

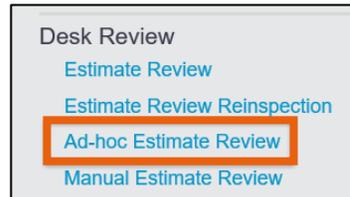
CCC® Portal - Ad-hoc Estimate Review

Overview In Estimate Review, only the latest Estimate/Supplement can be reviewed. Ad-hoc Estimate Review provides the ability to select the Estimate / Supplement version to review. This provides the flexibility for a manager or auditor to create a review on the same version as the original reviewer. The user can select to review the: E01, S01, S02, S03, or S04. **Note:** Ad-hoc Estimate Review is NOT intended for requesting changes or a supplement.

Ad-Hoc Estimate Review

We begin with the Claim already open in the CCC® Portal.

1. Click the **Ad-hoc Estimate Review** link in the Claim Folder's left side panel.



The Estimate Review "Pick List" displays. This page provides a view of the available Estimates and Supplements that can be reviewed.

This page displays the following data about each Estimate/Supplement:

- **Type:** Indicates Estimate or Supplement
- **Version:** Version of the Estimate or Supplement
- **Original Amount:** Total Cost of Repair for the Estimate or Supplement
- **Appraiser:** Name of the Appraiser who wrote the Estimate or Supplement
- **Date Received:** Date and Time the Estimate or Supplement was Received
- **Estimate Review:** A checkbox in this field indicates that an Estimate Review has been created
- **Date Created:** Date and Time the Estimate Review was created
- **Reviewer:** Name of the person who created the Estimate Review



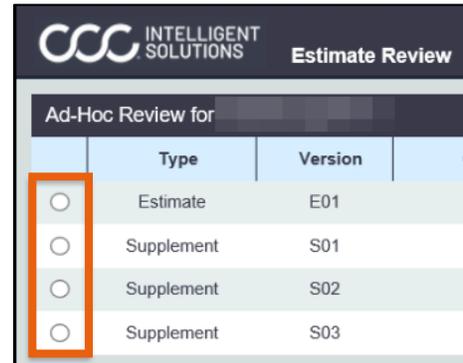
The screenshot shows the CCC Intelligent Solutions Estimate Review interface. It includes a header with the CCC logo and the text 'Estimate Review'. Below the header is a search bar labeled 'Ad-Hoc Review for'. At the bottom, a table header is visible with the following columns: Type, Version, Original Amount, Appraiser, Date Received, Estimate Review, Date Created, and Reviewer.

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CCC® Portal - Ad-hoc Estimate Review, Continued

Ad-Hoc Estimate Review, continued

2. Select the radio button of the **E01**, **S01**, **S02**, **S03**, or **S04** from the list to review.
3. With the appropriate Estimate or Supplement to review selected, click the **Ad-hoc Review** button.



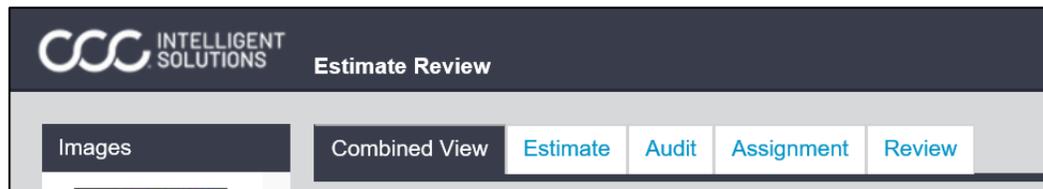
A screenshot of the "Estimate Review" screen in the CCC Intelligent Solutions portal. The page title is "Estimate Review". Below the title is a section "Ad-Hoc Review for" followed by a blurred area. Below this is a table with the following data:

	Type	Version
<input type="radio"/>	Estimate	E01
<input type="radio"/>	Supplement	S01
<input type="radio"/>	Supplement	S02
<input type="radio"/>	Supplement	S03

The radio button for the first row (Estimate E01) is highlighted with a red rectangular border.

The Ad-hoc Estimate Review screen displays with the following tabs:

- **Combined View:** Displays Information for the Estimate/Supplement.
 - **Estimate:** Displays Latest Estimate/Supplement PDF.
 - **Audit:** Displays Latest Audit Report PDF.
 - **Assignment:** Displays Assignment PDF.
 - **Review:** Displays Latest Review PDF.
- If there is a Compare report, the latest Compare Report PDF will be displayed. If there is no Compare report, the latest Reinspection Report PDF will be displayed. If there is no review, nothing will be displayed.



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CCC® Portal - Ad-hoc Estimate Review, Continued

Ad-Hoc Estimate Review, continued

4. Select the desired Estimate/Supplement **line(s)**.
5. Make sure **Perform Ad-hoc Estimate Review** is selected from the Actions drop-down menu and click **Go**.

The screenshot displays the CCC Portal interface for an Ad-hoc Estimate Review. At the top, there are tabs for 'Combined View', 'Estimate', 'Audit', 'Assignment', and 'Review'. Below these is a dropdown menu with 'Perform Ad-Hoc Estimate Review' selected, and a 'Go' button highlighted with a red box and the number 5. The 'Information' section shows details like Reinspection Status (Started), Audit Score (3285), Estimate Version (\$17), TCOR (\$17,580.72), Performed (Before Repair), and Last Reviewer (REINSPECTORTWO, SALT). The 'Estimate' section shows a table with columns for Line, Audit, Smart Audit, Operation, and Description. Lines 2, 3, 4, and 5 are selected with checkboxes, and the number 4 is highlighted next to line 5.

Line	Audit	Smart Audit	Operation	Description
<input type="checkbox"/> 1				FRONT BUMPER
<input checked="" type="checkbox"/> 2				O/H front bumper
<input checked="" type="checkbox"/> 3			REPLACE	Bumper assy
<input checked="" type="checkbox"/> 4				Add for Clear Coat
<input checked="" type="checkbox"/> 5				Add for brush guard
<input type="checkbox"/> 6				Add for fog lamps

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CCC® Portal - Ad-hoc Estimate Review, Continued

Ad-Hoc Estimate Review, continue

Estimate section:

- **Line:** Displays the line number for the estimate or supplement. The checkbox is disabled if the line item is a header. **Note:** For non-CCC ONE written estimates, the line numbers may appear out of order, and the checkbox could be enabled for a header row. This occurs because the EMS data is translated to the Pathways XML format.
- **Audit:** The lightbulb icon indicates that the line item triggered an audit rule. Click the icon to view the Audit rule data.
- **Smart Audit:** The purple flag icon indicates that the line item triggered a smart audit rule. Click the icon to view the Smart Audit rule data. **Note:** Smart Audit is configurable by carrier.
- **Operation:** Displays the current operation for the line item such as REPLACE, REPAIR, etc.
- **Description:** Displays the description of the line item.
- **Part Number:** Displays the part number for the line item (if available).
- **Qty:** Displays the quantity of parts for this line item.
- **Price:** Displays the part's price. **Note:** This reflects the total part price for the line, including if there are multiple quantities.
- **Labor:** Displays the total labor hours for the line.
- **Paint:** Displays the total paint hours for the line.
- **Notes:** An icon displays if there are estimate line notes associated to the line. Hover over the icon to display the estimate line notes.

Line	Audit	Smart Audit	Operation	Description	Part Number	Qty	Price	Labor	Paint	Notes
<input type="checkbox"/> 1				FRONT BUMPER		0	\$ 0.00	0	0	
<input checked="" type="checkbox"/> 2				O/H front bumper		0	\$ 0.00	1.6	0	
<input checked="" type="checkbox"/> 3			REPLACE	Bumper assy	DPC000150PMA	1	\$ 750.00	0	1.8	
<input checked="" type="checkbox"/> 4				Add for Clear Coat		0	\$ 0.00	0	0.7	
<input checked="" type="checkbox"/> 5				Add for brush guard		0	\$ 0.00	0.4	0	
<input type="checkbox"/> 6				Add for fog lamps		0	\$ 0.00	0	0	
<input type="checkbox"/> 7			REPLACE	LT Mount bracket bolt	FB110227	1	\$ 4.37	0	0	
<input type="checkbox"/> 8				ROOF		0	\$ 0.00	0	0	
<input checked="" type="checkbox"/> 9			REPLACE	Roof panel without roof rail end	1001121	1	\$ 1,000.00	16	6.6	

Note: A lightbulb icon in the Estimate section header indicates that there are audit rules that have been triggered that are not at the line level. Select the icon to display these General Audit Rules.

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CCC® Portal - Ad-hoc Estimate Review, Continued

Ad-Hoc Estimate Review, continued

Audit icon:

The Audit details will be displayed when the user selects the yellow lightbulb next to the line number. The following details will be displayed:

Line	Audit	Smart Audit	Operation	Description	Part Number	Qty	Price	Labor	Paint	Notes																				
1	Lightbulb icon			FENDER		0	\$ 0.00	0	0																					
<table border="1"> <thead> <tr> <th>Rule Description</th> <th>Actual</th> <th>Rule</th> <th>Variance</th> <th>Score</th> </tr> </thead> <tbody> <tr> <td>WFIC EL2 Vehicle Loc NOT FL NV OR TX</td> <td></td> <td></td> <td>0</td> <td>9</td> </tr> <tr> <td>WFIC EL2: A rating exists and it is NOT 1001</td> <td></td> <td></td> <td>0</td> <td>1</td> </tr> <tr> <td>WFIC EL2 RF DRP estimate</td> <td></td> <td></td> <td>0</td> <td>1</td> </tr> </tbody> </table>											Rule Description	Actual	Rule	Variance	Score	WFIC EL2 Vehicle Loc NOT FL NV OR TX			0	9	WFIC EL2: A rating exists and it is NOT 1001			0	1	WFIC EL2 RF DRP estimate			0	1
Rule Description	Actual	Rule	Variance	Score																										
WFIC EL2 Vehicle Loc NOT FL NV OR TX			0	9																										
WFIC EL2: A rating exists and it is NOT 1001			0	1																										
WFIC EL2 RF DRP estimate			0	1																										
2	Lightbulb icon	Flag icon	REPLACE	LT Fender	56022321AA	1	\$ 399.00	1.8	2.2																					
3		Flag icon		Add for Clear Coat		0	\$ 0.00	0	0.9																					
4		Flag icon		Add for Edging		0	\$ 0.00	0	0.5																					

General Audit Rules:

These generic audit rules display when the lightbulb icon in the Estimate section header is clicked. The General Audit Rules window provides all the general (not line specific) audit rules that were triggered for the latest estimate or supplement.

Rule Description	Actual	Rule	Variance	Score
WFIC Claim exists			0	1001
WFIC The Agreed Price Conf is FALSE			0	1000
Odometer exceeds 50,000 miles	75000.00	50000.00	25000	1000
CheckValue (Profile): Paint Supplies Rate exceeded	25.00	5.00	20	80
Image Labels - Front image not provided by appraiser			0	25
Image Labels - Rear image not provided by appraiser			0	25
CheckValue (Fire when CV exists): Diagnostic Rate does NOT match	55.00	7.00	48	10
CheckValue (Profile): Body Supplies Rate does NOT match	25.00	10.00	15	10
CheckValue (Profile): Glass Labor Rate does NOT match	55.00	8.00	47	10
Claim Exists - RF			0	8

- **Rule Description:** Displays the audit rule description.
- **Actual:** Displays the line item value from the line item that was used to trigger the rule.
- **Rule:** Displays the threshold value from the rule.
- **Variance:** The difference between the actual value and the rule value
- **Score:** Displays the score value associated to the rule.

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CCC® Portal - Ad-hoc Estimate Review, Continued

Ad-Hoc Estimate Review, continued

- The Ad-Hoc Estimate Review details display. Select or enter the appropriate information in all applicable fields. **Note:** Reinspection Type and Performed are required fields.
 - Reinspection Type***: Provide details around the type of Reinspection: Photo, Physical or Video.
 - Location Type:** Provide information regarding where the reinspection occurred: Desk, Drive-In, Field, Home, Non Drive-In, Other, Repair Facility, Salvage Yard, Virtual, or Work.
 - Location Name:** Provide a name for the location of where the review was performed. Maximum character entry is 100 characters.
 - Performed***: Provide details regarding when the review was performed: Before Repair, During Repair, After Repair, or Total Loss.
 - Classifications:** Classify why the review was performed. Values are from the Classifications defined for the Insurance Company or the default Classifications of: Verifying, Reporting, or Training.
 - Overall Rating:** Indicate the Overall rating for the review. Values are from the Overall Ratings defined for the Insurance Company or the Default Overall Ratings of: Excellent, Good, Fair, Poor, and Not Applicable.
 - Agreement Reached:** Indicate if an agreement has been reached. Values are: Yes or No.
 - Discussed With:** Indicate the name of the individual who they discussed this review with. Maximum character entry is 100 characters.

The screenshot displays the 'Estimate Review' form, specifically the 'Reinspection Details' section. The form contains several fields:

- Reinspection Type ***: A dropdown menu with 'Photo' selected.
- Location Type**: A dropdown menu with 'Desk' selected.
- Location Name**: A text input field.
- Performed ***: A dropdown menu with 'Before Repair' selected.
- Classifications**: A dropdown menu.
- Overall Rating**: A dropdown menu.
- Agreement Reached**: Radio buttons for 'Yes' and 'No'.
- Discussed With:**: A text input field.

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CCC® Portal - Ad-hoc Estimate Review, Continued

Ad-Hoc Estimate Review, continued

- **Line Number:** Line number from the Estimate/Supplement being reviewed that was selected on the Combined View page.
- **Description:** Corresponding line description from the Estimate/Supplement.
- **Category*:** Select the appropriate category. Available drop-down menu options are specific to your company's configuration.
- **Category Description*:** Select the appropriate Category Description. Available drop-down menu options are specific to your company's configuration.
- **Assessment:** Select the appropriate Assessment. Available drop-down menu options are specific to your company's configuration.
- **Comments:** Enter comments about the selected line. Maximum character entry is 250 characters.

See descriptions on next page for the **Price Amount**, **Labor Amount**, and **Paint Hours** fields.

Line	Description	Price Amount	Labor Hours	Paint Hours	Category *
2	NONE O/H front bumper	\$ 0.00	1.6	0	
		Current			Category Description *
		New			Assessment
		Difference			

Comments: Please enter comments...

Upload Images Delete Estimate Line Remove From Review

Note: If available, some reason code and labor hour values may be recommended for review by the Smart Audit AI models.

Note: If the estimate line is flagged by Smart Audit, the purple flag icon will be displayed next to the line number. The **Upload Images** link is only displayed if the logged in user has the appropriate role, configured by the carrier.

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Ad-Hoc Estimate Review, continued

	Price Amount	Labor Hours	Paint Hours
Current	Part price for the selected line from the Estimate. Note: This does NOT include discounts, mark-ups or taxes.	Current labor hours for the selected line from the Estimate.	Current Paint/Refinish Hours for the selected line from the Estimate.
New	Enter the adjusted price amount for the line item.	Enter the adjusted labor hours for the line item.	Enter the adjusted Paint/Refinish Hours for the Line Item.
Difference	Dollar amount difference between the New Price Amount and the Current Price Amount. Negative differences are displayed with parenthesis.	Dollar amount difference between the New Labor Hours and the Current Labor Hours using the associated labor rate. Note: If the labor is body labor, the body supplies will NOT be calculated in the difference. Body Supplies are calculated only at the Totals level	Dollar amount difference between the New Paint Hours and the Current Paint Hours based on the paint labor rate. Note: Paint supplies are NOT calculated in the Difference at the line level - only at the Totals level.

	Price Amount	Labor Hours	Paint Hours
Current	\$ 405.43	3.5	0
New	\$ 405.43	3.5	0
Difference	\$ 0.00	\$ 0.00	\$ 0.00

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CCC® Portal - Ad-hoc Estimate Review, Continued

Ad-Hoc Estimate Review,
continued

- **Delete Estimate Line:** Use as needed to indicate that the Estimate line should be removed on the Supplement.
- **Remove From Review:** Remove this previously selected line from the review.
- **Add Additional Change:** Add a line for a change that is not related to an existing Estimate line or add something to the Estimate that was missed.

The screenshot shows a user interface with a light gray background. At the top, there is a horizontal line. Below the line, there are three buttons. The first button is labeled 'Delete Estimate Line' and has a small square icon to its left. The second button is labeled 'Remove From Review' and is in a light blue color. The third button is labeled 'Add Additional Change' and is in a darker blue color. The buttons are arranged in a row, with the first two on the left and the third on the right.

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CCC® Portal - Ad-hoc Estimate Review, Continued

Ad-Hoc Estimate Review,
continued

Totals: The Totals section automatically updates based on the changes the user makes during the review.

	Cost of Repair	Part Price	Labor	Paint	Body Supplies	Paint Supplies
Original	Total Cost of Repair*	Parts Amount**	\$ for Labor Items without Refinish*	\$ for Paint Labor**	\$ for Body Supplies	\$ for Paint Supplies
Review	TCOR Based on Review **	\$ for Parts Based on Review**	\$ for Labor Based on Review**	\$ for Paint Labor Based on Review**	\$ for Body Supplies Based on Review **	\$ for Paint Supplies Based on Review **
Difference	Review - Original **	Review - Original	Review - Original	Review - Original	Review - Original	Review - Original
Review Over Estimated	Sum of Line Level Changes that were a Negative Difference.					
Review Under Estimated	Sum of all Line Level Changes that were a Positive Difference.					

* Does NOT include Deductible

** Does NOT include Adjustments/Taxes

Totals						
	Cost Of Repair	Part Price	Labor	Paint	Body Supplies	Paint Supplies
Original	\$ 875.00	\$ 570.80	\$ 304.20	\$ 0.00	\$ 0.00	\$ 0.00
Review	\$ 875.00	\$ 570.80	\$ 304.20	\$ 0.00	\$ 0.00	\$ 0.00
Difference	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Review Over Estimated		\$ 0.00		Review Under Estimated	\$ 0.00	

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CCC® Portal - Ad-hoc Estimate Review, Continued

Ad-Hoc Estimate Review,
continued

Estimate Review Comments:

These comments are displayed on the Ad-hoc Estimate Review Report. This field is optional and will allow up to 1,000 characters.



The screenshot shows a rectangular input field with a light gray border. The top portion of the field is a header bar with the text "Estimate Review Comments" in a small, dark font. Below the header bar is a large, empty white area for entering text.

7. **Once the user is finished, they have the following options:**

Select Additional Lines: Saves the current Estimate Review and returns to the Combined View to select additional Estimate lines to include in this review.

Save Review: Save your review and resume it at a later time via the Action: Continue Saved Review.

Preview Report: Generate a preview report in a new window. The report will display "Preview" to indicate that this is not the final report.

Document Only: Generates the Ad-hoc Estimate Review report.

Cancel: Cancels out of this Estimate Review.



The screenshot shows a horizontal row of five buttons. From left to right: a light gray button labeled "Cancel"; a blue button labeled "Save Review"; a blue button labeled "Preview Report"; a blue button labeled "Document Only"; and a light blue link labeled "Select Additional Lines" positioned above the "Document Only" button.