

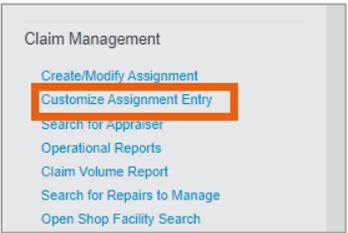
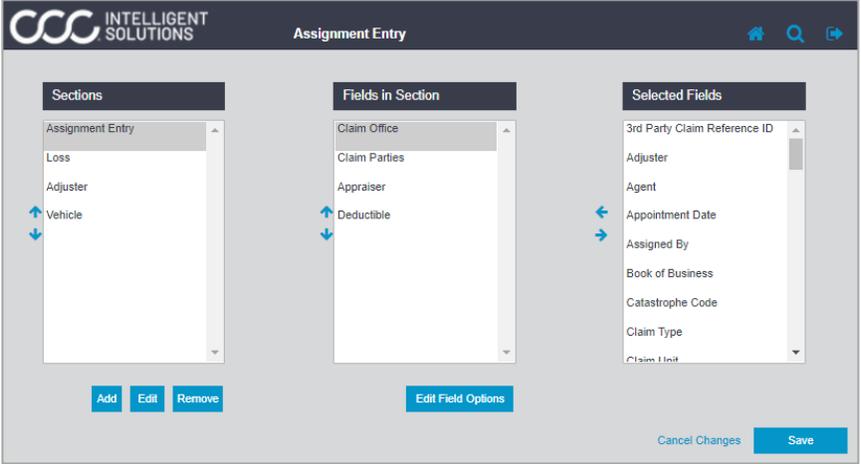
How to Use Customize Assignment Entry

Introduction

Customize Assignment Entry is the CCC ONE® Workflow – Claims Management feature that allows you to customize the fields that are available to Assignment Entry users in your office. You can use the Customize Assignment Entry screen to select the fields that will appear on the Customized Assignment Entry View. Please note that not all fields are customizable.

Note: This feature can be enabled at the Home Office, Regional, and/or Claim Office level based on your business requirements.

Customized Assignment Entry

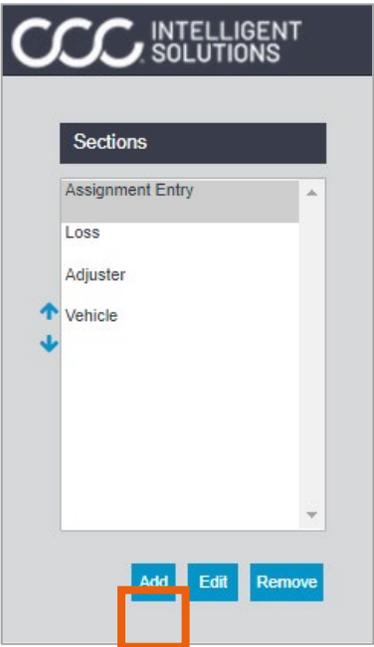
Step	Action
1	<p>From the CCC Portal Home Page, click the Customize Assignment Entry link.</p> 
2	<p>The Customize Assignment Entry screen is divided into three areas: Sections, Fields in Section, and Available Fields.</p>  <p>Note: The first time you access this screen the Sections and Fields in Section display boxes are blank.</p>

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How to Use Customize Assignment Entry, Continued

Create a Section

Step	Action
1	<p>Click the Add button located under the Sections box. The Add/Edit Section window appears.</p> 
2	<p>Use the text box to enter a Section Name. Note: The Section Name may not exceed 20 characters.</p>
3	<p>Click the Save button to save the new Section Label.</p> <p>Note: Once the Section Label is created and saved, you can add fields to that Section.</p> 

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Saving Changes to Customized Assignment Entry

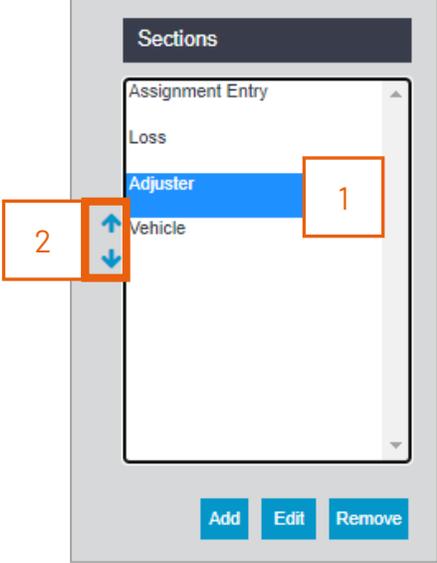
When adding a new Section, you will see two sets of Save and Cancel buttons. The Save and Cancel buttons located under the Section Name text box saves or cancels changes made to Section names only.

However, those buttons will not save or cancel those changes to the Customized Assignment Entry View permanently. This is true for all active windows that display additional Save or Save Changes buttons.

Click Save to retain additions or changes to the Customized Assignment Entry View, click Cancel to undo changes made.

Moving Sections

The order in which the Section Names appear in the Sections box is the order in which you create the Sections. The table below outlines the steps needed to change the Section order:

Step	Action
1	<p>In the Sections box, click the Section name you wish to move.</p> 
2	<p>Click the Up or Down arrow to move the selected Section.</p> <p>Note: When you move Sections, the selected fields and the order of those fields in the Sections do not change.</p>

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How to Use Customize Assignment Entry, Continued

Assignment Entry Fields

There are three (3) types of fields in Customize Assignment Entry. They are:

Field	Definition
Key Data	<p>In the Sections box, click the Section name you wish to move.</p> <p>Fields are Insurance Company and Claim Reference ID.</p>
Assignment Entry Required Fields	<p>The CCC ONE® Workflow – Claim Management application requires certain fields to be included in addition to the Key Data Fields.</p> <p>In order to save your Customized Assignment Entry selections, these fields must be included in your customized list:</p> <ul style="list-style-type: none"> • Claim Office • Claim Parties <ul style="list-style-type: none"> ○ Role ○ Company Name ○ Last Name ○ Individual / Company • Appraiser <ul style="list-style-type: none"> ○ Appraiser Type ○ Appraiser Name
User Customizable Fields	<p>The remaining list of fields can be added to the Customized Assignment Entry View as needed. Based on your business needs, you determine whether they are required or optional based.</p> <p>Note: For some of the fields, there are sub-fields. For each sub-field, you can:</p> <ul style="list-style-type: none"> • Require the field. • Make it optional but viewable in the Customized Assignment Entry View. • Make the sub-field hidden from the Customized Assignment Entry View. <p>A complete list of fields and sub-fields can be found at the end of this job aid.</p>

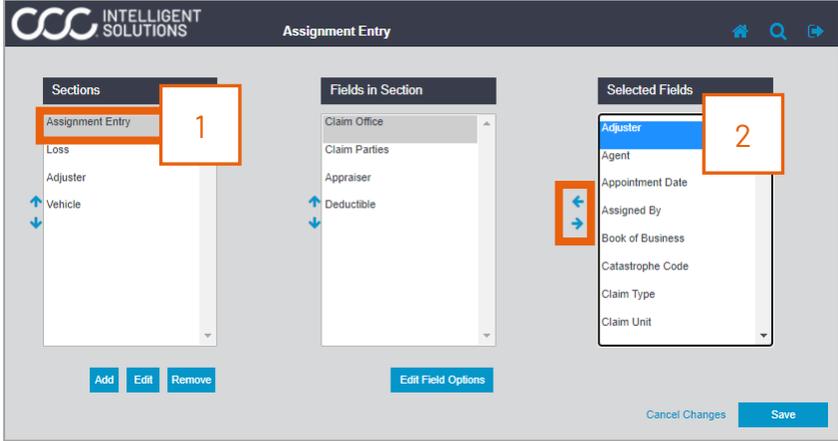
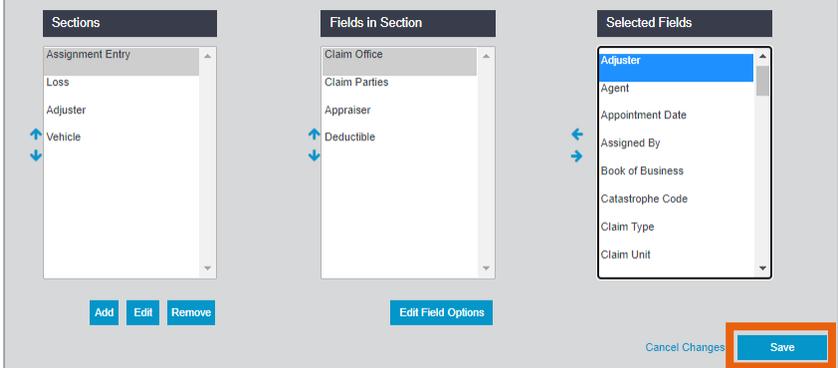
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Adding a field to a section

The following table outlines the steps necessary to add a field to a section:

Step	Action
1	<p>Click the Section Name you wish to add a field.</p> 
2	<p>Choose a field from the Selected Fields and click the left directional arrow to move the selected field to the Fields in Section box.</p> <p>Note: To remove a field, select one from the Fields in Section box and use the right directional arrow to move it to the Selected Fields box.</p>
3	<p>Repeat steps 1 - 2 until all of the desired fields have been added.</p>
4	<p>Click the Save button.</p>  <p>Note: You will not be able to save the changes until all of the system required fields are included.</p>

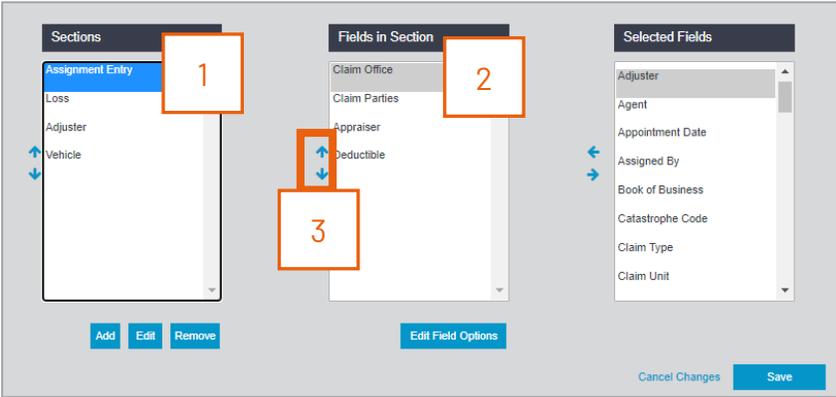
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Moving Fields within a Section

The order in which the fields appear in the Fields in Section box is the order in which the fields will appear in the Customized Assignment Entry View. The table below outlines the steps needed to change the order of Fields within a Section:

Step	Action
1	<p>In the Sections box, click the Section name in which you wish to change the order of the fields.</p> 
2	In the Fields in Section box, click the field you wish to move.
3	Click the Up or Down arrow to move the selected Field.

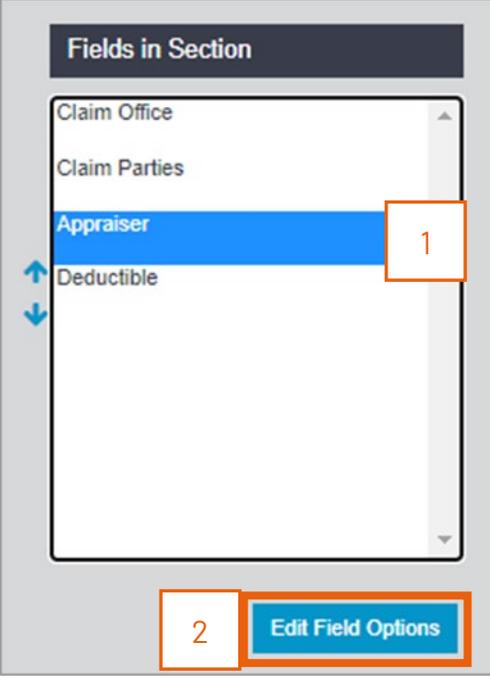
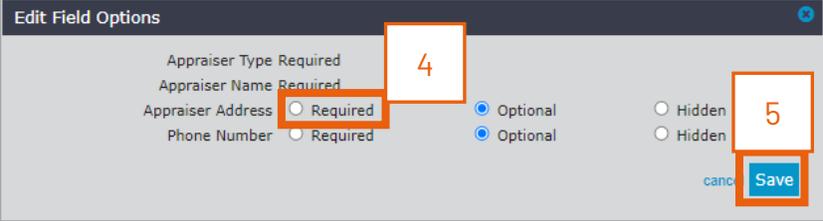
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Making Fields Required

Fields in the Customized Assignment Entry View are considered Optional unless you make them Required.

Note: This does not include those fields that are required by the application and automatically set to Required.

Step	Action	Action
1	Click the Field name in the Fields in Section box.	
2	Click the Edit Field Options button.	
3	The Field Parameter window displays.	
4	Click the Required radio button.	
5	Click the Save button.	<p>Note: You must click the Save button located at the bottom of the screen before exiting Customize Assignment Entry to permanently save your changes.</p>

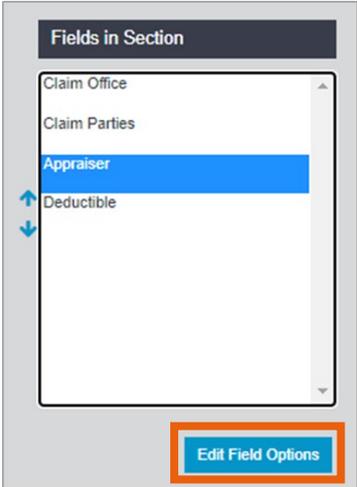
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Hiding Sub-Fields

Some fields have sub-fields associated with them. When you click the Edit button, all associated sub-fields are displayed. You can hide sub-fields from the customized view.

Note: You cannot change the order of the sub-fields. You can only hide them from the Customized Assignment Entry View. The following table outlines how to hide sub-fields:

Step	Action
1	<p>Click the Field name in the Fields in Section box and then click the Edit Field Options button.</p> 
2	<p>The Edit Field Options window appears. All sub-fields appear in the order they will be displayed in the customized view.</p> 
3	<p>Click the Hidden radio button to hide the sub-field on the Customized Assignment Entry View.</p>
4	<p>Click the Save button. Note: You must click the Save button located at the bottom of the screen before exiting Customize Assignment Entry to permanently save your changes.</p>

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Customizable Assignment Entry Fields

The following table lists the fields and subfields available within CCC ONE® Workflow – Claims Management. Those fields that are system required fields are indicated:

Field Name	Required	Sub-Field Name	Required
3 rd Party Claim Reference ID		3 rd Party Claim Reference ID	
Adjuster		Adjuster Last Name First Name Code Phone Number	
Agent		Last Name First Name ID License Agent Type Phone Number Address 1 Address 2 City State/Province Postal Code	
Appointment Date		Appointment Date Appointment Time	
Appraiser	X	Appraiser Type Appraiser Name Appraiser Address Phone Number	X X
Assigned By		Assigned By	
Catastrophe Code		Catastrophe Code	
Claim Office	X	Claim Office	X

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**Customizable
Assignment
Entry Fields,**
continued

Field Name	Required	Sub-field Name	Required
Claim Parties	X	Role	X
		Company Name	X
		Company Contact Last Name	
		Company Contact First Name	
		Company Contact Title	
		Last Name	
		First Name	
		Individual/Company	X
		Party Phone	
		Address Type	X
		Address 1	
		Address 2	
		City	
		State/Province	
		Postal Code	
		Email	
		Driver's License Number	
State/Province			
Expiration Date			
Social Security Number			
Claim Party Injured?			
Statement			
Claim Unit		Claim Unit	
Coverage Code		Coverage Code	
Daily Cost		Daily Cost	
Date Assigned		Date Assigned	
Date Reported		Date Reported	
Date of Loss		Date of Loss	
		Time of Loss	
Deductible		Deductible	
		Deductible Type	
Endorsement Notes		Endorsement Notes (notes field)	

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How to Use Customize Assignment Entry, Continued

Customizable Assignment Entry Fields, continued

Field Name	Required	Sub-field	Required
Facts of Loss		Facts of Loss (notes field)	
Impact Area(s) of Damage		Primary Impact Area Secondary Impact Area Tertiary Impact Area	
Injuries?		Injuries?	
Inspection Requirements		Inspection Requirements (notes field)	
Instructions to Estimator		Instructions to Estimator (notes field)	
Insurance Carrier		Insurance Carrier Enter Other	
Is The Vehicle Driveable?		Is The Vehicle Driveable?	
Loss Reference ID		Loss Reference ID	
OK to Pay?		OK to Pay?	
Place of Loss		Place of Loss Description Address 1 Address 2 City State/Province Postal Code	
Policy Dates		Policy Start Dates Policy Expiration Dates	
Policy Extension		Policy Extension	
Postal Code Where Vehicle Principally Garaged		Postal Code Where Vehicle Principally Garaged	
Rental Car in Use?		Rental Car in Use?	
Request for Supplement		Request for Supplement	
Theft?		Theft?	
Type of Loss		Type of Loss	
Underwriting Company		Underwriting Company	

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**Customizable
Assignment
Entry Fields,**
continued

Field Name	Required	Sub-field Name	Required
Vehicle		VIN Vehicle Type Year Make Model Body Style Vehicle Engine	
Vehicle Condition		Vehicle Condition	
Vehicle Exterior Color		Vehicle Exterior Color	
Vehicle Impact Notes		Vehicle Impact Notes (notes field)	
Vehicle Interior Color		Vehicle Interior Color	
Vehicle License Expiration Date		Vehicle License Expiration Date	
Vehicle License Plate Number		Vehicle License Plate Number	
Vehicle License State		Vehicle License State	
Vehicle Location		Vehicle Location Name Address 1 Address 2 City State/Province Postal Code Phone Number	
Vehicle Odometer		Vehicle Odometer	
Vehicle Prior Damage Notes		Vehicle Prior Damage Notes (notes field)	
Vehicle Production Date		Vehicle Production Date	
Vehicle is Total Loss?		Vehicle is Total Loss?	

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Version History

Version Number	Revision Date	Description
1.0	11/17/2021	Version History added.

