

CCC® Scheduling – Insurance Appointments

Introduction

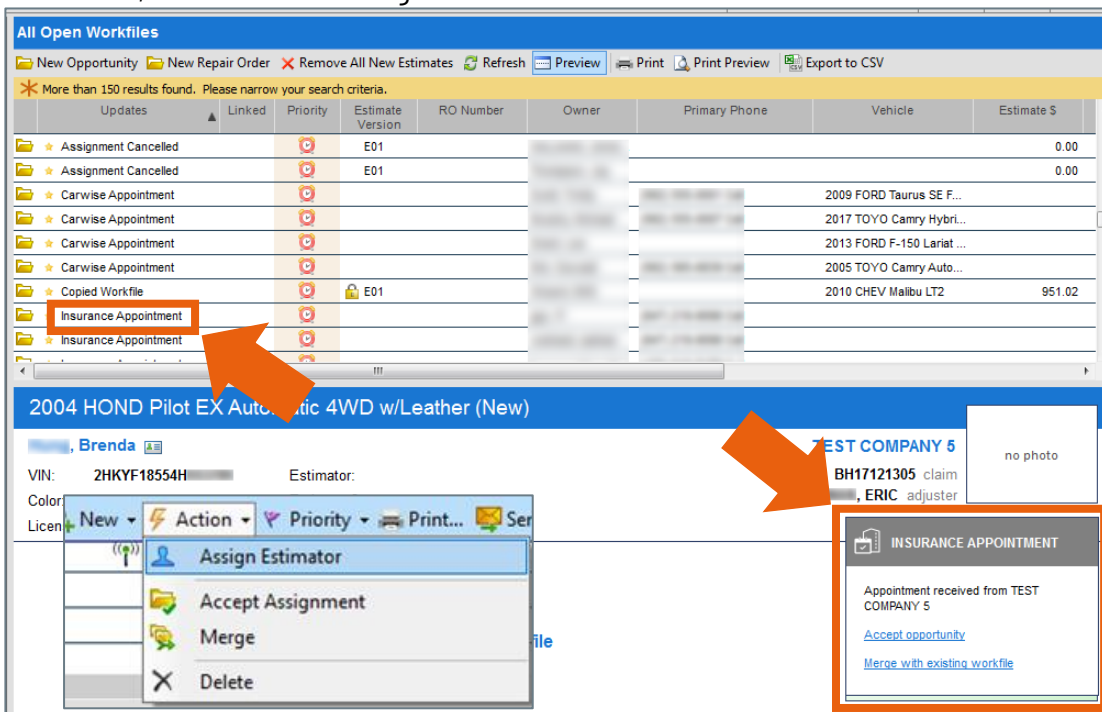
Shop Scheduling allows insurance companies that are enabled for scheduling, to add estimating appointments to your calendar, if your shop has been configured to accept them.

Appointment workfiles can be identified in the Workfiles View, with Inbox notifications, within the Workfile as well as on the Calendar. This job aid will show you how to identify appointments sent from the insurance company to your repair facility, known as Insurance Appointments, and what you can do with an appointment.

Workfile View

Insurance Appointments are created by the insurance company for your repair facility and will automatically populate in the shop’s worklist.

- These appointments will appear in the Workfiles view of CCC ONE as an Insurance Appointment (as shown below).
- Once the workfile is selected, the Workfile preview panel at the bottom of CCC ONE will identify the file as an Insurance Appointment as well.
- These appointments will have the same options under the actions menu as insurance assignments. For example, under the Action drop-down menu you will find options to **Assign** an Estimator, **Accept** the assignment, **Merge** the assignment with another workfile, or **Delete** the assignment.



Continued on next page

CCC® Scheduling – Insurance Appointments, Continued

Inbox

Insurance appointment notifications will also appear in your inbox. Here you can see your Received, Cancelled, and Updated Insurance Appointments.

Note: My Inbox messages can also be accessed through the Actions Center at **ccccone.com**.

Part	Function
1	Click the envelope icon to access your Inbox.
2	Click Insurance Companies to show only your notifications from Insurance Companies.
3	Click to View or Delete the selected notification. If View is selected the Message dialog box will appear displaying additional appointment information.

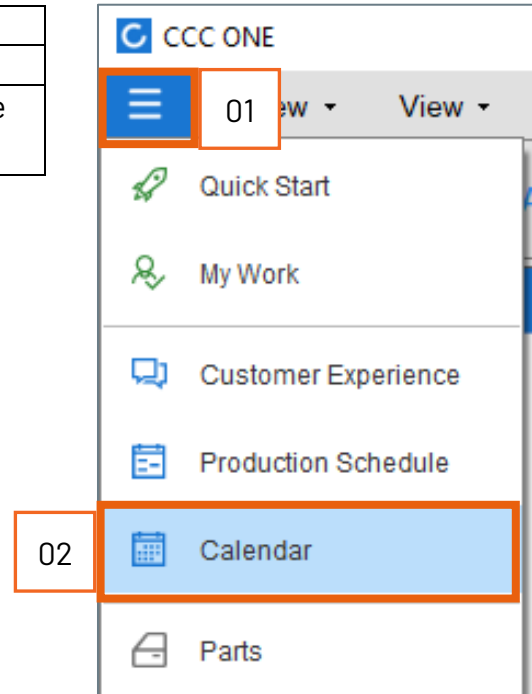
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CCC® Scheduling – Insurance Appointments, Continued

Accessing Calendar

Insurance Appointments automatically display in your repair facility's calendar when they are assigned by the insurance company as Estimate Appointments. Use the following to access your calendar:

Step	Action
1	Select the Menu icon.
2	Then select Calendar . The Calendar view opens.



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CCC® Scheduling – Insurance Appointments, Continued

Accessing Calendar

The calendar shows your location's Estimate Appointments. Click an appointment to view additional information about that appointment. An Insurance Appointment will display "Booked by" with the insurance company name underneath the appointment time.

The Appointment view details include:

- Who booked the appointment. Booked by = Insurance Company.
- The assigned estimator.
- Vehicle and claim information.
- Actions to Edit, Complete, or Cancel the appointment.

The screenshot displays the CCC ONE software interface. The main window is titled "Calendar - Week View" and shows a calendar for August 2020. A pop-up window titled "Estimate Appointment" is open, showing details for an appointment on Wednesday, August 05, from 12:00PM to 1:00PM. The appointment is booked by "TEST COMPANY 5". The details include the customer name "John Doe", the vehicle "2015 JEEP Grand Cherokee High Altitude RWD 4dr", and the claim information "TEST COMPANY 5 TIN_openshop_001 claim". The pop-up window has buttons for "Edit Appt", "Complete", and "Cancel Appt".

The customer will receive a notification if you or the insurance company update the appointment, as long as the communication preference was setup on the workfile. The Insurance Company will not receive a notification if you change the appointment with the customer.

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CCC® Scheduling – Insurance Appointments, Continued

Appointment Notifications

Note: Insurance Appointments function much like shop-created appointments.

The following Appointment notifications are sent or could be sent to the customer for Insurance Appointments:

Notification	Description
Estimate Appointment Confirmation	The customer will receive a notification of the Insurance Appointment details when the appointment is created via the delivery method they selected (email, text, or both).
Estimate Appointment Reminder	The customer will receive a reminder prior to the estimate appointment start time via the delivery method they selected (email, text, or both). Note: A notification will not be sent for appointments scheduled for the same day which is the same as for shop-created appointments.
Reschedule Estimate Appointment	If the Insurance Company or your Shop reschedules, the customer will receive a notification once the appointment has been rescheduled via the delivery method they selected (email, text, or both).
Cancel Estimate Appointment	If the Insurance Company or your shop cancels the Insurance Appointment, the customer will receive a cancellation notification via the delivery method selected (email, text, or both). Note: Cancellation notifications are for Insurance appointments ONLY.