Valuation Detail Report

This job aid reviews the key features and design of the Valuation Detail **Overview Report**. Select from the section tabs of Valuation Summary or Claim Breakdown, and filter data to view lien requests and valuation details, refreshed daily.

Access	Follow the steps below to access the Valuation Detail 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: starts with	CCC Portal Welcome, Analytics • Tableau Reporting & Analytics				
3	Click Explore on the left-side panel.	<					
4	Select All Workbooks from the drop-down.	Home	Explore All Workbooks •				
5	Select the Valuation Summary Dashboard.	☆ Favorites ① Recents ề₂ Shared with Me ♀ Recommendations Image: Collections Image: Explore	CCCC Valuation Dotal Report : Dona Calingang Tarmer : Stress :				



Dashboard Filters

Valuation Summary Claim Breakdown						
Solution Detail Report : Demo	Company	Hierarchy 🔻 Date 🔻	Data 🔻	🖻	?	
Date Range : 1/1/2024 - 2/23/2024	Data Last Refreshed: 2/19/2024 4:51:19 PM			Hide Trends		

- 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.
- The **Hide/Show Trends** toggle hides/shows the left-side trends panel.
- 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	Hierarchy Filters			
1	Displays the Submitter Level	Submitter Level Hierarchy Submitter Level 1 Name	Submitter Level 2 Name	Submitter Level 3 Name	Submitter Level 4 Name
	Hierarchy filter options.	Unknown Submitter Level 5 Name	Unknown v Submitter Level 6 Name	Unknown •	Unknown
2	Displays the Last Post Val	Unknown	Unknown	Unknown •]
	Submitter Hierarchy filter	Last Post Val Submitter Hi Last Post Val Submitter Level 1 Nar	erarchy ne Last Post Val Submitter Level 2 Nam	e Last Post Val Submitter Level 3 Nam	e Last Post Val Submitter Level 4 Name
	options.	Unknown	Unknown	Unknown	Unknown
		Last Post Val Submitter Level 5 Nar	ne Last Post Val Submitter Level 6 Nam	Last Post Val Submitter Level 7 Name	0
		Linknown	• Unknown •	Unknown	1

Date Filters:

Stage	Description	Date Filters
1	Date Range Selection: Select either a Custom	
	Date Range or a Fixed Date Range.	Date Range Selection Custom Date Range
2	Custom Date Range: Select a Rolling,	Custom Date Range
	Current, Prior, etc. date range option, when	Custom Date Range
	the Date Range Selection dropdown option	Rolling 1 Month •
	Custom Date Range is selected.	Start Date End Date
3	Start/End Date Picker: Enter or select a	1/1/2023 1/17/2023
	Fixed date from the fields, when the Date	
	Range Selection dropdown option Fixed Date	
	Range is selected.	



Dashboard

Filters, continued

Data Filters:

Stage	Description
1	The Claim filter options allow you to change the type of claim data displayed
	in the dashboard.
2	The Individual 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 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 Type	Claim Category	Claim Type Detail		
(All)	(All) -	(All) 👻		
Individuals				
Adjuster	Appraiser	Settlement Adjuster	Submitter	Valuation User
(All) •	(All) •	Settl Adjuster 1 🔹	(All) •	(All) •
Valuation				
Valuation Type	Condition Baseline	Settlement Type	Odometer Range	Severity Range Group
(All)	(All) 🔻	(All) 🔻	(All) 🔹	(All) 🔻
Loss Category	Loss Unit Type	Loss Type	Loss CBSA	Refurbished
(All) •	(All) •	(All) •	(All) •	(All) •
Vehicle Owner State	Vehicle Age	Vehicle Age Group	Leased Vehicle	Lien
(All) 🔹	(All) 🔹	(All) 🔻	(All) 🔹	(All) 🔹
Total Loss	Third Party	Post Val	Salvage	Branded Title
(All)	(All) 🔻	(All) 🔻	(All) •	(All)
Valuation Status	Build Sheet Flag	Fee Status		
Completed •	(All) •	(All) 🔻		
Vehicle				
Vehicle Source	Vehicle Make	Vehicle Model		
(All)	(All) 🔻	(All) 🔻		
Vehicle Year	Vehicle Manufacturer	Vehicle Type		
(All) •	(All) •	(All) •		
Company	Company	Secondary Company Name 🛛 🝸 👻		
Company •	Company •	Secondary Company 🔹		



Valuation Summary The Valuation Summary tab gives insight to appraisers and reviewers regarding the accuracy of performing valuations. This allows the carrier to aggregate/summarize up to four different attributes and identify trends.

Date Range : 3/1/2023 - 3/5/2024	Data Last Refreshed: 2/19/2	024 4:51:19 PM				Hide Trend
Trends: Measures: Months v (Multiple values) 2	Breakout Attribute		Avg Condition Rating	Avg Post Valuation Amt -\$163	Avg Post Valuation amt per Val -\$86	Valuation Coun
Avg Condition Adj Amt per Val	Attribute:	A A A A	ppraiser 2 1.0 ppraiser 6 1.0 ppraiser 13 1.0 ppraiser 18 1.0 ppraiser 79 1.0	-\$841 \$106	\$118 \$0 \$0 -\$221 \$13	1 1 2 61 8
Avg Condition Rating	1.1 Measures:	4 Apple × Apple Apple Apple Apple Apple	ppraiser 87 1.0 5 oraiser 146 1.1 1.0 oraiser 158 1.0 0 oraiser 232 1.1 1.0 oraiser 262 1.1 1.1	-\$294 -\$817 \$402 -\$360 -\$342 -\$379	-\$56 -\$272 \$139 -\$135 -\$91 -\$103	58 12 26 48 30 48
		Ap	oraiser 310 1.0	\$463	\$136	116
Avg Post Valuation Amt \$205	Attribute 1:	e(s): Appraiser, All, A		Avg Post Valuation	Avg Post Valuation	Valuation Co
Valuation Amt	Attribute 1: Appraiser	Attribute 1	Avg Condition Rating	Amt	amt per Val	Valuation Co
Valuation Amt \$205	Attribute 1: Appraiser Attribute 2:	Attribute 1 Appraiser 2	Avg Condition Rating		amt per Val \$118	Valuation Co
Valuation Amt	Attribute 1: Appraiser Attribute 2:	 Attribute 1 Appraiser 2 Appraiser 6 	Avg Condition Rating 1.0 1.0	Amt	amt per Val \$118 \$0	Valuation Co
Valuation Amt \$205	Attribute 1: Attribute 2: Attribute 2: Attribute 2: Attribute 2:	 Attribute 1 Appraiser 2 Appraiser 6 Appraiser 13 	Avg Condition Rating 1.0 1.0 1.0	Amt \$118	amt per Val \$118 \$0 \$0	
Valuation Amt	Attribute 1: Attribute 2: Attribute 3:	Attribute 1 Appraiser 2 Appraiser 6 Appraiser 13 Appraiser 18	Avg Condition Rating 1.0 1.0 1.0 1.0	Amt \$118 -\$841	amt per Val \$118 \$0 \$0 -\$221	Valuation Co
Valuation Amt	Altribute 1: Attribute 2: Altribute 2: Altribute 3: Altribute 3:	Attribute 1 Appraiser 2 Appraiser 6 Appraiser 13 Appraiser 18	Avg Condition Rating 1.0 1.0 1.0	Amt \$118	amt per Val \$118 \$0 \$0	
Valuation Amt 	Attribute 1: Attribute 2: Attribute 2: Attribute 3: Attribute 4: Attribute 3:	 Attribute 1 Appraiser 2 Appraiser 6 Appraiser 13 Appraiser 18 Appraiser 79 	Avg Condition Rating 1.0 1.0 1.0 1.0	Amt \$118 -\$841 \$106	amt per Val \$118 \$0 \$0 -\$221 \$13	
Valuation Amt 	4 Attribute 1: Appraiser 4 Attribute 2: [Attribute 2: [Attribute 3: [Attribute 3: [Attribute 4:]	Attribute 1 Appraiser 2 Appraiser 6 Appraiser 13 Appraiser 79 Appraiser 77	Avg Condition Rating 1.0 1.0 1.0 1.0 1.0 1.0 1.0	Amt \$118 -\$841 \$106 -\$294	amt per Val \$118 \$0 \$0 -\$221 \$13 -\$56	
Valuation Amt Avg Post Valuation amt -5106 4,906 Valuation	4 Attribute 1: Appraiser 4 Attribute 2: [Attribute 2: [Attribute 3: [Attribute 3: [Attribute 4:]	 Attribute 1 Appraiser 2 Appraiser 6 Appraiser 13 Appraiser 18 Appraiser 79 Appraiser 87 Appraiser 16 	Avg Condition Rating 1.0 1.0 1.0 1.0 1.0 1.0 1.1	Amt \$118 -\$841 \$106 -\$294 -\$817	amt per Val \$118 \$0 \$221 \$13 \$13 \$56 \$252	

Stage	Description
1	Trends can be filtered by Totals or one of the available time increments.
	Note: Hide Trends as needed by selecting the Toggle in the upper-right
	corner.
2	Select Multiple values under the Measures drop-down and click Apply to view
	results.
3	Breakout Attributes include filters such as Adjuster, Appraiser, Claim Types,
	Vehicle Information, and Time Frames.
4	The Search drop-down allows for including or excluding Attributes.
5	The options selected from the Measures drop-down are displayed in graph
	format.



Claim

Breakdown

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

	aluation Detail Report	: Demo Company	/			Hierarchy	▼ Date ▼ Data ▼	=
Date Range : 12/1/2023	8 - 3/5/2024	Data I	ast Refreshed: 2/19/202	24 4:51:19 PM				
Show Crosstab Yes No	2 Total Rows Meas	ures Ne values)	- 4				5 Download C	Cro
Adjuster Name	Adjuster Id	Appraiser Name	Appraiser Id	Submitter Name	Settlement Adjuster Name	Valuation User Name	Claim Category Desc	
Adjuster 25	39619	Appraiser 40736	0358947	Submitter 38882	Settl Adjuster 1	Val User 60653	Vehicle	
Adjuster 78	70645	Appraiser 14169	0035881	Submitter 13230	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 14169	0035881	Submitter 13230	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 17282	0034145	Submitter 15931	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 19389	0030845	Submitter 17782	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 25641	0014345	Submitter 24897	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 27342	UNK	Submitter 189511	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 44018	0012745	Submitter	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 44018	0012745	Submitter Submitter	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 51739	0022574	Submitter J	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 55913	0023445	Submitter	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 58786	UNK	Submitter 189511	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 72217	0022445	Submitter 68960	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 76164	101791	Submitter 74473	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 116713	0022845	Submitter 115581	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 116713	0022845	Submitter 115581	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 122524	0046645	Submitter 120636	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 128940	0025345	Submitter 126647	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 133495	0056745	Submitter 130993	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 133495	0056745	Submitter 130993	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 149814	0022974	Submitter 147667	Settl Adjuster 1	Val User 109324	Vehicle	
Adjuster 78	70645	Appraiser 158946	0046545	Submitter 189511	Settl Adjuster 1	Val User 109324	Vehicle	

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Stage	Description
1	Select Yes from the Show Crosstab section to display the Valuation Detail Report data.
2	The Total Rows area displays the count of records in the Data Details section.
3	Use the Measures dropdown to select specific measures to display in the Detail Data grid.
4	The Detail Data section shows all the attributes/data points that reference the lien request.
5	Click Download Crosstab to download the Detail Data in an Excel or CSV format.

