Valuation and Post Valuation Grid Report

Overview

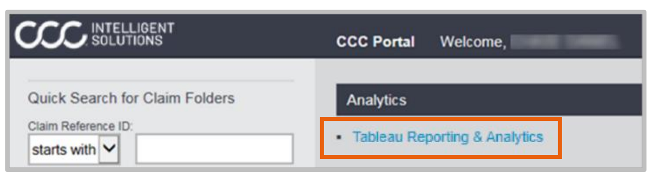
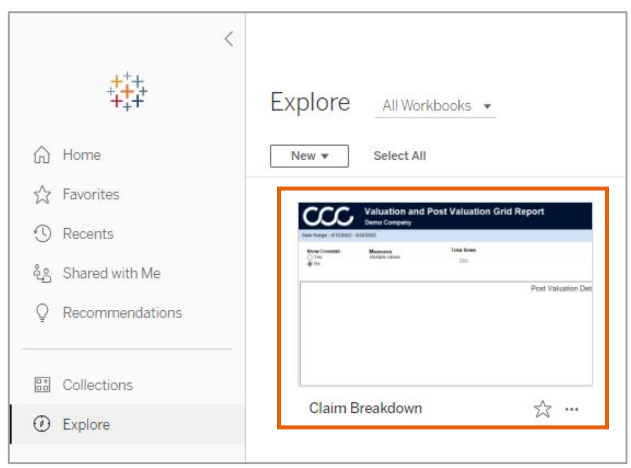
This job aid reviews the key features and design of the **Valuation and Post Valuation Grid Report**. Insurance Carriers can use the grid report to view specific details regarding initial Valuation Requests and Post Valuation Modifications that are made on a claim. Use this dashboard to:

- 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 Valuation Detail Report

Follow the steps below to access the Claim Breakdown report via the CCC® Portal.

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.	
3	Click **Explore** on the left-side panel.	
4	Select **All Workbooks** from the drop-down.	
5	Select the **Claim Breakdown** Dashboard.	

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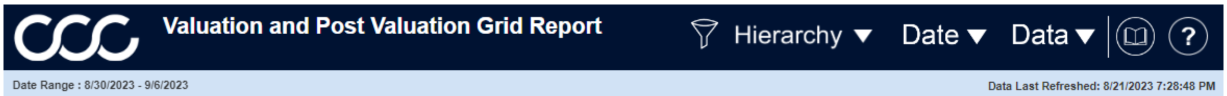
Dashboard Filters

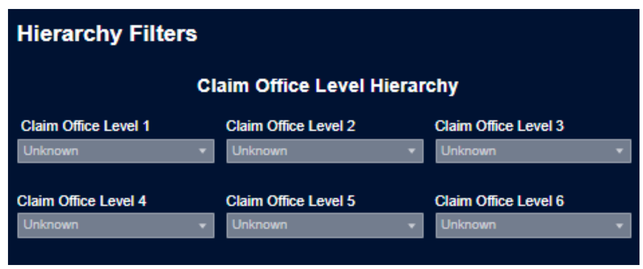


- Displays the **Date Range** based on the selection from the Date filter.
- The **Data Last Refreshed** indicates the last date and time the data was refreshed in the dashboard.
- Select the **Book** icon to view the glossary.
- Select the **Question Mark** icon to enable a help overlay for dashboard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

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

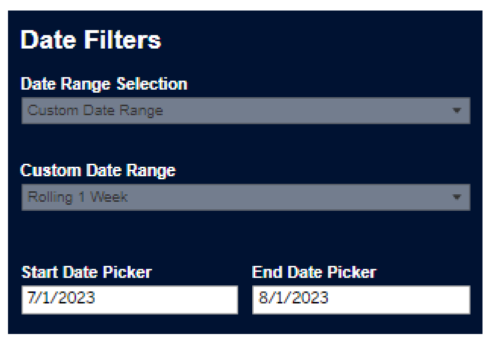
Hierarchy Filters:

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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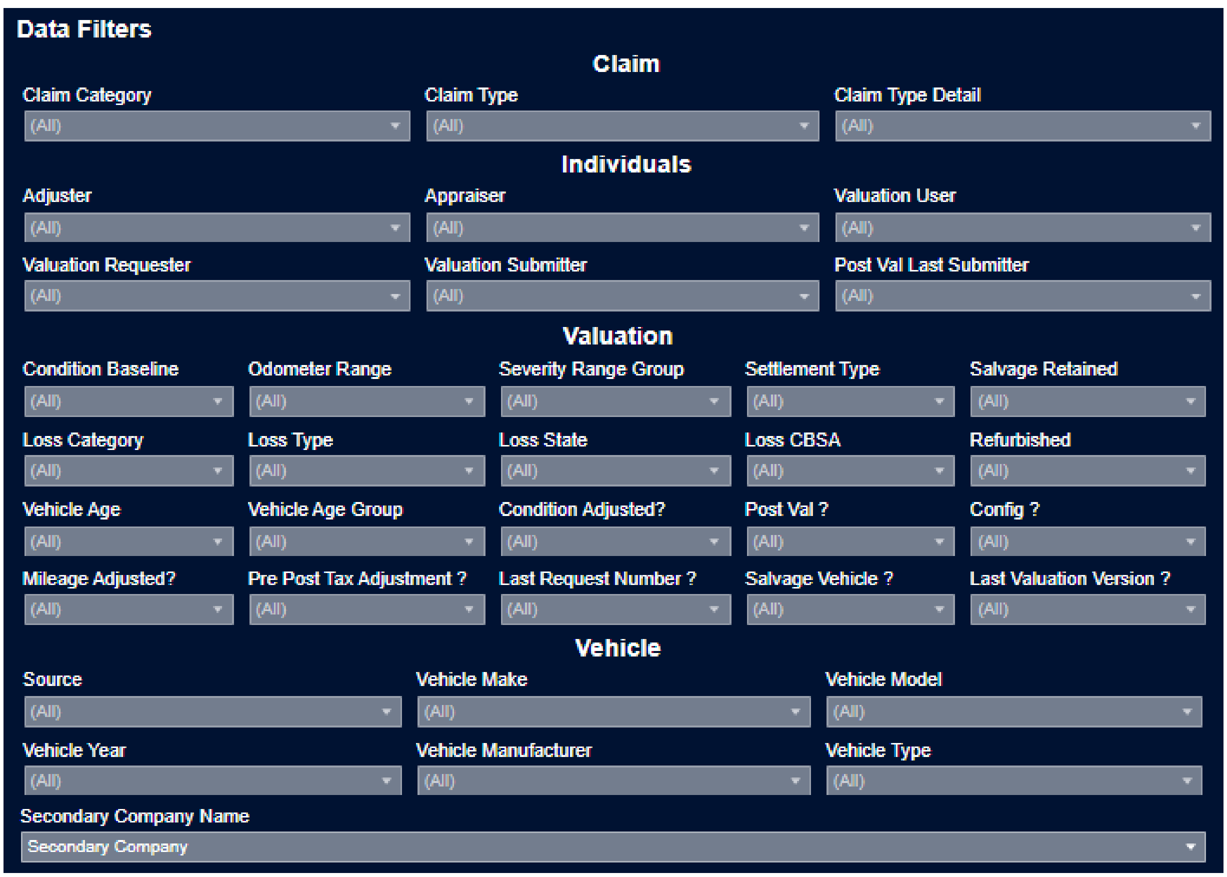
Dashboard Filters, continued

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.



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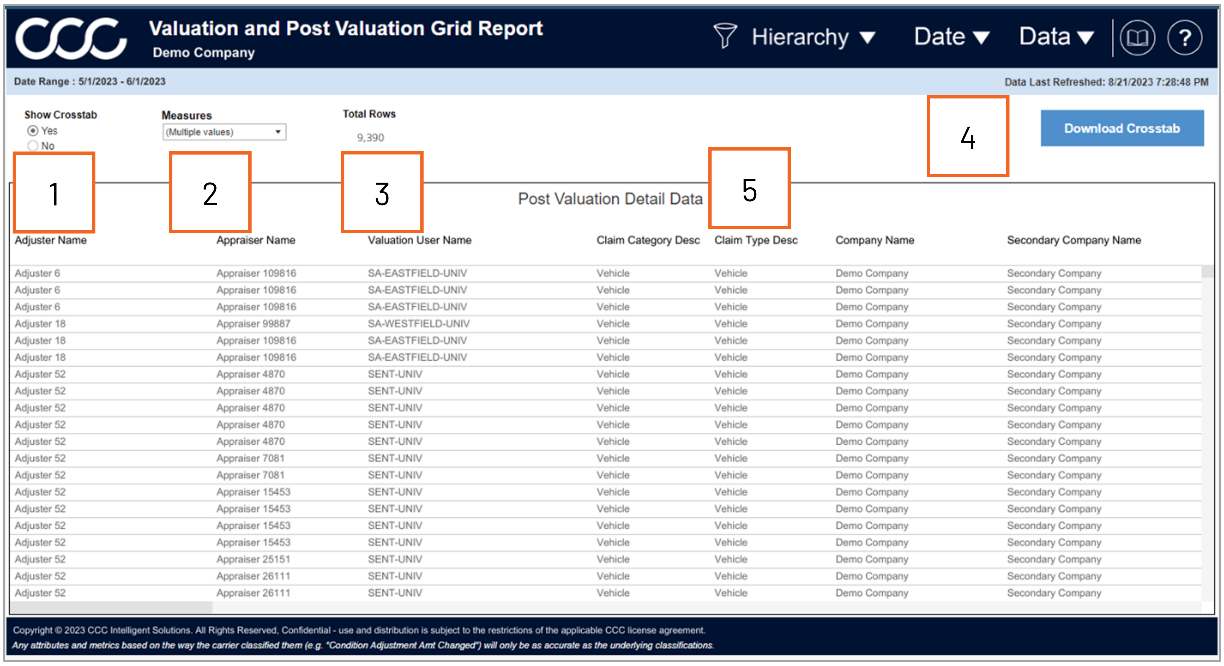
Valuation Detail Report

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



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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