CCC® Portal – Ad-hoc Estimate Review Reinspection

Overview
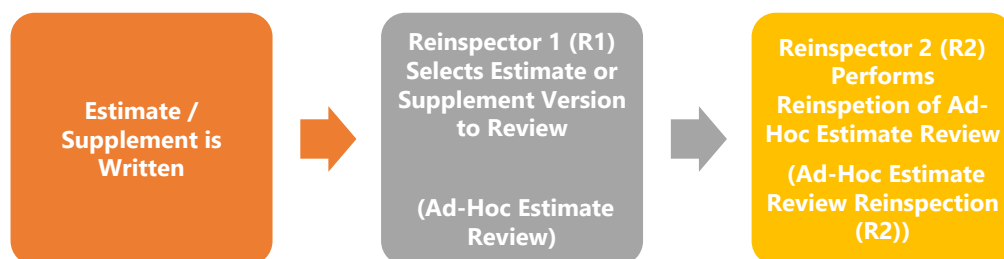
About Ad-hoc Estimate Review

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.

About Ad-hoc Estimate Review Reinspection (R3.2)

Ad-hoc Estimate Review Reinspection provides the ability to reinspect an Ad-Hoc Estimate Review.

Note: In order to perform an Ad-hoc Estimate Review Reinspection, an Ad-hoc Estimate Review must first be completed.

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┌─────────────────┐      ┌─────────────────┐      ┌─────────────────┐
│  Estimate /     │      │ Reinspector 1   │      │ Reinspector 2   │
│  Supplement is  │  ▶   │ (R1) Selects    │  ▶   │ (R2) Performs   │
│  Written        │      │ Estimate or     │      │ Reinspetion of  │
│                 │      │ Supplement      │      │ Ad-Hoc Estimate │
│                 │      │ Version to      │      │ Review          │
│                 │      │ Review          │      │                 │
│                 │      │                 │      │ (Ad-Hoc         │
│                 │      │ (Ad-Hoc         │      │ Estimate Review │
│                 │      │ Estimate        │      │ Reinspection    │
│                 │      │ Review)         │      │ (R2))           │
└─────────────────┘      └─────────────────┘      └─────────────────┘
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This job aid describes how to use Ad-hoc Estimate Review Reinspection to perform a Reinspection on an Estimate or Supplement that has already been reviewed via Ad-hoc Estimate Review.

Note: The user does NOT need to be the assigned Reinspector on the claim to perform an Ad-hoc Estimate Review Reinspection (R3.2).

Only users with the correct permissions can complete an Ad-hoc Estimate Review Reinspection.

Ad-hoc Estimate Review Reinspection (R3.2)

**The following actions must be completed to begin the Ad-hoc Estimate Review Reinspection:**

- Ad-hoc Estimate Review is completed.
- Re-Reinspection Supervisor or audit team member is ready to review the Ad-hoc Estimate Review.

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

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

2. Select the **Estimate line(s)** to review.
   Note: The line(s) that were part of the Ad-hoc Estimate Review are visible and identified. They are **indented** to show the changes. The **lightbulb icon** in the **Audit** column indicates that an Audit rule was fired on the corresponding line.
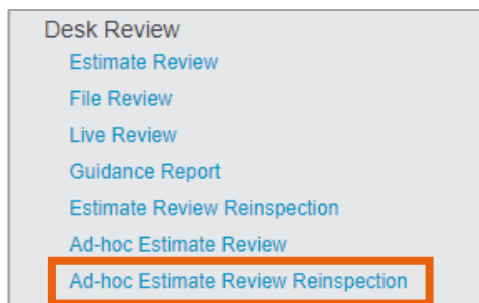
Example of Ad-hoc Estimate Review change made:
Line 3 Bumper Cover Price was changed from $473.33 to $373.33.

Line	Audit	Operation	Description	Part Number	Qty	Price	Labor	Paint
1	💡		**FRONT BUMPER**		0	$ 0.00	0	0
2			O/H front bumper		0	$ 0.00	3.1	0
3	💡	REPLACE	Bumper cover		1	$ 473.33	0	2.8
3	💡	REPLACE	Bumper cover		1	$ 373.33	0	2.8

3. Ensure **Perform Ad-hoc Estimate Review Reinspection** is selected from the Actions drop-down menu and click **Go**.

Combined View | Estimate | Audit | Assignment | Review

Perform Adhoc Estimate Review Reins ▼ | Go
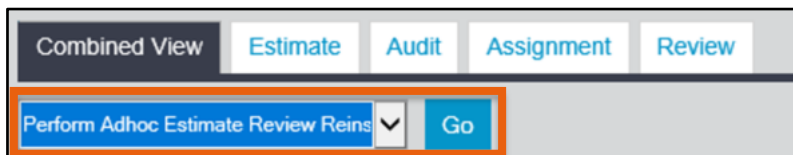
4. The **Ad-hoc Estimate Review Reinspection pop-up window opens** and contains several sections and lines you selected for review. See details on the following pages.

Continued on next page

Ad-hoc Estimate Review Reinspection (R3.2), continued

Section 1: Ad-hoc Estimate Review Details

This section provides key details of the Ad-hoc Estimate Review. **Note:** These fields are read-only fields and <u>cannot</u> be edited.

Click the **+** sign to expand this section as needed.

Collapsed View:

Ad-hoc Estimate Review Reinspection	✖
Ad-hoc Estimate Review Details	**+**

Expanded View:

Ad-hoc Estimate Review Details

Reinspection Type	Review Performed	Agreement Reached	Review Performed By
Physical	Before Repair	○ Yes ○ No	
Location Type	**Classifications**	**Discussed With:**	**Review Performed On**
Desk			10-17-2018 00:25 PM
Location Name	**Overall Rating**		

Field	Description
Reinspection Type	Indicates the Ad-hoc Estimate Review's type of Reinspection.
Location Type	Where the Ad-hoc Estimate Review Reinspection occurred.
Location Name	Location Name of where the review was performed (if applicable).
Review Performed	Details regarding when the review was performed.
Classifications	Why this review was performed. Values are defined for the Insurance Company or the default Classifications of Verifying, Reporting or Training.
Overall Rating	Overall rating for the review. Values are defined for the Insurance Company or the default Overall Ratings of Excellent, Good, Fair, Poor and Not Applicable.
Agreement Reached	Indicates if a discussion happened and if an agreement has been reached Yes or No.
Discussed With	Indicates the name of who the user discussed this review with.
Review Performed By	The logon ID of the user that performed the Ad-hoc Estimate Review.
Review Performed On	The date and time when the Ad-hoc Estimate Review was performed.

Ad-hoc Estimate Review Reinspection (R3.2), continued

Section 2: Perform Ad-hoc Estimate Review Reinspection

Note: * Denotes a Required Field

Field	Description
Line Number	Not Editable – Line number from the Estimate or Supplement being reviewed as selected on the Combined View page.
Description	Not Editable – Description from the Estimate or Supplement being reviewed as selected on the Combined View page.
Category*	Category will pre-populate with the Category selected during the Ad-hoc Estimate Review. If this line was just selected on the Combined View page, this will default to blank.
Category Description*	Category Description will pre-populate with the Category Description selected during the Ad-hoc Estimate Review. If this line was just selected on the Combined View page, it will default to blank.
Assessment	Assessment will pre-populate with the Assessment that was selected during the Ad-hoc Estimate Review. If this line was just selected on the Combined View page, this will default to blank.
Comments	Comments from the Ad-hoc Estimate Review will be pre-populated in this field. This can be modified as needed. The comments as displayed will be saved with the Ad-hoc Estimate Review Reinspection.
Delete Estimate Line	This checkbox allows the user to indicate that the Estimate line should be removed on the Supplement. Once selected, the user will be prompted with a warning message. Once the user confirms they would like to have this line deleted, the system will calculate the Part, Labor and Paint differences, and this line will be marked as DELETE on the Estimate Review Reinspection Report. The Totals update to reflect the change.

Continued on next page

Ad-hoc Estimate Review Reinspection (R3.2), continued

	Price Amount	Labor Hours	Paint Hours
Current	$ 0.00	3.1	0
New	$ 0.00	3.1	0
Difference	$ 0.00	$ 0.00	$ 0.00

	Price Amount	Labor Hours	Paint Hours
Current (Not Editable)	Part price for the selected line from the Estimate. **Note:** Price reflected does NOT include discounts, mark-ups or taxes.	Current labor hours for the selected line from the Estimate being reviewed.	Current paint/refinish hours for the selected line from the Estimate being reviewed.
New (Editable)	If needed, specify adjusted price amount entered by the Desk Reviewer for the line item.	If needed, specify adjusted labor hours for the line item.	If needed, specify adjusted paint/refinish hours for the line item.
Difference (System Calculated)	Dollar amount difference between the New Price Amount and the Current Price Amount. **Note:** Negative differences are displayed with parentheses ( ).	Dollar amount difference between the New Labor Hours and the Current Labor Hours using the labor rate associated with the line for which the labor adjustment is requested. **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, not at the line level.	This dollar amount difference between the New Paint Hours and the Current Paint Hours is based on the paint labor rate on the Estimate. **Note:** Paint supplies are NOT calculated in the Difference at the line level. Paint Supplies are calculated only at the Totals level, NOT at the line level.

Note: For lines that were just selected on the Combined View page but were **not part of the Ad-hoc Estimate Review** the New Amount/Hours display as the Current Amount/Hours when the user first enters the page so that the Difference displays as $0.0.

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Ad-hoc Estimate Review Reinspection (R3.2), continued

If needed, the **Add Additional Change** button allows a user to add a line for a change that is not related to an existing Estimate line or to add something to the Estimate that was missed. When the **Add Additional Change** button is selected, the fields shown in the screenshot below are displayed:

Line: The line number increments based on the last line number displayed on the Combined View page from the Estimate or from the last added line.

See previous pages for descriptions of the other editable fields available through this functionality.

Note: If the Estimate/Supplement being reviewed is a non- CCC ONE® written Estimate/Supplement, the line numbers might not be accurate. The number assigned for the additional change will be based on the last line number displayed on the Estimate/Supplement or based on the last additional change added.

Ad-hoc Estimate Review Reinspection (R3.2), continued

Section 3: Ad-hoc Estimate Review Reinspection Totals

The **Ad-hoc Estimate Review Reinspection Totals** section automatically updates based on the changes the user makes during the review.

Ad-hoc Estimate Review Reinspection Totals						
	Cost Of Repair	**Part Price**	**Labor**	**Paint**	**Body Supplies**	**Paint Supplies**
Original	$ 3,677.25	$ 2,910.25	$ 360.00	$ 195.00	$ 56.00	$ 156.00
Review	$ 3,487.25	$ 2,810.25	$ 310.00	$ 195.00	$ 16.00	$ 156.00
Difference	$ (190.00)	$ (100.00)	$ (50.00)	$ 0.00	$ (40.00)	$ 0.00
Review Over Estimated		$ 190.00	Review Under Estimated		$ 0.00	

	Cost Of Repair
Original	Cost of Repair from the Estimate/Supplement being reviewed. This does NOT include the deductible. This is the Grand Total Amount.
Review	This is the Cost of Repair determined based on the review. **Note:** When you first enter the Estimate Review page, this number might not match the Original Total Cost of Repair because it does not include adjustments or taxes.
Difference	This is the difference between the Review Total Cost of Repair minus the Original Total Cost of Repair. **Note:** The Difference Total Cost of Repair does not include adjustments or taxes. When you first come into this page (see screen shot above), the Review Difference can show a dollar amount that is either higher or lower than the Original Total Cost of Repair. The difference might include discounts, mark-ups, taxes and miscellaneous charges (towing, storage and E.P.C).

	Part Price
Original	Parts amount from the Estimate/Supplement before any adjustments or taxes.
Review	This is the Parts dollar amount determined based on the review. **Note:** The Review Parts Price does not include adjustments or taxes. It is the net total of all the parts from the Estimate/Supplement adjusted for any changes made to part prices during the review.
Difference	Review Parts minus the Original Parts value.
	Labor
Original	Dollar amount for labor items from the Estimate/Supplement and does NOT include refinish or any adjustments or taxes.
Review	This is the dollar amount for labor items determined based on the review. **Note:** The Review Labor does not include adjustments or taxes. It is the net total of all labor amounts from the Estimate/Supplement adjusted for any changes made during the review.
Difference	Review Labor minus the Original Labor value.

**Ad-hoc
Estimate
Review
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continued

	Paint
Original	Dollar amount for paint labor items from the Estimate/Supplement and does not include any adjustments or taxes.
Review	This is the dollar amount for paint items determined based on the review. **Note:** The Review Paint does not include adjustments or taxes. It is the net total of all paint amounts from the Estimate/Supplement adjusted for any changes made during the review.
Difference	**Difference Paint:** Review Paint minus the Original Paint value.

	Body Supplies
Original	Dollar amount for body supplies from the Estimate/Supplement. If the Estimate/Supplement did not have a body supplies rate, this amount will be $0.00. Body Supplies are calculated by multiplying the Body Supplies rate from the Estimate and the appropriate body labor hours.
Review	**Review Body Supplies:** This is the dollar amount for body supplies based on the review. **Note:** The Review Body Supplies does not include adjustments or taxes. It is calculated by multiplying the Body Supplies rate and the appropriate body labor hours determined during the review.
Difference	**Difference Body Supplies:** Review Body Supplies minus the Original Body Supplies value.

	Paint Supplies
Original	Dollar amount for paint supplies from the Estimate/Supplement. If the Estimate/Supplement did not have a paint supplies rate, this will be $0.00. Paint Supplies are calculated by multiplying the Paint Supplies rate from the Estimate and the appropriate paint labor hours, up to the Paint CAP Amount (if applicable).
Review	This is the dollar amount for paint supplies based on the review. **Note:** The Review Paint Supplies does not include adjustments or taxes. It is calculated by multiplying the Paint Supplies rate and the appropriate paint labor hours (up to the Paint CAP, if applicable) based on the review.
Difference	Review Paint Supplies minus the Original Paint Supplies value.

Review Over Estimated: This is the sum of all the line level changes that were a negative difference. This sum is always displayed as a positive number. This is the amount where the appraiser/shop asked for too much.

Review Under Estimated: This is the sum of all the line level changes that were a positive difference. This as the amount where the appraiser/shop did not ask for enough or missed damage.

CCC® Portal – Ad-hoc Estimate Review Reinspection, Continued

Ad-hoc Estimate Review Reinspection (R3.2), continued

Estimate Review ReinspectionType Re-Reinspection	Classifications *	Overall Rating *

Ad-hoc Estimate Review Reinspection Comments

Note: * Denotes a Required Field

Estimate Review Reinspection Type: This is defined as Re-Reinspection.

Classifications*: Classify why this 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

Ad-Hoc Estimate Review Reinspection Comments: Enter comments about the Ad-hoc Estimate Review Reinspection.

Completing the Ad-hoc Estimate Review Reinspection (R3.2)

Save & Select Additional Lines

If you realize that you missed a variance or another change you need to make, click **Save and Select Additional Lines.** This saves the current Estimate Review and go back to the Combined View to select additional Estimate lines to include in this review.

Save Review   Preview Report   Submit

When your review is complete, click **Submit** to submit the Ad-hoc Estimate Review Reinspection.
Note: There is no confirmation message.

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.

After selecting Submit, you will be prompted with the option to **Send Estimate Review Report** to Reinspector. This provides the ability to send the Ad-hoc Estimate Review Reinspection report to the specified email address(es). The Email Address will default to the email address of the assigned reinspector.

You can:
- Deselect the **Send Estimate Review Report** to Reinspector checkbox so that the Estimate Review Report is not automatically sent via email to any recipients.
- Modify the **Email Address** so that a different recipient receives the Estimate Review Report via email.
- Add additional Email Addresses of recipients of the Estimate Review Report. This is done by entering multiple email addresses separated by semicolons.
- Select **Send and Return to Estimate** so that the recipient associated with the default email address receives the Estimate Review Report.

Note: You must click **Send and Return to Estimate** in order to close this window.

Ad-hoc Estimate Review Reinspection Report

The **Ad-hoc Estimate Review Reinspection Report** is generated when an Ad-hoc Estimate Review Reinspection is completed via the CCC® Portal. **See field/section descriptions below. *** Denotes a field which contains a calculation that is customizable by client.

Field / Section	Description
Claim Info	Main Admin Data section.
The Review Date	Date/Time the Estimate Review was created.
Estimate Review Details	Review Estimate Review details here.
Totals by Category / Description	Summary view of the data based on the Category and Category Description selected during the Ad-hoc Estimate Review Reinspection. **R1**= Values from the Ad-hoc Estimate Review Report **R2**= Values from Ad-hoc Estimate Review Reinspection **R1 Diff**= R1 Amount minus Original Amount **%**= R1 Diff divided by Estimate Amount and multiplied by 100 **R2 Diff**= R2 Amount minus Original Amount **%**= R2 Diff divided by Estimate Amount and multiplied by 100 **Variance**= R2 Amount minus R1 Amount **R1 Overwrite %**= Sum of negative percentages from the R1% column **R1 Overwrite $**= Sum of negative dollar amounts from the R1Diff column **R1 Underwrite %**= Sum of positive percentages from the R1% column **R1 Underwrite $**= Sum of positive dollar amounts from the R1 Diff column **R2 Overwrite %**= Sum of negative percentages from the R2% column **R2 Overwrite $**= Sum of negative dollar amounts from the R1Diff column **R2 Underwrite %**= Sum of positive percentages from the R2% column **R2 Underwrite $**= Sum of positive dollar amounts from the R1 Diff column **Overwrite Variance %**= Difference between R2 Overwrite % minus R1 Overwrite % **Overwrite Variance $**= Difference between R2 Overwrite $ minus R1 Overwrite $ **Underwrite Variance %**= Difference between R2 Underwrite % minus R1 Underwrite % **Underwrite Variance $**= Difference between R2 Underwrite $ minus R1 Underwrite $
Lines	This section will contain the details around each line item that was modified/deleted/added during the review. If a note was added, it will be displayed along with the selected reason code. Both the R1 reasons and comments and the R2 reasons and comments are included here. **R1 Diff**= R1 Amount minus Original **R2 Diff**= R2 Amount minus Original **Variance**= R2 Amount minus R1 Amount
Estimate Review Totals	Breaks out the totals for the review.
Total Additions	This is the total under estimated amount.
Total Subtractions	This is the total over estimated amount.
Actual Difference	This is the Total Subtractions minus the Total Additions.
Absolute Difference	This is the Total Subtractions plus the Total Additions.
Satisfactory Dollars*	This is the total cost of repair minus the Total Subtractions.
Base Estimate Dollars*	This is the total cost of repair plus the Total Additions.
Percent Satisfactory*	This is the Satisfactory Dollars divided by the Base Estimate Dollars.