



# CCC® Connect Documents, Bulletins, & Contracts Guide

## Overview

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### Introduction

CCC® Connect Contracts, Documents, and Bulletins features allow Insurance Company users to communicate directly with their In-Network shops about requirements, guidelines, and policies.

Use the Contracts feature to upload the contract documents that will be sent to the shops along with the Shop Invitation. Use the Document feature to upload guidelines, regulations, etc. to Connect. Once a contract or document has been uploaded and published, use the Bulletin feature to send messages to your In-Network shops with new information or policies, etc., attaching these documents as needed.

CCC shops will receive Insurance Bulletins, Contracts, and the published Documents directly into CCC® Estimating. Non-CCC (AVAM) shops will use their normal process of downloading information from mycccportal.com.

This Guide shows users how to:

- Upload Contracts
- Upload & Publish Documents
- Create & Send Bulletins
- Maintain Bulletins
- What the Shop Sees

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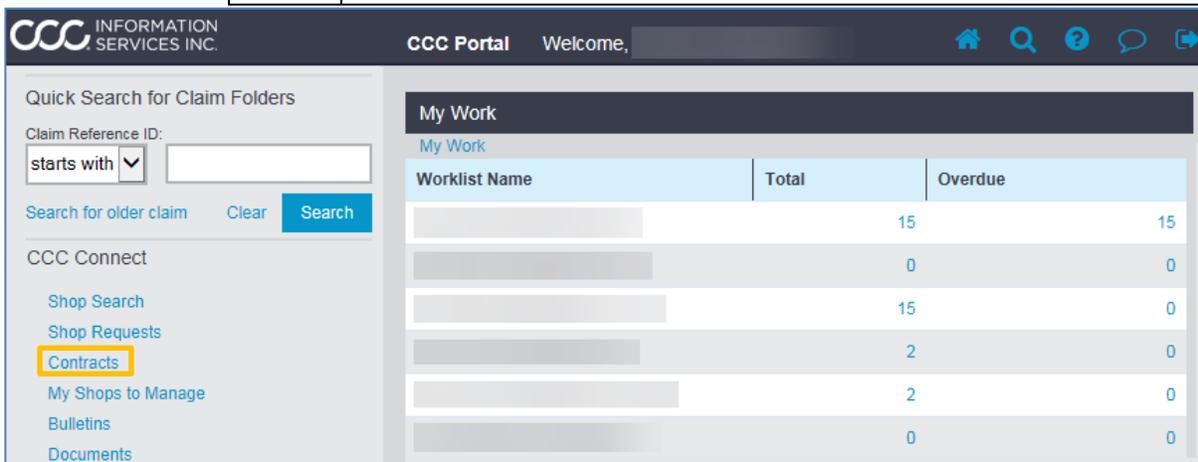
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# Upload & Maintain Contracts

**Introduction** CCC® Connect Contracts allows you to upload contract documents and then create lists of those contracts for use when creating Shop Invitations. This job aid describes how to access the Contract feature and upload contracts.

**Access Connect Contracts** Use the following steps to access the Contracts feature:

Step	Action
1	Once logged into CCC Portal, go to the left panel and locate <b>CCC Connect</b> .
2	Click on <b>Contracts</b> .



**Upload Contract** The Contracts page displays with any existing contracts. You can see the Upload Date, the name of the Contract, and who uploaded it.



Simply click **Upload Contract** to begin.

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## Upload & Maintain Contracts, Continued

### Upload Contract, continued

The Upload Contract popup displays for you to name the contract and attach the PDF.

**Tip:** Contract Name must be 100 characters or less. If you don't enter a name, the system will use the PDF file name.

When ready, click **Upload** to add the new contract. The system updates and the new contract displays.

Contracts < 1 - 4 of 4 >		
Uploaded Date ▼	Contract Name	Uploaded By
08/27/2020 02:27 PM	SampleContract	
03/13/2018 11:09 AM	Contract Agreement	
12/13/2016 04:12 PM		

**NOTE:** Once uploaded, the Contract cannot be deleted but you can publish a new contract version which will be tracked on the Documents tab.

# Upload Documents

## Introduction

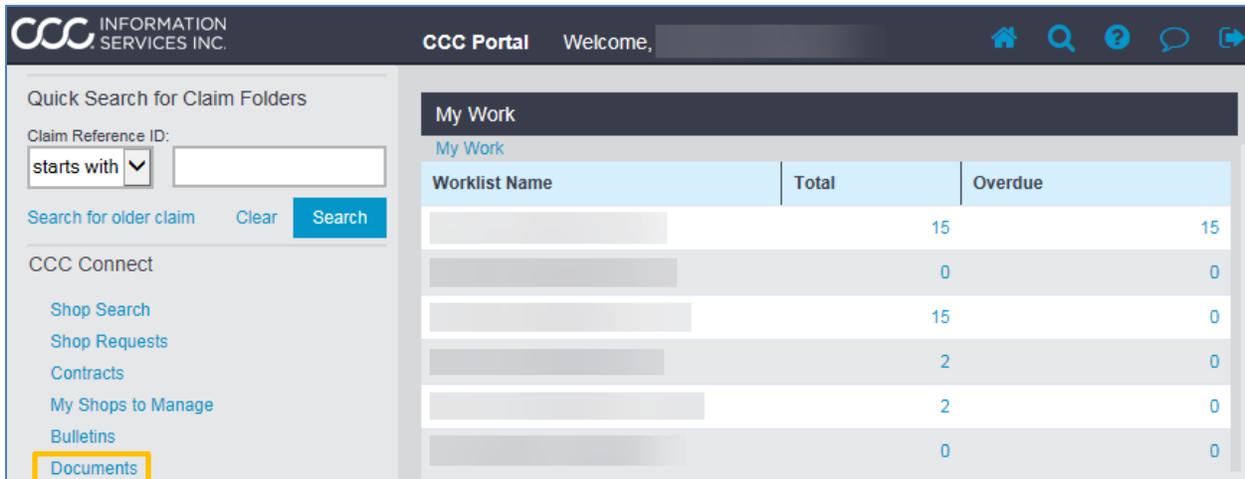
CCC® Connect Documents allows you to communicate important information such as new or updated regulations, policies or guidelines to In-Network shops quickly and easily. Documents must be in PDF format to be uploaded. Users can send those documents to all shops or specific shops as needed. This job aid describes how to:

- Upload Documents
- View Un-Published & Published Documents
- Edit/Replace Documents
- Un-publish Documents

## Access Connect Documents

Use the following steps to access the Documents feature:

Step	Action
1	Once logged into CCC Portal, go to the left panel and locate <b>CCC Connect</b> .
2	Click on <b>Documents</b> .



The screenshot shows the CCC Portal interface. The top navigation bar includes the CCC logo, 'INFORMATION SERVICES INC.', 'CCC Portal', and a user greeting. The left sidebar contains a search section and a 'CCC Connect' menu with links for Shop Search, Shop Requests, Contracts, My Shops to Manage, Bulletins, and Documents (highlighted with a yellow box). The main content area displays a 'My Work' section with a table of worklists.

Worklist Name	Total	Overdue
[Redacted]	15	15
[Redacted]	0	0
[Redacted]	15	0
[Redacted]	2	0
[Redacted]	2	0
[Redacted]	0	0

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## Upload Documents, Continued

**Upload Documents** The Document page displays with existing documents listed. Use the following steps to upload the new PDF document.

The screenshot shows the 'Documents' page in CCC Connect. At the top, there are tabs for 'Published', 'Un-Published', and 'All'. Below the tabs is a table of documents. The table has the following columns: Last Modified Date, Name, Uploaded By, Version, State(s), Audience, and Actions. A yellow arrow points to the 'Add Document' button at the bottom left of the table.

Last Modified Date	Name	Uploaded By	Version	State(s)	Audience	Actions
06/26/2020 11:41 AM CDT	Pricing		1	IL	All Shops	
05/29/2020 04:30 PM CDT			1	All States	In Network Shops	
04/01/2020 04:24 PM CDT			1	All States	All Shops	
03/30/2020 04:34 PM CDT			1	All States	All Shops	
12/30/2019 03:31 AM CDT			1	All States	All Shops	
07/12/2019 04:21 PM CDT			2	CA,FL,IL, TX	In Network Shops	
07/12/2019 04:04 PM CDT			2	TX	All Shops	
07/12/2019 03:54 PM CDT			2	CA,IL	All Shops	
03/12/2019 03:17 PM CDT	Contract Agreement.pdf		1	IL	All Shops	
02/25/2019 04:00 PM CDT			1	CA,IL	All Shops	
06/14/2018 01:28 AM CDT			1	IL	All Shops	
06/13/2018 11:51 PM CDT			1	NV	All Shops	
06/13/2018 11:50 PM CDT			1	AK,AZ	Out of Network Shops	
06/13/2018 11:49 PM CDT			1	All States	All Shops	
06/13/2018 11:49 AM CDT			1	All States	Out of Network Shops	

At the bottom left of the table is a blue button labeled 'Add Document'. At the bottom right, there is a pagination indicator: '< 1 - 15 of 25 >'. A yellow arrow points from the 'Add Document' button to the 'Contract Agreement.pdf' row in the table.

Step	Action
1	Click <b>Add Document</b> at the bottom of the Documents page.
2	Enter a unique <b>Name</b> for the document. If you do not add a Name, then the system will use the PDF filename.

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## Upload Documents, Continued

### Upload Documents, continued

Step	Action
3	<p>Click <b>Upload</b> and select the PDF file to upload.</p> <p>(The document must be a PDF and 10 MB maximum size)</p>
4	<p>Select the <b>State(s)</b> the document will be published to. All shops within a State selection will be able to see the document if they meet the Audience criteria.</p>
5	<p>Select the <b>Audience</b> that will be able to view the document. You can choose All, In Network, or Out of Network Shops.</p>
6	<p>Click <b>Save</b>. The new Document will be published and available to the selected audience in the selected states immediately.</p>

You will receive a warning if you enter a duplicate Name.

### View Documents

You can view existing, published Documents and see their history on the Documents page.

Documents							
Published		Un-Published	All				
Last Modified Date	Name	Uploaded By	Version	State(s)	Audience	Actions	
06/26/2020 11:41 AM CDT	<a href="#">Pricing</a>		1	IL	All Shops		
05/29/2020 04:30 PM CDT			1	All States	In Network Shops		
04/01/2020 04:24 PM CDT			1	All States	All Shops		

Link to view PDF document

Link to view a version

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## Upload Documents, Continued

### Edit Documents



Click the **Edit** icon to update an existing Document with a new PDF.

Click on **Update Document**. Browse to the new PDF and then click **Publish**.

Notice that the State(s) and Audience remain the same.

When ready, click Publish to upload the new version.

The Version column increments with the update.

Last Modified Date ▼	Name	Uploaded By	Version	State(s)	Audience	Actions
06/26/2020 11:41 AM CDT	Pricing		2		All Shops	

### Unpublish Documents

You can also “unpublish” a document. ***It is important to note that unpublished documents cannot be republished.*** If you unpublished in error or find that you need the document again, you will have to upload it as a “new” document again.

- Click the **Un-publish** link. Click **Yes** to confirm that you want to make this document unavailable to any of your Network shops. It will still be available to Insurance Company users.

Now that the Document is published, it's time to send out a Bulletin.

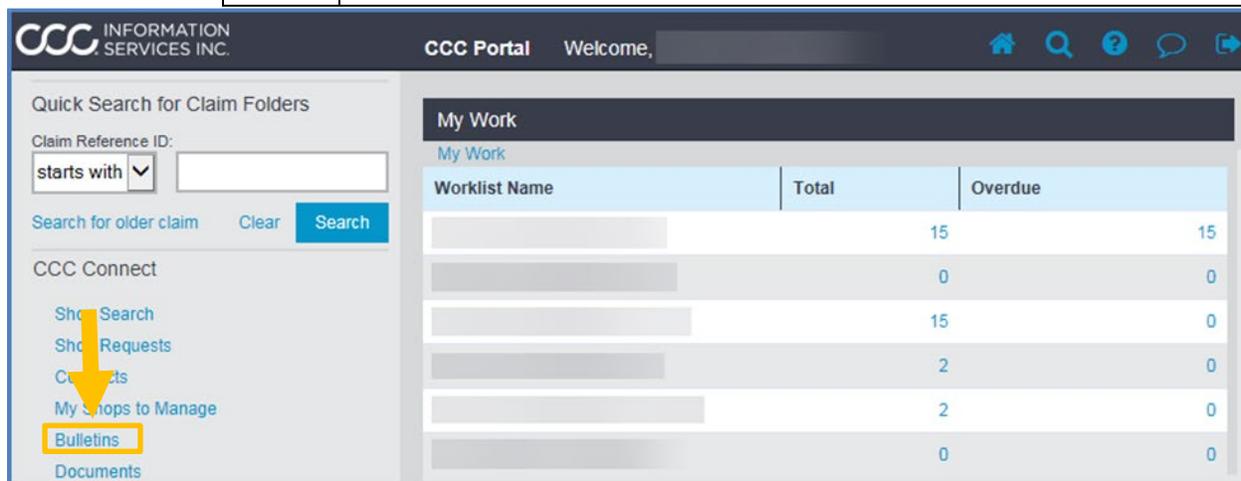
## Create & Send Bulletins

**Introduction** CCC® Connect Bulletins allows you to send notices (not mandatory) to all Network shops, shops in specific States, or a custom list of Shops. These notices can be new guidelines or regulations or notice of a new document or contract. This job aid demonstrates how to create and send a Bulletin to Network shops.

### Access Bulletins

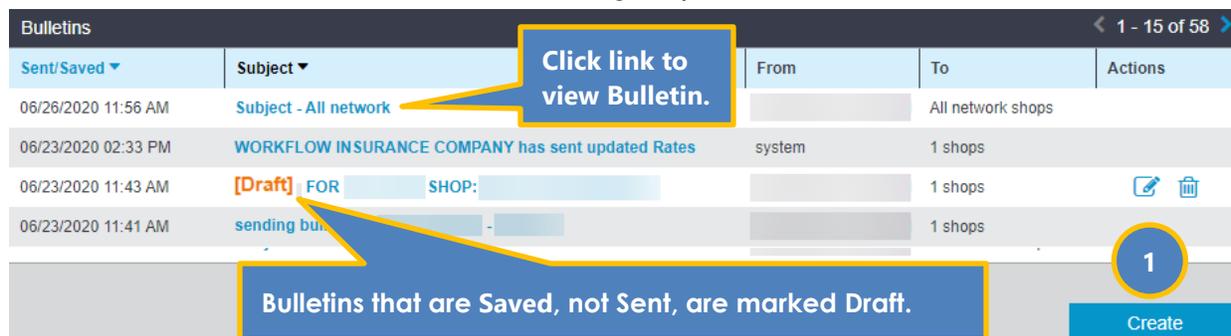
Use the following steps to access the Documents feature:

Step	Action
1	Once logged into CCC Portal, go to the left panel and locate <b>CCC Connect</b> .
2	Click on <b>Bulletins</b> .



### Create Bulletin

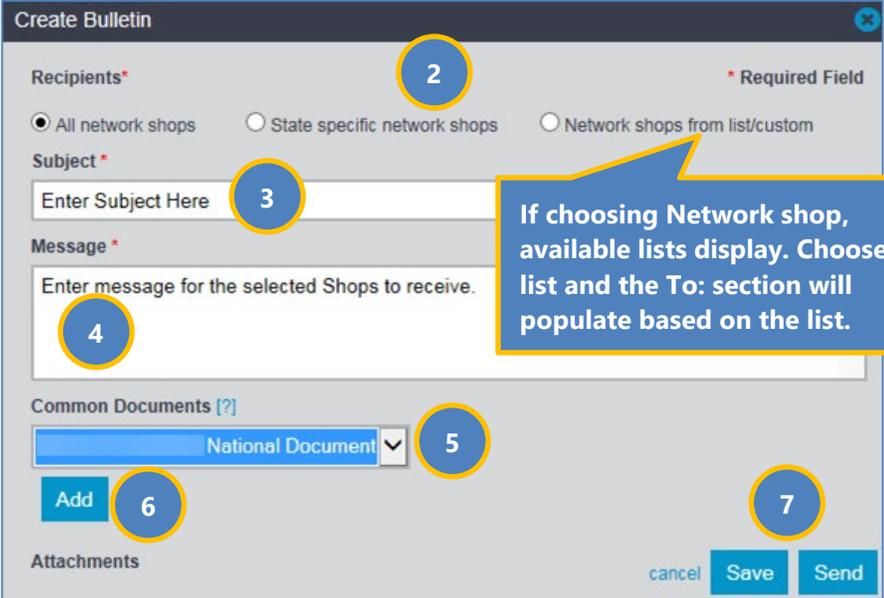
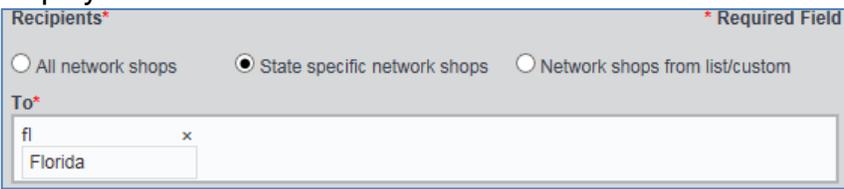
The Bulletins page displays with all of the currently Saved and Sent Bulletins. Use the following steps to create a Bulletin:



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## Create & Send Bulletins, Continued

### Create Bulletin, continued

Step	Action
1	Scroll to the bottom of the Bulletins page and click <b>Create</b> .
	
2	<p>On the <b>Create Bulletins</b> page, select the intended Shop <b>Recipients</b> for this Bulletin.</p> <p>If you select <b>State-specific</b> network shops, the To: field displays to select the states.</p> 
3	Enter the <b>Subject</b> line for this Bulletin. (256 characters max)
4	Enter the <b>Message</b> to send to the selected Shops. (20,000 characters max)
5	Use the <b>Common Documents drop list</b> to select published Document(s) or <b>Browse</b> to locate a local document(s) if you choose <b>Network shops from list/custom</b> as Recipient type.
6	Click <b>ADD</b> to add the selected document(s).
7	<p>Click <b>Save</b> if you do not want to send the Bulletin yet or may wish to edit it.</p> <p>Click <b>Send</b> if you want to send it immediately to the Recipients.</p>

Creating a bulletin to "Network shops from list/custom" lets you also browse and upload any private PDF document that was not published.

If choosing Network shop, available lists display. Choose a list and the To: section will populate based on the list.

## View/Edit/Delete Bulletins

**Introduction** Once you have created CCC® Connect Bulletins, you can then review them as needed. If they are saved as Drafts, you can edit or delete Bulletins. This job aid describes how.

**View/Edit Bulletins** You can view existing, published Documents and see their history on the Documents page.

Sent/Saved	Subject	From	To	Actions
06/26/2020 11:56 AM	Subject - All network		All network shops	
06/23/2020 02:33 PM	WORKFLOW INSURANCE COMPA		1 shops	
06/23/2020 11:43 AM	[Draft] FOR SHOP:		1 shops	
06/23/2020 11:41 AM	sending bulletin to		1 shops	

Buttons: Link to view PDF document, Create

**Edit Bulletins** Click the **Edit icon** to update a Saved (Draft) Bulletin. Click **Send** to send it immediately to the selected Shops.

Sent/Saved	Subject	From	To	Actions
06/26/2020 11:56 AM	Subject - All network		All network shops	
06/23/2020 02:33 PM	WORKFLOW INSURANCE COMPANY has sent updated Rates	system	1 shops	
06/23/2020 11:43 AM	[Draft] FOR SHOP:		1 shops	
06/23/2020 11:41 AM	sending bulletin to		1 shops	

Buttons: Create

**Delete Bulletins** As mentioned earlier, you can only delete Bulletins that are Draft, that is, saved but not sent. Click the **Delete icon** to remove a Saved (Draft) Bulletin.

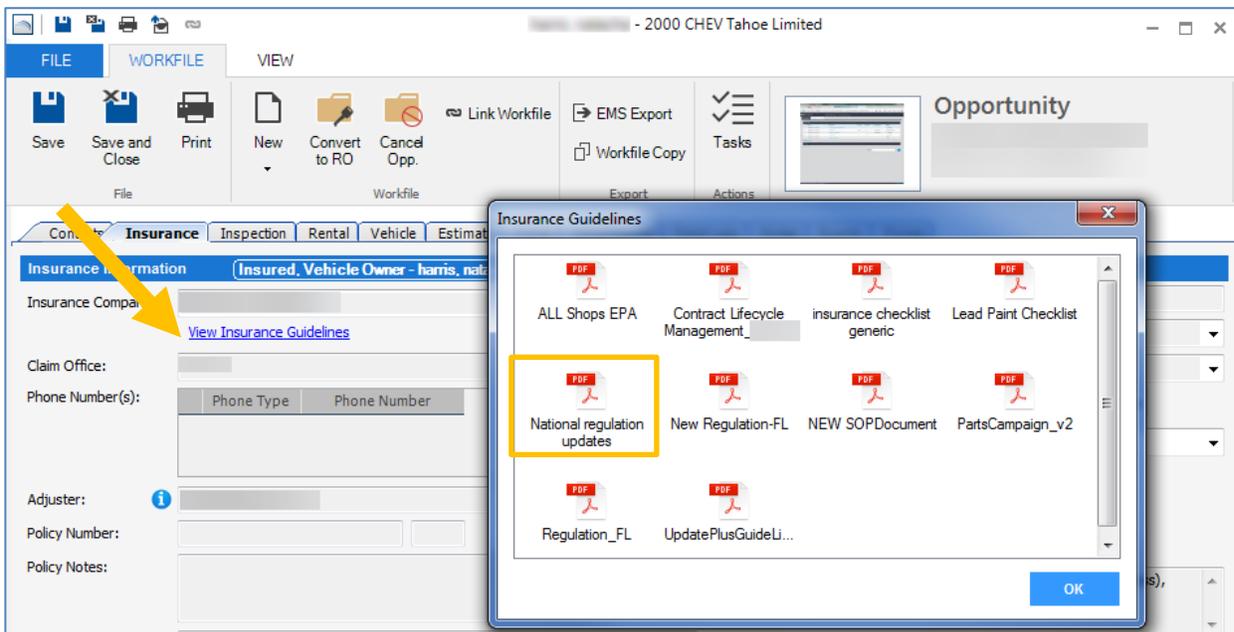
The system will confirm that you really want to delete it. Click **Yes** to complete the process or **No** to close the popup.



## What the Shop Sees

**Introduction** Both CCC ONE and non-CCC ONE network shops will be able to receive and view Documents and Bulletins, albeit differently. This job aid provides information on how both types of shops will receive Documents and Bulletins.

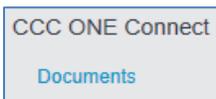
**Shop Documents** **CCC ONE Shops**  
 Documents shared with CCC ONE shops are available in the workfile on the **Insurance** tab. The shop user clicks on the **View Insurance Guidelines** link.



A window pops up with all available documents that have been shared to this shop by the Insurance Company associated with the claim.

The shop user clicks on a PDF to open it and can print or download it from there. CCC ONE shop users can also go to their Inbox to view Bulletins with the Document links as shown in the Bulletin section below.

### **Non-CCC ONE Shops**

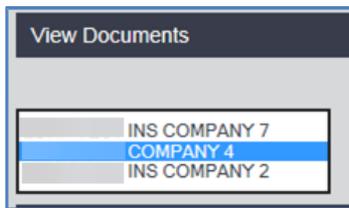


Documents shared with non-CCC ONE shops are available on mycccportal.com. These shop users will locate **CCC Connect** on the left panel and click on **Documents**.

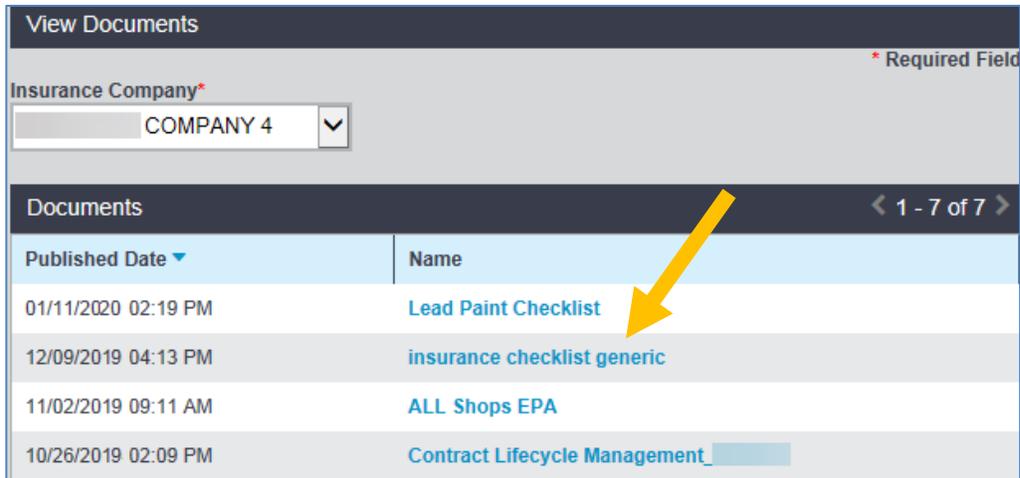
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## Job Aid: What the Shop Sees, Continued

### Shop Documents, continued



Next, they will filter the Documents by selecting the Insurance Company whose documents they want to view from the drop list. A list of available documents displays for Non-CCC ONE shop users to select.



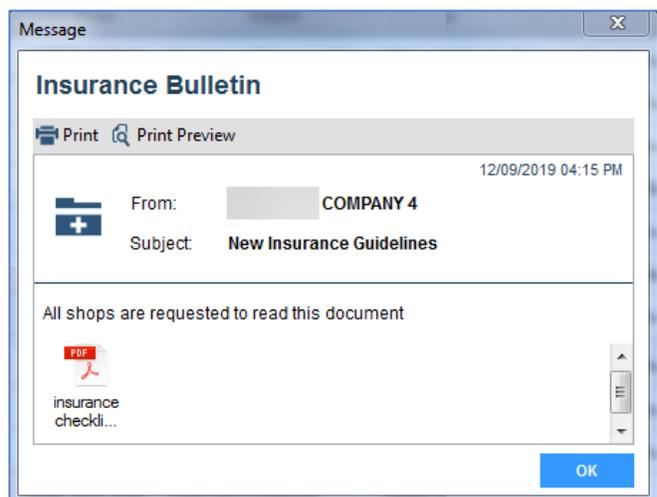
The shop user simply clicks on the Name of the document to open it.

### Shop Bulletins

#### CCC ONE Shops

Bulletins (and any linked Documents included with them) are sent to CCC ONE Shop users as Insurance Messages.

CCC ONE shop users can go to the Message icon or the Action Center on cccone.com and open My Inbox and select Insurance Company to view the message.



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## Job Aid: What the Shop Sees, Continued

### Shop Bulletins, continued

#### Non-CCC ONE Shops

Non-CCC ONE shops can view the last 8 Bulletins from their Portal Home page on mycccportal.com as a worklist.

Bulletin			
New	Received	From	Subject
★	07/06/2016 03:05 PM	WORKFLOW INSURANCE COMPANY	's bulletin to [redacted]
★	07/06/2016 03:03 PM	WORKFLOW INSURANCE COMPANY	's bulletin to all
	07/05/2016 02:47 PM	WORKFLOW INSURANCE COMPANY	Bulletin to all network shops

Showing 8 of 131 Results

Click here to see ALL Bulletins.

- ★ New Bulletins have a star icon.
- Bulletins with attachments will have a paper clip icon.

Non-CCC ONE shop users click the **Subject** link to open the Bulletin details.

Finally, they can click on the Attachment link in the Bulletin details to open the PDF document.

**View Bulletin** CCC

**Received**  
07/06/2016 03:05 PM

**From**  
WORKFLOW INSURANCE COMPANY

**Subject**  
's bulletin to [redacted]

**Message**  
's bulletin to [redacted]

**Attachments**  
[This document is for States - CA, FL 1\\_EstimatePrintImage.pdf](#)