Valuation and Post Valuation Grid Report

Overview This job aid reviews the key features and design of the Valuation and **Post Valuation Grid Report**. Insurance Carriers can use the grid report to view specific details regarding initial Valuation Requests and Post Valuation Modifications that are made on a claim. Use this dashboard to:

- Select Filters and time periods to view lien requests, refreshed • daily.
- View post valuation details.
- View specific attributes referencing each individual post valuation.

Note: This report differs from the Valuation Detail Report as it allows carries to view specific attributes at the post valuation level.

Access	Follow the steps below to access the Claim Breakdown report via the
Valuation	CCC [®] Portal.
Detail Report	

Step		Action			
1	Enter your User ID and Password to login to the CCC [®] Portal.				
2	Click the Tableau Reporting & Analytics link in the Analytics section of the CCC [®] Portal home page. A new Analytics window opens.	Quick Search for Claim Folders Claim Reference ID:	CCC Portal Welcome, Analytics • Tableau Reporting & Analytics		
3	Click Explore on the left-side panel.	<			
4	Select All Workbooks from the drop-down.	* ‡ ‡	Explore All Workbooks •		
5	Select the Claim Breakdown Dashboard.	 ☆ Home ☆ Favorites ③ Recents ♦ Shared with Me ♀ Recommendations Collections ④ Explore 	New Select All		

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Valuation and Post Valuation Grid Report, Continued

Dashboard

Filters



- Displays the **Date Range** based on the selection from the Date filter. •
- The Data Last Refreshed indicates the last date and time the data was refreshed in • the dashboard.
- Select the **Book** icon to view the glossary. •
- Select the **Question Mark** icon to enable a help overlay for dashboard tips. ٠

Note: When available click **Apply** to set the changes to the selection made.

Hierarchy Filters:

Stage	Description					
1	Displays the Claim Office					
	Level Hierarchy filter					
	options.					



Date Filters:

Stage	Description
1	Date Range Selection: Select
	either a Custom Date Range
	or a Fixed Date Range .
2	Custom Date Range: Select a
	Rolling, Current, Prior, etc.
	date range option.
3	Start/End Date Picker: Enter
	or select a custom date from
	the fields.



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Valuation and Post Valuation Grid Report, Continued

Dashboard

Filters, continued

Data Filters:

Stage	Description
1	The Claim filters options allow you to change the type of claim data displayed
	in the dashboard.
2	The Individuals filters allows you to select which individuals to display in the
	dashboard who were involved with the claim.
3	The Valuation filter options allow you to select the types of valuation related
	details to displayed in the dashboard.
4	The Vehicle filter options allow you to change the types of vehicles displayed
	in the dashboard.

Data Filters							
			Claim				
Claim Category		Claim T	Claim Type			tail	
(All)	•	(All)		•	(All)		•
			Individuals				
Adjuster		Apprais	er		Valuation User		
(All)	*	(AII)		•	(All)		•
Valuation Requester		Valuatio	on Submitter		Post Val Last S	ubmitter	
(All)	-	(AJI)		•	(All)		4
			Valuation				
Condition Baseline	Odometer Range		Severity Range Group	Settlemer	nt Type	Salvage Retained	
(All) 🔻	(All)	•	(All) 🔻	(All)	*	(All)	•
Loss Category	Loss Type		Loss State	Loss CBS	SA	Refurbished	
(All) 🔻	(All)	•	(All) 🔻	(All)	-	(All)	•
Vehicle Age	Vehicle Age Group		Condition Adjusted?	Post Val ?		Config ?	
(All) 🔻	(All) 🔻		(All) 🔻	(All) 🔻		(All)	•
Mileage Adjusted?	Pre Post Tax Adjustment ?		Last Request Number ?	Salvage Vehicle ?		Last Valuation Version ?	
(All) 🔻	(All)	•	(All) 🔻	(All)	•	(All)	•
			Vehicle				
Source		Vehicle I	Make		Vehicle Model		
(All)	•	(AII)		•	(All)		•
Vehicle Year		Vehicle I	Manufacturer		Vehicle Type		
(All)	•	(AII)		•	(All)		-
Secondary Company Name							
Secondary Company							•



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Valuation and Post Valuation Grid Report, Continued

Select filters and time periods in the Claim Breakdown dashboard to view performance.

	Valuation and Post	t Valuation Grid Re	port	🖓 Hier	archy 🔻 Da	ate 🔻	Data 🔻 🔟 ?
Date Range : 5/1/2023 - 6/1/2023 Data Last Refreshed: 8/21/2023 7:28:					Data Last Refreshed: 8/21/2023 7:28:48 PM		
Show Crosstab Yes No	Measures (Multiple values)	Total Rows 9,390				4	Download Crosstab
1 Adjuster Name	2 Appraiser Name	Valuation User Name	Post Valuation Detail Data Claim Category Desc	Claim Type Desc	: Company Name	:	Secondary Company Name
Adjuster 6	Appraiser 109816	SA-EASTFIELD-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 6	Appraiser 109816	SA-EASTFIELD-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 6	Appraiser 109816	SA-EASTFIELD-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 18	Appraiser 99887	SA-WESTFIELD-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 18	Appraiser 109816	SA-EASTFIELD-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 18	Appraiser 109816	SA-EASTFIELD-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 52	Appraiser 4870	SENT-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 52	Appraiser 4870	SENT-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 52	Appraiser 4870	SENT-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 52	Appraiser 4870	SENT-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 52	Appraiser 4870	SENT-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 52	Appraiser 7081	SENT-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 52	Appraiser 7081	SENT-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 52	Appraiser 15453	SENT-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 52	Appraiser 15453	SENT-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 52	Appraiser 15453	SENT-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 52	Appraiser 15453	SENT-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 52	Appraiser 25151	SENT-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 52	Appraiser 26111	SENT-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
Adjuster 52	Appraiser 26111	SENT-UNIV	Vehicle	Vehicle	Demo Company		Secondary Company
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Stage	Description
1	Select Yes to from the Show Crosstab section to display the Valuation and Post Valuation Grid Report data.
2	Use the Measures dropdown to select specific measures to display in the Post Valuation Detail Data grid.
3	The Total Rows area displays the count of records in the Data Details section.
4	Click Download Crosstab to download the Detail Data in an Excel or CSV format.
5	The Detail Data section shows all the attributes/data points that reference the lien request.

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Valuation **Detail Report**