

Job Aid: Selecting Header Print Options in CCC ONE® Appraiser Platform

Introduction In CCC Pathways, there was a feature called "Affiliate". Now, in CCC ONE® Appraiser Platform, your selections on the Contacts and Insurance Workfile tabs will drive what prints on the Estimate Headers. You can now choose the following options to print on the Estimate Header in CCC ONE:

- The IA Office **Only**
- The IA Office **AND** the Insurance Company information
- The Insurance Company **ONLY**
- The Independent Appraiser's Name

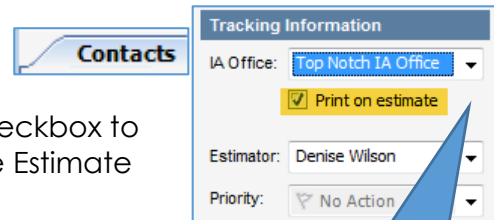
This job aid describes each Header and what options to select in order to print each of these Headers in CCC ONE.

Print the IA Office ONLY on Header

The default option when creating a new Estimate not associate with an Assignment and does not have an Insurance Company selected on the Insurance tab is to print the IA Office only.

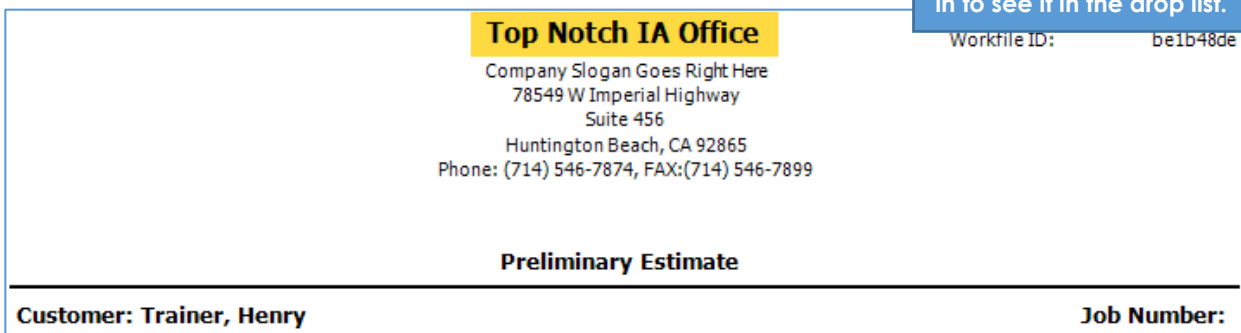
To do this, go to the **Workfile Contacts tab, Tracking Information.**

Clicking into the **Print on estimate** checkbox to select it, will print the IA Office on the Estimate Header.



Click on the **IA Office drop list** to change to a different IA Office. The Estimate Header will look like this:

Tip! If the IA Office has just been created, exit CCC ONE then log back in to see it in the drop list.



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Job Aid: Selecting Header Print Options in CCC ONE® Appraiser Platform, Continued

Print the IA Office AND Insurance Company on Header

The default option when working on an Insurance Company Assignment is to print both the IA Office AND the Insurance Company information on the Estimate Header.

To do this, leave the Print on estimate check box selected on the Contacts tab.

If you already have the Assignment, the appropriate Claim Office is already selected on the Insurance tab.

If you create a new Workfile, go to the **Insurance tab** and select the **Insurance Company** from the drop list. Next, select the **Claim Office**.

To add a custom line of text, e.g., instructions for a supplement or Insurance Company required text, enter it into the **Company:** field.

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Job Aid: Selecting Header Print Options in CCC ONE® Appraiser Platform, Continued

Print the Insurance Company ONLY on Header

Select this option when you **only want to print the Insurance Company** on the Estimate Header. This option will NOT print ANY IA information.

To do this, go to the **Workfile Contacts tab, Tracking Information**. Uncheck the **Print on estimate** checkbox.

Here is the Header that will print on the Estimate:

CCC1-IC1 TEST COMPANY-01

CCC1-IC1-CLAIM OFFICE3
Ins Company Address
Address #2
CERRITOS, CA 90703
Phone: (714) 564-6466, FAX:(897) 979-7979

Preliminary Estimate

Contacts

Tracking Information

IA Office: Top Notch IA Office ▾

Print on estimate

Estimator: Denise Wilson ▾

Priority: No Action ▾

Important!
Once locked, the Estimate of Record will display the name selected here.

Print the Independent Appraiser's Name on Header

Once the Estimate is locked, the name entered into the **Estimator** field under **Tracking Information** will display on the Estimate of Record.

CCC1-IC1 TEST COMPANY-01

CCC1-IC1-CLAIM OFFICE3
Ins Company Address
Address #2
CERRITOS, CA 90703

Estimate of Record

Written By: Denise Wilson