submit New Requests button for viewing and submitting payment requests.

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### New Payment Requests

Select the **Payment Requests** tab on the CCC Portal, and then click the **Submit New Requests** button (#1).



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# CCC® Workflow Appraiser Management – Payment Requests, Continued

## Enter and Submit Payment Information

The Submit Payment Requests pop up window opens. You enter the payment information here.

After you enter the information, click on the **Submit** button to submit the payment request, **or** click on the **Submit & Notify** button to notify additional recipients for the submitted payment request (**#2**).

Clicking on **Cancel** on the Submit Payment Requests window closes the window and the payment request is not submitted.

**Note:** If EMS data has already been uploaded for a claim, some fields will be pre-populated. If no EMS data exists, the fields will be blank, and you manually enter the field information. You can enter '0' and negative values for any fields which accept '\$'.

**Submit Payment Requests**

**Cycle Time Dates** \*Required

Date In\*  Date Out\*  Date Started\*  Date Completed\*

Repair Cycle Time(days)

**Billing Guidelines**

Labor	Labor hours	Parts	Paint Materials
<input type="text" value="48.50"/>	<input type="text" value="23.60"/>	<input type="text" value="613.65"/>	<input type="text" value="\$ 0.00"/>
Glass	Towing	Rental	Rental Days
<input type="text" value="\$ 0.00"/>	<input type="text" value="\$ 0.00"/>	<input type="text" value="\$ 0.00"/>	<input type="text" value="0"/>
Sublet	Storage	Tax	Betterment
<input type="text" value="\$ 0.00"/>			
Unrelated Prior Damage	Other		
<input type="text" value="\$ 0.00"/>	<input type="text" value="\$ 0.00"/>		
Total	Estimate Total	Company Pays	Customer Pays
<input type="text" value="662.15"/>	<input type="text" value="693.75"/>	<input type="text" value="662.15"/>	<input type="text" value="\$ 0.00"/>

**Tax Information**

Repair Facility	Rental Car Company	Tax ID #	Tax ID #
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Instructions**

Payment Request Instructions

**2**

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# CCC® Workflow Appraiser Management – Payment Requests, Continued

## The following fields are on the Submit Payment Requests window:

- Date In & Date Out
- Date Started & Date Completed
- Cycle Time (calculated from Date Started and Date Completed)
- Labor
- Labor Hours
- Parts
- Paint Materials
- Glass
- Towing
- Rental
- Rental Days
- Sublet
- Storage
- Other (you can enter a label for 'Other')
- Tax
- Betterment
- Unrelated Prior Damage
- Total (calculated field)
- Customer Pays
- Estimate Total (calculated field – Based on Estimate ##)
- Company Pays (calculated field)
- RF Name (required)
- Rental Car Facility
- Rental Tax ID
- Payment Request Instructions (never pre-filled)

The screenshot shows the 'Submit Payment Requests' window with the following sections:

- Cycle Time Dates:** Fields for Date In\*, Date Out\*, Date Started\*, and Date Completed\* (all marked as required). A Repair Cycle Time(days) field is set to 0.
- Billing Guidelines:** A grid of fields for Labor (48.50), Labor hours (23.60), Parts (613.65), Paint Materials (\$ 0.00), Glass (\$ 0.00), Towing (\$ 0.00), Rental (\$ 0.00), Rental Days (0), Sublet (\$ 0.00), Storage (\$ 0.00), Tax (\$ 0.00), and Betterment (\$ 0.00). Summary fields at the bottom show Total (662.15), Estimate Total (693.75), Company Pays (662.15), and Customer Pays (\$ 0.00).
- Tax Information:** Fields for Repair Facility, Rental Car Company, Tax ID #, and another Tax ID #.
- Instructions:** A text area for Payment Request Instructions.

### Note: Cycle Time Dates Are Required (\*) Mandatory Fields:

If any of the mandatory (required\*) fields are missing data and you click on the Submit or Submit & Notify button an error message will display on the screen:

The left screenshot shows the 'Submit Payment Requests' window with the 'Date In\*' field highlighted by a red box. The right screenshot shows the same window with an error message overlay: "There was an error with your submission: Date In is a required field. Please enter a value." The error message is displayed in a red box at the top of the window.

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## CCC® Workflow Appraiser Management – Payment Requests, Continued

### Once submitted, Payment Requests will be listed on the Payment Requests tab

The Payment Requests view displays the following columns:  
 Checkbox / Date / Request / Based On / Submitted By / Amount / Status

If there are previously submitted payment requests, the tab displays the list of submitted requests:

<input type="checkbox"/>	Date	Request	Based On	Submitted By	Amount	Status
<input type="checkbox"/>	08/04/2020	Payment Request - 05	Supplement 01		\$ 662.15	●
<input type="checkbox"/>	08/03/2020	Payment Request - 04	Estimate 01		\$ 595.20	●
<input type="checkbox"/>	08/03/2020	Payment Request - 03			\$ 509.33	●
<input type="checkbox"/>	08/03/2020	Payment Request - 02			\$ 112.00	●
<input type="checkbox"/>	08/03/2020	20 Payment Request - 01			\$ 20.00	●

Buttons: Submit New Requests, Print

**Note:** You can create a new payment request (or check the appropriate box  to update a payment request) by clicking the **Submit New Requests** button. This opens the Submit Payment Requests widow.

### A business event will be created and available on the claim History tab for the submitted payment request:

Event Date	User ID	Description
2020/04/04 08:20:15 PM GMT	av@	Payment Request added to the Claim Folder Created

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# CCC® Workflow Appraiser Management – Payment Requests, Continued

**Note:** You can click on the **Payment Request** number to view the previously submitted payment request as a PDF file.

<input type="checkbox"/>	Date	Request	Based On	Submitted By	Amount	Status
<input type="checkbox"/>	08/04/2020	<a href="#">Payment Request - 05</a>	Supplement 01		\$ 662.15	●
<input type="checkbox"/>	08/03/2020	<a href="#">Payment Request - 04</a>	Estimate 01		\$ 595.20	●
<input type="checkbox"/>	08/03/2020	<a href="#">Payment Request - 03</a>			\$ 509.33	●
<input type="checkbox"/>	08/03/2020	<a href="#">Payment Request - 02</a>			\$ 112.00	●
<input type="checkbox"/>	08/03/2020	<a href="#">Payment Request - 01</a>			\$ 20.00	●

Submit New Requests    Print



### Payment Request

File ID: Payment Request - 05 Status: SUBMITTED

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#### Claim Information

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Insurance Company:	INSURANCE COMPANY	Claim Office:	CLAIM OFFICE
Claim Reference ID:	new-01	Date of Loss:	01/01/2020
Policy Number:		Deductible:	\$100.00

<b>Agent Details</b>		Phone:	
Name:			
<b>Insured Details</b>		Phone:	
Insured Name:	TEST, TEST		
<b>Claimant Details</b>		Phone:	
Claimant Name:			
<b>Vehicle Details</b>		Mileage:	
Vehicle:	2002 Acura RSX AUTOMATIC W/LEATHER	License Plate:	
VIN:		Driveable:	Unknown
Area of Damage :	Right Rear		
Rental Coverage:			

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#### Payment Request Information

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Based on Supplement 01

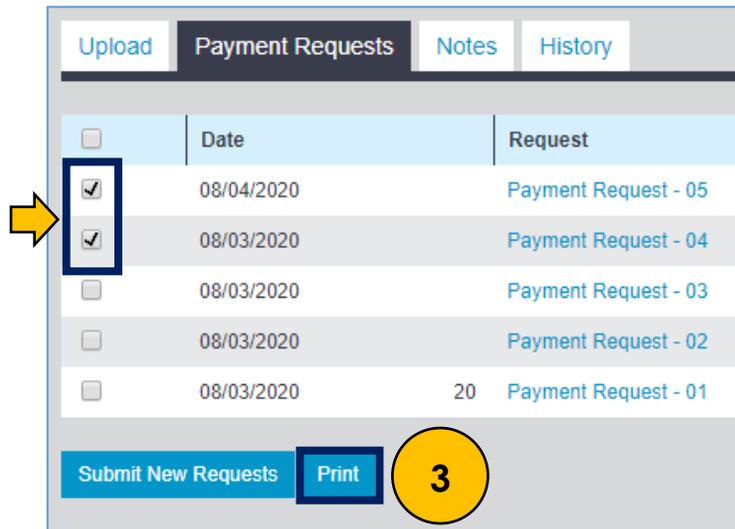
<b>Cycle Time Dates</b>			
Date In:	01/01/2020	Date Started:	01/01/2020
Date Out:	01/04/2020	Date Completed:	01/04/2020
Repair Cycle Time:	3		

Billing Guidelines

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# CCC® Workflow Appraiser Management – Payment Requests, Continued

You can select one or multiple Payment Requests to print by selecting their check boxes and clicking on the **Print** button (#3).



The application opens all the selected Payment Requests in a single PDF file:

**Payment Request**

File ID: Payment Request - 02 Status: SUBMITTED

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**Claim Information**

Insurance Company:	INSURANCE COMPANY	Claim Office:	CLAIM OFFICE
Claim Reference ID:		Date of Loss:	01/01/2020
Policy Number:	POLICCY	Deductible:	\$100.00

**Agent Details**

Name:	AGEN CLAIM REP	Phone:	
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**Insured Details**

Insured Name:	NAME, LAST	Phone:	
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**Claimant Details**

Claimant Name:	UNKNOWN, CLAIMANT	Phone:	
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**Vehicle Details**

Vehicle:	2004 BUICK PARK AVENUE	Mileage:	12,355
VIN:		License Plate:	
Area of Damage :	Front,Left Front Pillar	Driveable:	Unknown
Rental Coverage:			

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**Payment Request Information**

Based on Estimate 01

**Cycle Time Dates**

Date In:	01/01/2020	Date Started:	01/01/2020
Date Out:	01/04/2020	Date Completed:	01/04/2020
Repair Cycle Time:	5		

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## CCC® Workflow Appraiser Management – Payment Requests, continued

### Submitted Payment Request Documents Display for Insurance Companies

Payment requests submitted by appraisers are available for the insurance company to review, accept, or decline on the insurance company's claim folder Summary tab:

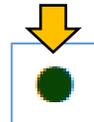
04/04/2020	<a href="#">Payment Request - 08</a>	E01	-\$9805.59	<span style="color: green;">●</span> Accepted	<a href="#">review</a> <a href="#">create check request</a>
04/04/2020	<a href="#">Payment Request - 07</a>	E01	-\$1225.67	<span style="color: red;">●</span> Declined	<a href="#">review</a> <a href="#">create check request</a>

Based on the insurance company action (Accept or Decline), the payment request status is updated on the appraiser's Payment Requests tab:



<a href="#">Upload</a>	<b>Payment Requests</b>	<a href="#">Notes</a>	<a href="#">History</a>			
<input type="checkbox"/>	Date	Request	Based On	Submitted By	Amount	Status
<input type="checkbox"/>	04/04/2020	<a href="#">Payment Request - 08</a>	Estimate 01	HEIDI BRONKHORST, CLU, AIA, CMAA	\$ -9805.59	<span style="color: green;">●</span>
<input type="checkbox"/>	04/04/2020	<a href="#">Payment Request - 07</a>	Estimate 01	HEIDI BRONKHORST, CLU, AIA, CMAA	\$ -1225.67	<span style="color: red;">●</span>

Payment Request Accepted



Payment Request Declined

