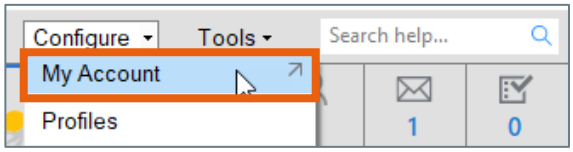
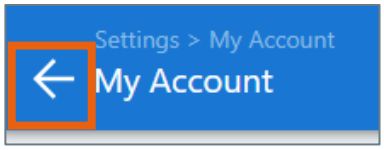
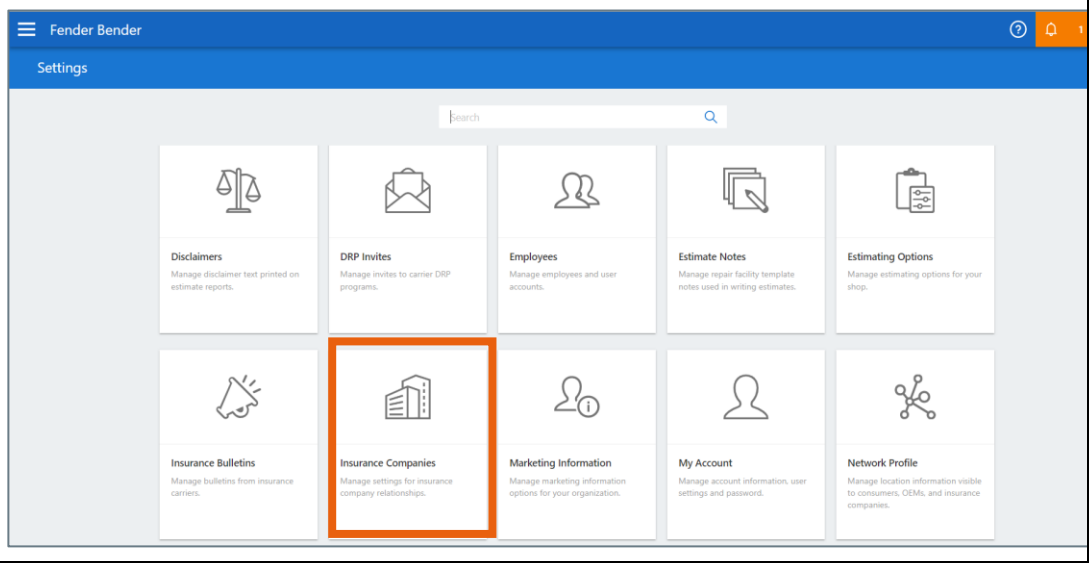
CCC® Scheduling: Insurance Appointment Configuration

Introduction

Insurance Scheduling allows certain insurance companies to add estimating appointments to your calendar. Follow this guide to configure CCC ONE® to properly receive Insurance Appointments.

Accessing Insurance Configuration – cccone.com

To access the Insurance appointment settings, start by logging in to CCC ONE®. Then, follow these steps to go to the **Insurance Settings** page.

Step	Action
1	Select **Configure**, then click on **My Account**. The **My Account** window will open in cccone.com. 
2	Click the **back arrow** to access the Settings. 
3	Select **Insurance Companies** icon from the **Settings** page. 

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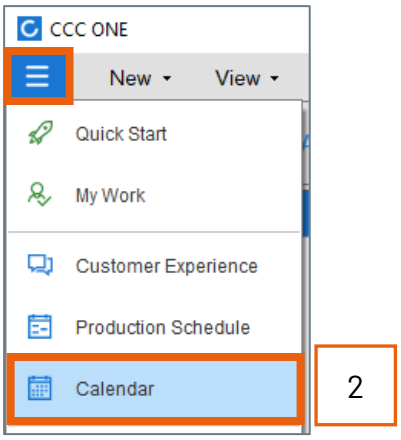
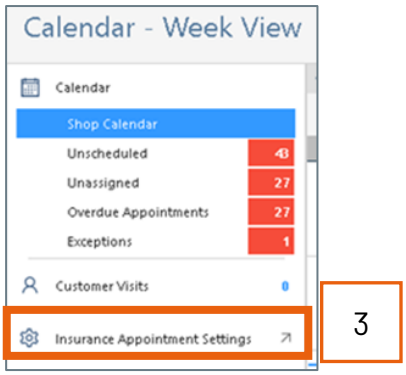
Accessing Insurance Configuration – CCC Estimating Desktop

To access the configure setting, start by logging in to CCC ONE®:

Step	Action
1	Select the **menu icon**. 
2	Select **Calendar** from the drop-down menu. The Calendar view opens.
3	Click the **Insurance Appointment Settings** link from the left-side panel of the Calendar view. The configurations page opens automatically, logging you into cccone.com. 

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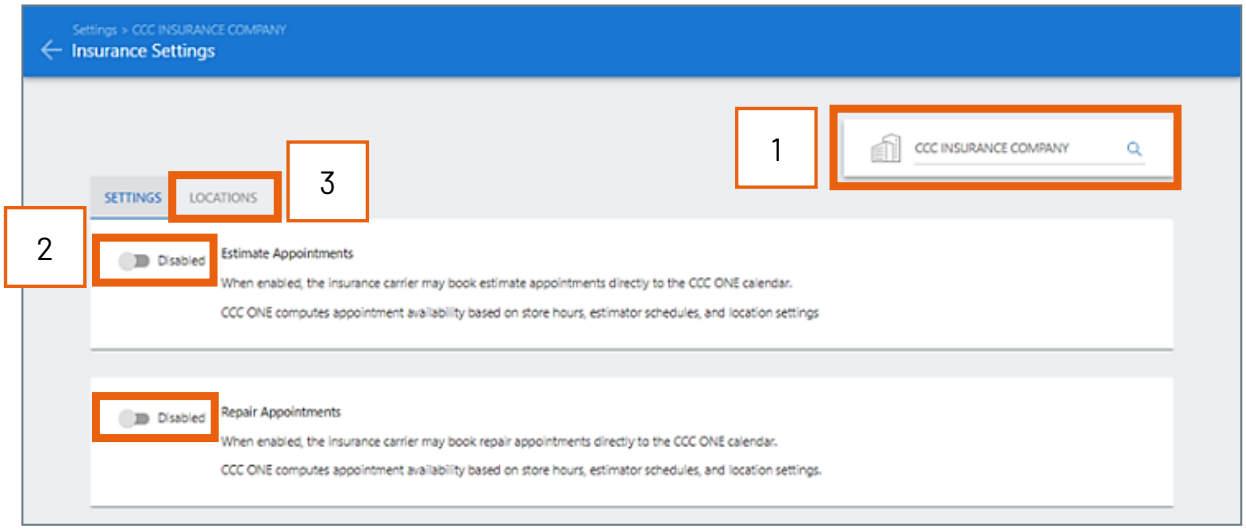
CCC® Scheduling: Insurance Appointment Configuration, Continued

Enable Appointments

Follow the steps below to Enable Estimate and Repair Appointments:

Step	Action
1	On the **Insurance Settings** configuration page in the **Settings** section, select an **Insurance Company** in the search field.
2	Move the slider to **Enable** the **Estimate Appointments** and **Repair Appointments**. A repair facility location must be configured to receive Appointments.
3	Select **Locations**.



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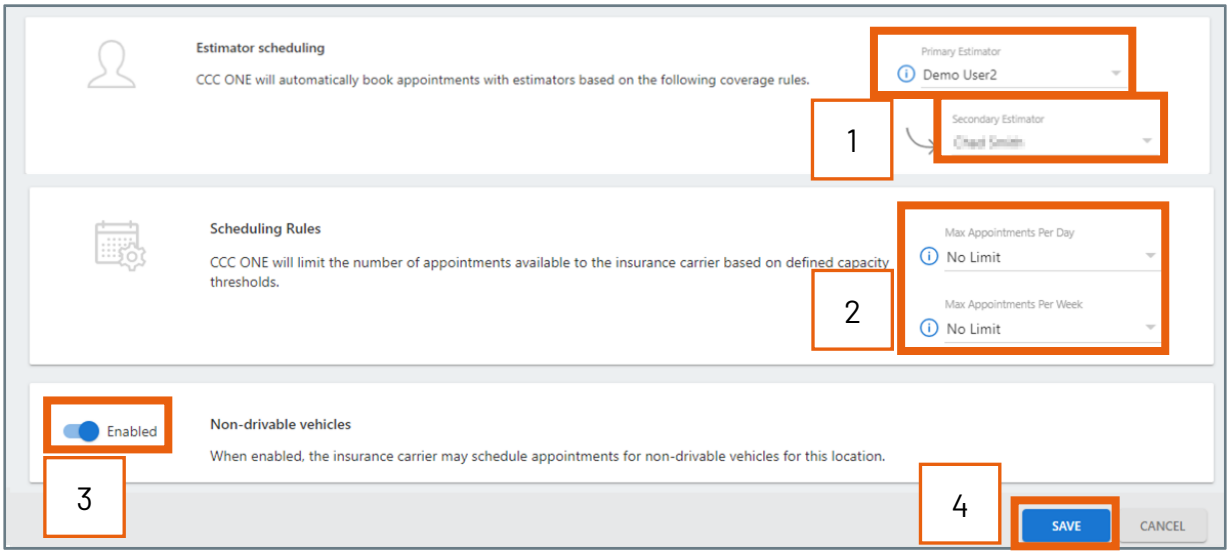
CCC® Scheduling: Insurance Appointment Configuration, Continued

Location Settings

Follow the steps below to configure Estimator Scheduling rules, Max Appointments Per Day/Week, and Non-drivable vehicle scheduling:

Step	Action
1	The **Estimator scheduling** function allows shops to route insurance assignments to specific estimators. If they have a preference, they can select a **Primary Estimator** from the drop-down, as well as a **Secondary Estimator**. **Note:** If the shop does not have a preference on which estimator is assigned the insurance job, they can keep this preference set to **Any Available Estimator**.
2	The **Scheduling Rules** allow shops to determine how flexible they want the availability to be on their calendar. Max Appointments per Day/Week from the insurance company can be set using the sliders. The default is set to **No Limit**.
3	The **Non-drivable vehicle** settings allow shops to **Enable** or **Disable** Non-drivable vehicle scheduling. When Enabled, the insurance carrier may schedule appointments for non-drivable vehicles for this location.
4	Click **Save**, when finished editing the location settings.



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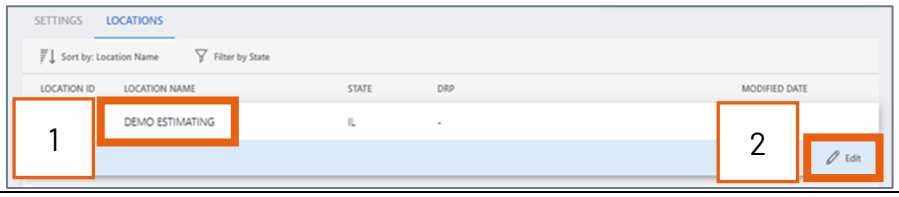
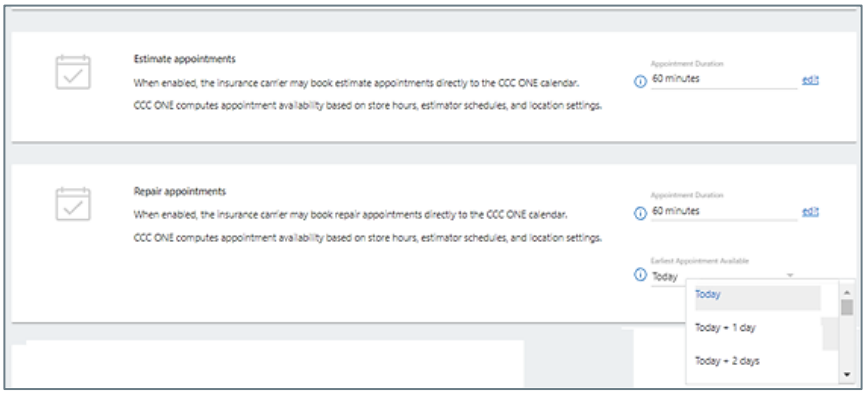
Insurance Appointment Configuration

Follow the steps below to return to the **Location Settings** page:

Step	Action
1	Select the **Location Name**.
2	Click **Edit** to return to the **Location Settings** for the selected location. 



Having **Estimate appointments** configured for the shop allows customers and/or insurance carriers the ability to send them estimate appointments directly within CCC ONE. The appointment duration can be set from 15 minutes up to 2 hours depending on the shop's needs.

Having **Repair appointments** configured for the shop allows customers and/or insurance carriers the ability to send you repair appointments directly within CCC ONE. The appointment duration can be set from 15 minutes up to 2 hours depending on the shop's needs. In addition to the repair appointment duration setting, CCC also allows the shop to indicate when they will be able to accept their next repair appointment.

The **Earliest appointment available** setting allows the shop to adjust how soon the insurance company can send them new repair appointments. If the shop has limited capacity, they may consider increasing their earliest appointment available setting. Choosing **Today + X** days means the earliest the insurance company could assign the shop a new repair appointment would be X days from today. For example, if today was Monday and your setting for repair appointments is **Today + 2 days**, the earliest your shop would be able to receive a repair appointment would be Wednesday.

Important: Changing this setting back to Today once the shop has availability for new appointments will help ensure that the shop does not miss out on new work from that insurance company.

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