

Valuation Equipment Report

Overview

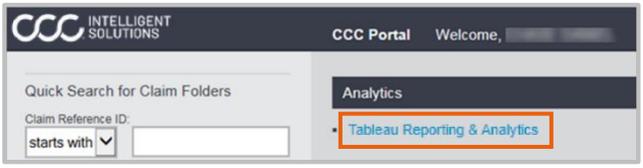
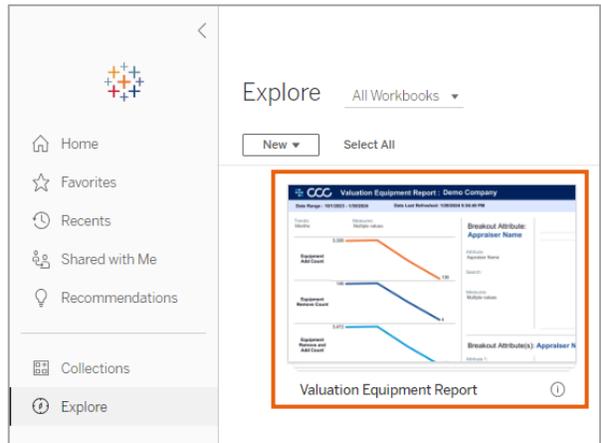
This job aid discusses the functionality of the **Valuation Equipment Report**. This dashboard provides a summary and claim breakdown view that allows carriers to get a better understanding on what's driving post valuation configuration for each claim.

This dashboard allows users to perform the following actions:

- Identify behaviors of the **Appraisers** and **Reviewers** regarding the accuracy of performing valuations.
- Analyze trends over time by specific **Metrics** or **Breakout Attributes**.
- Identify claims requiring action.
- Identify how much equipment was Added/Remove on each valuation version.
- View how many valuations were completed broken out by vehicle model, age, year, etc.

Access Valuation Equipment 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 Valuation Equipment Report Dashboard. 

Continued on next page

Valuation Equipment 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.
- 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
1	Displays the Appraiser Hierarchy filter options.
2	Displays the Adjuster Hierarchy filter options.
3	Displays the Submitter Level Hierarchy filter options.
4	Displays the Company Claim Office Hierarchy filter options.

Hierarchy Filters

Appraiser Hierarchy

Appraiser Level 1: (All) | Appraiser Level 2: (All) | Appraiser Level 3: (All) | Appraiser Level 4: UNK
 Appraiser Level 5: UNK | Appraiser Level 6: UNK | Appraiser Level 7: UNK

Adjuster Hierarchy

Adjuster Level 1: (All) | Adjuster Level 2: (All) | Adjuster Level 3: (All) | Adjuster Level 4: UNK
 Adjuster Level 5: UNK | Adjuster Level 6: UNK | Adjuster Level 7: UNK

Submitter Hierarchy

Submitter Level 1: (All) | Submitter Level 2: (All) | Submitter Level 3: (All) | Submitter Level 4: UNK
 Submitter Level 5: UNK | Submitter Level 6: UNK | Submitter Level 7: UNK

Company Claim Office Hierarchy

Claim Office Level 1: (All) | Claim Office Level 2: (All) | Claim Office Level 3: (All) | Claim Office Level 4: UNK
 Claim Office Level 5: UNK | Claim Office Level 6: UNK

Date Filters:

Stage	Description
1	Anchor Date: Select a claim lifecycle date when you want the dashboard graphs to begin displaying data.
2	Date Range Selection: Select either a Custom Date Range or a Fixed Date Range .
3	Custom Date Range: Select a Rolling, Current, Prior , etc. date range option, when the Date Range Selection dropdown option Custom Date Range is selected.
4	Start/End Date Picker: Enter or select a Fixed date from the fields, when the Date Range Selection dropdown option Fixed Date Range is selected.

Date Filters

Anchor Date: Valuation Date

Date Range Selection: Custom Date Range

Custom Date Range: Rolling 1 Year

Start Date: 1/1/2023 | End Date: 1/17/2023

Continued on next page

Valuation Equipment Report, Continued

**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 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: (All) ▼ Claim Type: (All) ▼ Claim Type Detail: (All) ▼

Individual

Appraiser Name: (All) ▼ Adjuster Name: (All) ▼ Submitter Name: (All) ▼ Valuation Username: (All) ▼

Valuation

Submitter Type: (All) ▼ Loss Category: (All) ▼ Loss Type: (All) ▼ Valuation State Code: (All) ▼

Loss ZIP Code: (All) ▼ Vehicle Age: (All) ▼ Refurbished: (All) ▼ Settlement Type: No ▼

Valuation Version: (All) ▼ Valuation Source: (All) ▼ Odometer Range: (All) ▼ Severity Group Range: (All) ▼

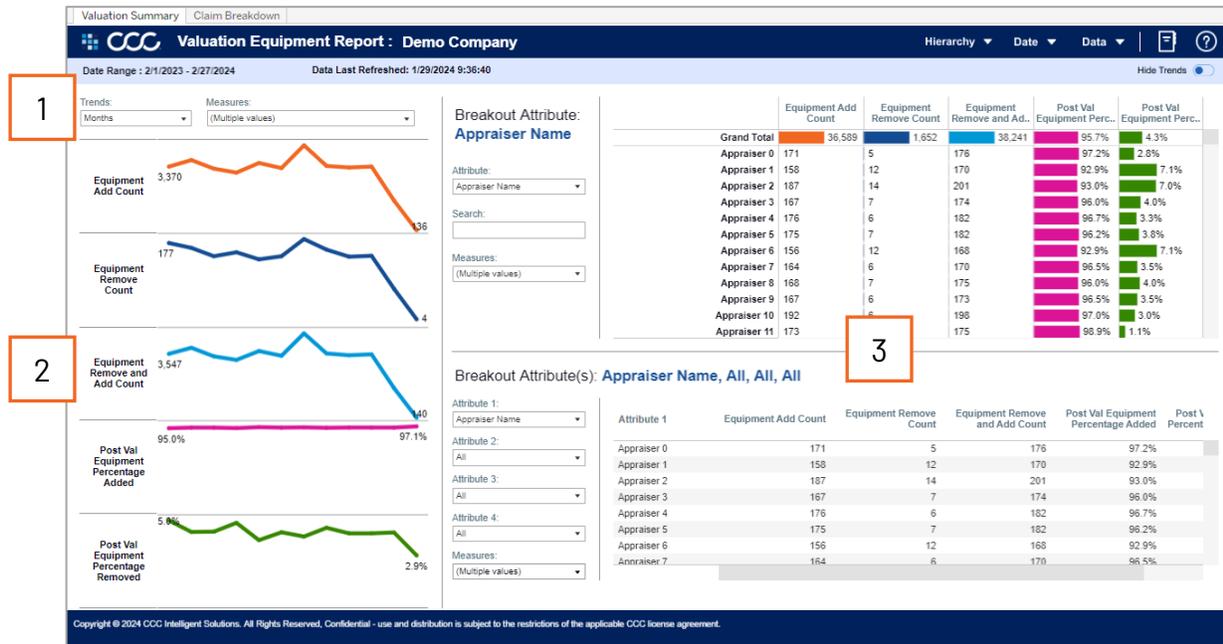
Vehicle

Vehicle Make: (All) ▼ Vehicle Model: (All) ▼ Vehicle Style: (All) ▼ Vehicle Type: (All) ▼

Valuation Equipment Report, Continued

Valuation Summary

The **Valuation Summary** tab displays a visual snapshot of the data that can be filtered.



Stage	Description
1	<p>Select the following drop-downs to populate the line chart:</p> <ul style="list-style-type: none"> Trends can be filtered by Totals or in time increments. Select Multiple values under the Measures drop-down and click Apply to view results.
2	<p>Shows the line charts based on the Measures and Trend selected.</p> <p>Hint: Hover over the line chart to view the Measure count at that time interval.</p> <p>Note: Hide Trends as needed by selecting the Toggle in the upper-right corner.</p> 
3	<p>The Breakout Attributes sections display the selected Attribute and Measures selected.</p> <ul style="list-style-type: none"> Breakout Attributes include filters such as Adjuster, Appraiser, Claim Types, Vehicle Information, and Time Frames. The options selected from the Measures drop-down are displayed in graph format. <p>Note: The Search drop-down allows for including or excluding Attributes.</p>

Continued on next page

Valuation Equipment Report, Continued

Valuation Summary, continued Select filters and time periods in the Claim Breakdown dashboard to view performance.

The screenshot shows the 'Valuation Detail Report : Demo Company' interface. The top navigation bar includes 'Valuation Summary', 'Claim Breakdown', and 'Valuation Detail Report : Demo Company'. The date range is 2/1/2023 - 2/27/2024, and the data was last refreshed on 2/19/2024 at 4:51:19 PM.

Section 1: Breakout Attribute: Appraiser

Appraiser	Avg Condition Rating	Avg Post Valuation Amt	Avg Post Valuation amt per Val	Valuation Count
Grand Total	1.1	-\$162	-\$85	62,642
Appraiser 2	1.0	\$118	\$118	1
Appraiser 6	1.0	\$0	\$0	1
Appraiser 13	1.0	\$0	\$0	2
Appraiser 18	1.0	-\$841	-\$221	61
Appraiser 79	1.0	\$106	\$13	8
Appraiser 87	1.0	-\$294	-\$56	58
Appraiser 146	1.1	-\$817	-\$272	12
Appraiser 158	1.0	\$402	\$139	26
Appraiser 184	1.0	-\$360	-\$135	48
Appraiser 232	1.1	-\$342	-\$91	30
Appraiser 262	1.1	-\$379	-\$103	48
Appraiser 310	1.0	\$463	\$136	116

Section 2: Breakout Attribute(s): Appraiser, Claim Type, Loss Category, Submitter

Appraiser	Claim Type	Loss Category	Submitter	Avg Condition Rating	Avg Post Valuation Amt	Avg Post Valuation amt per Val	Valuation Count
Appraiser 2	Vehicle	Comprehensive	Submitter 189511	1.0	\$118	\$118	1
Appraiser 6	Vehicle	Liability	Submitter 189511	1.0	\$0	\$0	1
Appraiser 13	Vehicle	Collision	Submitter 92906	1.0	\$0	\$0	1
Appraiser 18	Vehicle	Liability	Submitter 147616	1.0	\$0	\$0	1
Appraiser 18	Vehicle	Collision	Submitter 15	1.0	-\$2,133	-\$1,599	8
Appraiser 18	Vehicle	Liability	Submitter 189511	1.0	\$0	\$0	2
Appraiser 18	Vehicle	Liability	Submitter 15	1.2	-\$346	-\$346	4
Appraiser 18	Vehicle	Liability	Submitter 189511	1.0	\$0	\$0	2
Appraiser 18	Vehicle	Other	Submitter 15	1.0	\$121	\$16	45
Appraiser 79	Vehicle	Collision	Submitter 72	1.0	\$0	\$0	4

Stage	Description																																																
1	The top Breakout Attribute section shows an analyzes of a single Attribute in a bar graph by the Measure(s) selected.																																																
2	<p>The bottom Breakout Attribute(s) section shows an aggregate view of up to four (4) of the selected Attributes, based on the Measure(s) selected.</p> <p>Click the plus + icon to expand the Attributes columns shown in the dashboard. Press the minus - icon to collapse the Attributes columns.</p> <p>Appraiser, Claim Type, Loss Category, Submitter</p> <table border="1"> <thead> <tr> <th>Appraiser</th> <th>Claim Type</th> <th>Loss Category</th> <th>Submitter</th> <th>Avg Condition Rating</th> <th>Avg Post Valuation Amt</th> <th>Avg Post Valuation amt per Val</th> <th>Valuation Count</th> </tr> </thead> <tbody> <tr> <td>Appraiser 2</td> <td>Vehicle</td> <td>Comprehensive</td> <td>Submitter 189511</td> <td>1.0</td> <td>\$118</td> <td>\$118</td> <td>1</td> </tr> <tr> <td>Appraiser 6</td> <td>Vehicle</td> <td>Liability</td> <td>Submitter 189511</td> <td>1.0</td> <td>\$0</td> <td>\$0</td> <td>1</td> </tr> <tr> <td>Appraiser 13</td> <td>Vehicle</td> <td>Collision</td> <td>Submitter 92906</td> <td>1.0</td> <td>\$0</td> <td>\$0</td> <td>1</td> </tr> <tr> <td>Appraiser 18</td> <td>Vehicle</td> <td>Liability</td> <td>Submitter 147616</td> <td>1.0</td> <td>\$0</td> <td>\$0</td> <td>1</td> </tr> <tr> <td>Appraiser 18</td> <td>Vehicle</td> <td>Collision</td> <td>Submitter 15</td> <td>1.0</td> <td>-\$2,133</td> <td>-\$1,599</td> <td>8</td> </tr> </tbody> </table>	Appraiser	Claim Type	Loss Category	Submitter	Avg Condition Rating	Avg Post Valuation Amt	Avg Post Valuation amt per Val	Valuation Count	Appraiser 2	Vehicle	Comprehensive	Submitter 189511	1.0	\$118	\$118	1	Appraiser 6	Vehicle	Liability	Submitter 189511	1.0	\$0	\$0	1	Appraiser 13	Vehicle	Collision	Submitter 92906	1.0	\$0	\$0	1	Appraiser 18	Vehicle	Liability	Submitter 147616	1.0	\$0	\$0	1	Appraiser 18	Vehicle	Collision	Submitter 15	1.0	-\$2,133	-\$1,599	8
Appraiser	Claim Type	Loss Category	Submitter	Avg Condition Rating	Avg Post Valuation Amt	Avg Post Valuation amt per Val	Valuation Count																																										
Appraiser 2	Vehicle	Comprehensive	Submitter 189511	1.0	\$118	\$118	1																																										
Appraiser 6	Vehicle	Liability	Submitter 189511	1.0	\$0	\$0	1																																										
Appraiser 13	Vehicle	Collision	Submitter 92906	1.0	\$0	\$0	1																																										
Appraiser 18	Vehicle	Liability	Submitter 147616	1.0	\$0	\$0	1																																										
Appraiser 18	Vehicle	Collision	Submitter 15	1.0	-\$2,133	-\$1,599	8																																										
3	<p>Click the Breakout Attribute dashboard items to filter the dashboard by your selection. Press Control to select multiple items.</p> <p>Breakout Attribute(s): Appraiser, Claim Type, Loss Category, All</p> <table border="1"> <thead> <tr> <th>Appraiser</th> <th>Claim Type</th> <th>Loss Category</th> <th>Submitter</th> <th>Avg Condition Rating</th> </tr> </thead> <tbody> <tr> <td>Appraiser 2</td> <td>Vehicle</td> <td>Comprehensive</td> <td>All</td> <td>1.</td> </tr> <tr> <td>Appraiser 6</td> <td>Vehicle</td> <td>Liability</td> <td>All</td> <td>1.</td> </tr> <tr> <td>Appraiser 13</td> <td>Vehicle</td> <td>Collision</td> <td>All</td> <td>1.</td> </tr> </tbody> </table>	Appraiser	Claim Type	Loss Category	Submitter	Avg Condition Rating	Appraiser 2	Vehicle	Comprehensive	All	1.	Appraiser 6	Vehicle	Liability	All	1.	Appraiser 13	Vehicle	Collision	All	1.																												
Appraiser	Claim Type	Loss Category	Submitter	Avg Condition Rating																																													
Appraiser 2	Vehicle	Comprehensive	All	1.																																													
Appraiser 6	Vehicle	Liability	All	1.																																													
Appraiser 13	Vehicle	Collision	All	1.																																													

Continued on next page

Valuation Equipment Report, Continued

Claim Breakdown

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

The screenshot displays the 'Valuation Equipment Report' for 'Demo Company'. At the top, there's a navigation bar with 'Valuation Summary' and 'Claim Breakdown' tabs. Below this, the report title 'Valuation Equipment Report : Demo Company' is shown along with 'Hierarchy', 'Date', and 'Data' dropdowns. The date range is set to '1/1/2024 - 2/27/2024', and the data was last refreshed on '1/29/2024 9:36:40 PM'. In the 'Show Crosstab' section, the 'Yes' radio button is selected. The 'Total Rows' count is 16,243. The 'Measures' dropdown is set to '(Multiple values)'. A 'Download Crosstab' button is located to the right. The main table lists appraisal levels (Appraiser 2 through 68) and adjuster levels (Adjuster Level 1 #2 through 2 #8) for various claim numbers. A 'Data Detail' section at the bottom shows a list of attributes for a specific claim.

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

Continued on next page