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.						ur
	Inbox n job aid insuran	otifica will sho ce con	tions, within ow you how to npany to you	n be identified the Workfile a o identify apport r repair facility ou can do with	as well as on tl ointments ser y, known as In	he Calendar. ⁻ nt from the surance	
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••		• •		IKIIIes view u	I GGG UNE as	an insurance	
Appointment	(as show	n belov	w).				
 Once the worl 	kfile is se	lected	, the Workfile	e preview pan	el at the botto	m of CCC ON	E 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 exan	nple, u	nder the Acti	on drop-dowr	n menu you wi	Il find options	sto
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workfile, or D	elete the	assigi	iment.	1	L		
All Open Workfiles							
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* More than 150 results found. Pl Updates	ease narrow your sear Linked Priority	<mark>ch criteria.</mark> Estimate Version	RO Number Owne	r Primary Phone	Vehicle	Estimate \$	
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CCC° Scheduling – Insurance Appointments, Continued

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

Note: My Inbox messages can also be accessed through the Actions Center at **cccone.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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E New - View - Action	n - Recent -	Reports - Configure - Help -
ccc-		You're all clear! 99+ 99+
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My Sent Messages	CCC1-IC1 TEST Received Insurance Ap Owner:	Print @ Print Preview
	CCC1-IC1 TEST Received Insurance Ap Owner:	5/15/2020 10:12
My Work Orders 0	CCC1-IC1 TEST Received Insurance Ap Owner:	From: CCC1-IC1 TEST COMPANY-01
	EDRP TEST COM Insurance Message Received Claim #:	Owner: Handbooka, Huikitaa
	EDRP TEST COM Insurance Message Received Claim #:	Vehicle: 2013 CHEV MALIBU LTZ View Workfile Appt: 5/15/2020 10:45 AM
Time In: Session Start: 9:36 AM 9:36 AM	EDRP TEST CO Cancelled Insurance Ap Owner:	
6/09/2020	EDRP TEST CO Updated Insurance App Owner:	CCC1-IC1 TEST COMPANY-01 has booked an estimate appointment for Friday, 5/15 at 10:45 AM.
Clock-Out Timecard		Owner phone:
		ок

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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:

Action	
Select the Menu icon.	
Then select Calendar . The	
Calendar view opens.	
]
	Select the Menu icon. Then select Calendar . The



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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 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

Note: Insurance Appointments function much like shop-created Appointment Notifications 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.



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