

Manage Your Shops

Introduction

CCC Connect includes a section called **My Shops to Manage**. This Action Board allows DRP Coordinators and other Insurance users with the proper permissions to view and manage their DRP shops. Supervisors can also view or manage their direct report's shops as needed. This job aid provides an overview of the My Shops to Manage Action Board.

Locate My Shops to Manage



Once logged into the CCC Portal, locate the CCC Connect section on the left side panel. Click the **My Shops to Manage** link to open the Action Board.

The Manage Shops Action Board page displays for you to perform the following tasks:

- Search for Shops by your own list of Shops or a Subordinate's List.
- Filter Shops by Shop Name and/or by State.

Once the list of shops display, you can do the following actions:

- Review key information about the shops.
- Remove Shops from your Management Hierarchy.
- Add and view Notes.

The rest of this job aid will describe these key features and functionality.

The screenshot shows the 'My Shops' interface. Callout 1 points to the search criteria section, which includes a 'Shop Name' text input and a 'State' dropdown menu. Callout 2 points to the table header, which lists various columns such as Facility, LOID/PRID, Location, ORG, Score, Claims, Revised Type, Shop Status, GARG, GENL, UMB, WORK, Invitation Status, Last Note, Last Note Date, and Action. Callout 3 points to a 'Remove as Shop Manager' button at the bottom left. Callout 4 points to the 'Action' column in the table, which contains icons for adding (+) and viewing (eye) notes for each shop entry.

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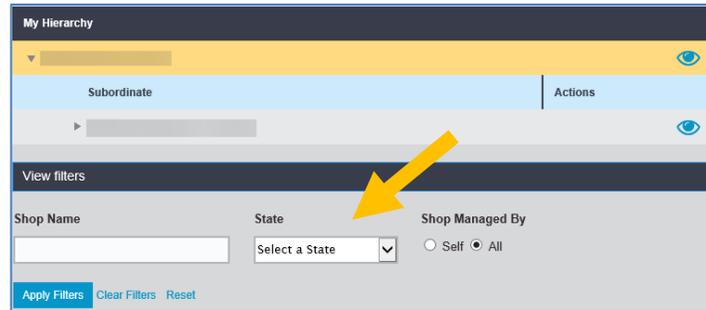
Manage Your Shops, Continued

(1) Searching for Shops

The first step is to search for your Shops to manage. You can either search for one or more of your own Shops to manage OR, if you have the proper permissions, you can search and view your Subordinate's Shop lists. Let's take a quick look at how to do each.

Search My Shops

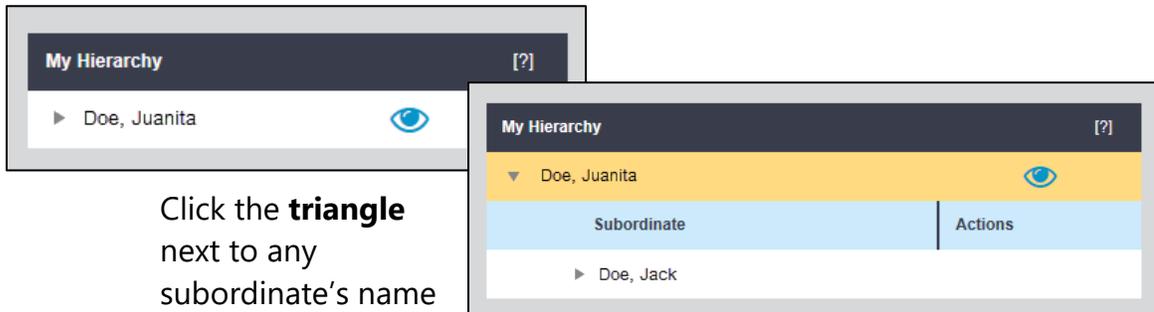
When searching for your own Shops, simply keep the My Shops checkbox selected and then click on View Filters.



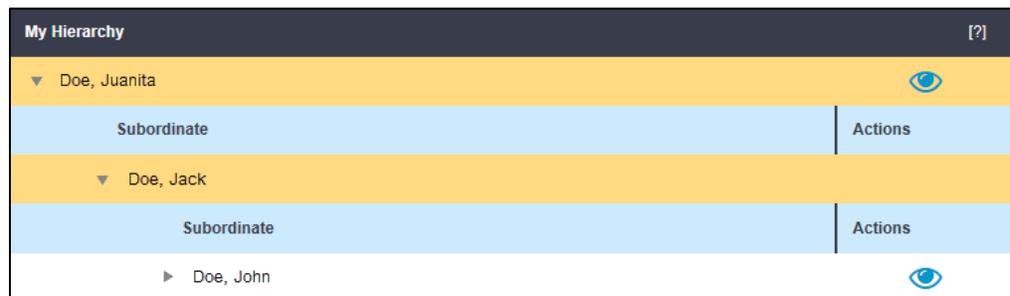
Begin typing a Shop name and the system will begin searching and displaying results as you type. **Tip!** Enter a State to narrow your results. You can apply your filters, clear them, or reset and start over.

Subordinate's List

If you are a Manager or Supervisor responsible for at least one subordinate, you have access to the **My Hierarchy** zone. Click on the **triangle** next to your name to view your hierarchy.



Click the **triangle** next to any subordinate's name to view their subordinate(s). Click a **triangle** again to collapse the view.

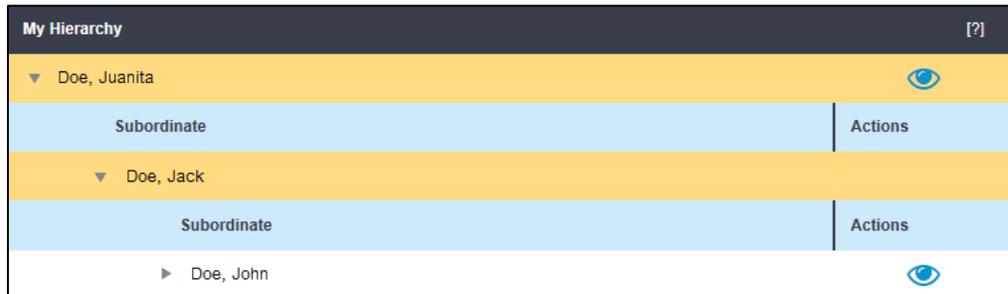


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Manage Your Shops, Continued

Searching for Shops, continued

Click the **triangle** next to any subordinate's name to view their subordinate(s). Click a **triangle** again to collapse the view.



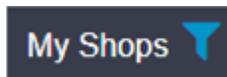
View shops to which you're assigned as Manager by clicking the **View** icon to the far right of your name; view shops to which a subordinate is assigned as Manager by clicking the **View** icon to the far right of their name.



Clicking the **View** icon next to a subordinate's name opens a popup window that displays the shop(s) to which they are assigned as Manager.

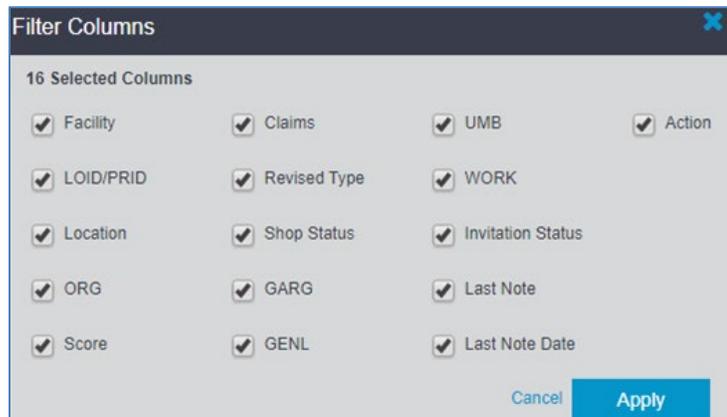
(2) Action Board Overview

Prior to reviewing how to remove Shops from your (or your subordinate's) hierarchy and adding notes or attachments, we should take a quick look at how you can customize the columns to view just the information that is important to you.



Click the **filter icon** to the right of the **My Shops** header. A popup with the list of options displays. See the table below for a quick description of each column.

Click **Apply** to save your changes.



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Manage Your Shops, Continued

Action Board Overview, Here is the list of the options.
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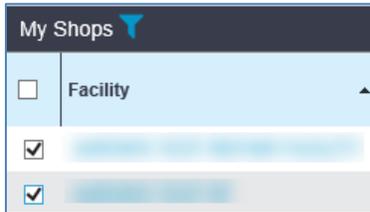
Column	Description
Facility	Shop Name which links to the Shop Profile
LOID/PRID	Location ID and Relationship ID in the CCC database. Only DRP shops will display a Relationship ID.
Location	Shop City and State Location
ORG	Identifies whether the Shop is an SSO or MSO.
Score	Shows the Shop's current DRP Scorecard score.
Claims	Number of claims sent to the Shop in the last month and for a rolling 12 months
Revised Type	Shop Type (OS=Open Shop, DRP, NOS=Not Open Shop (shop initiated), DOS=Disabled Open Shop (insurer initiated))
Shop Status	Out of Network or In Network
GARG	Expiration date for Shop's Garage Keeper policy
GENL	Expiration Date for Shop's General Liability policy
UMB	Expiration date for Shop's Umbrella policy
WORK	Expiration date for Shop's Workers' Compensation policy
Invitation Status	Shop's current Connect invite status
Last Note & Last Note Date	Displays category of the most recent note that was added to the Shop or the first 17 characters of the note's Subject text. The Date option displays when it was added.
Actions	Add and/or view Shop Notes.

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Manage Your Shops, Continued

(3) Remove Shops From List

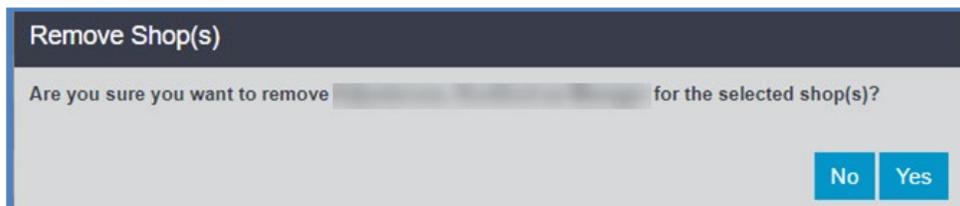
As mentioned at the beginning of this document, you can also use this Action Board to remove selected Shops from your management hierarchy.



To do this, simply select the Shop(s) to remove and then click the **Remove as Shop Manager** button.

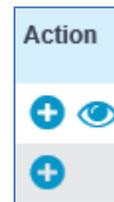


You will be prompted to ensure that you want to take this action as it will permanently remove the selected Shops from the selected Manager's list.



(4) Add Notes

The last feature to review is how to add or view notes on the Action Board. Simply go to the Action column for the selected Shop. Use the + sign to add a new Note. If the column has an "eye" icon, then there are existing Notes and attachments that you can review. A new tab will display with the Note and/or attachments for that Shop.



Adding Note/Attachment

When adding a Note or attachment, select the **Category**, enter a **Subject**, and a **Description**. Click **Attach** if needed to add a document to the claim. When ready, click **Save** to finish.