

Live Review

Introduction This job aid discusses how to perform a Live Review on claims flagged as Potential in the CCC Portal. Live Reviews are performed between a supervisor/manager and a reinspector/reviewer on an identified claim. After the review is complete a Live Review Report is generated.

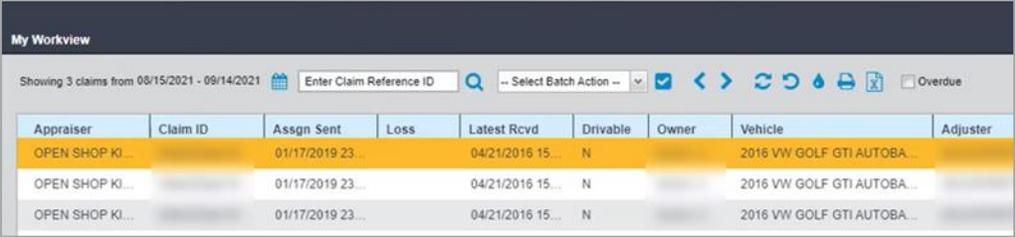
Step 1 - Access

Follow the steps in the table below to access Live Review from a claim folder:

| Step | Action |
|------|--|
| 1 | Open a Claim Folder . |
| 2 | Select Live Review under the Desk Review section. The Estimate Review page opens in the Combined View tab. <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;">  </div> |
| 3 | Proceed to Step 2 - Confirm Live Review on page 2. |

OR

Follow the steps in the table below to access Live Review from a Worklist:

| Step | Action |
|------|---|
| 1 | Select a number from the Total column for the Live Review - Confirmed or Live - Review Potential . The My Workview opens. <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;">  </div> |
| 2 | Select a worklist from the list of available options. The claim file opens below. <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;">  </div> |

Continued on next page



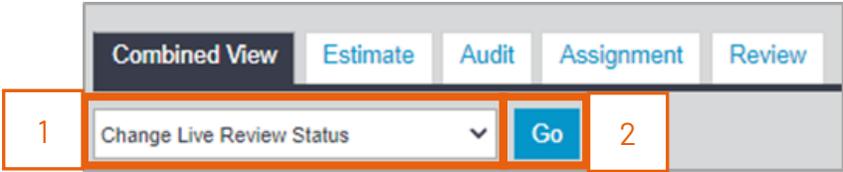
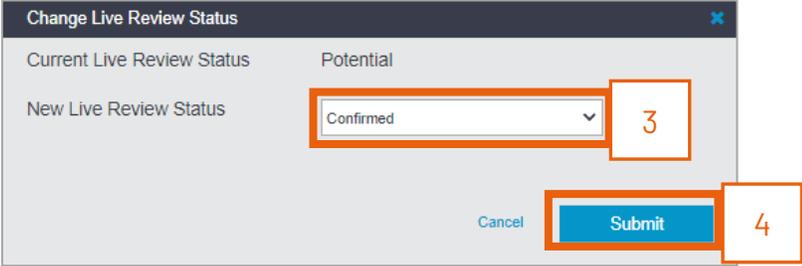
Live Review, Continued

Step 1 – Access, continued

| Step | Action |
|------|---|
| 3 | Select Live Review under the Desk Review section. The Estimate Review page opens in the Combined View tab.  |
| 4 | If the Live Review – Confirmed worklist was selected skip to Step 3 – Complete Live Review on page 3. OR If the Live – Review Potential worklist was selected proceed to Step 2 –Confirm Live Review below. |

Step 2 –Confirm Live Review

Follow the steps in the table below to change the live review status to Confirmed:

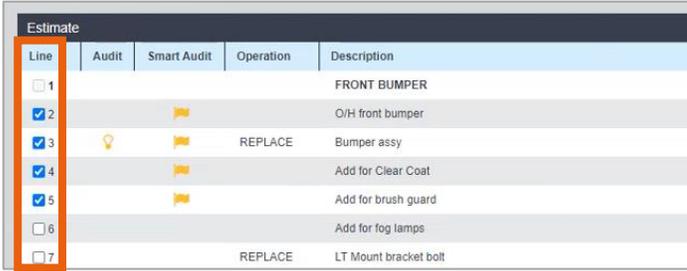
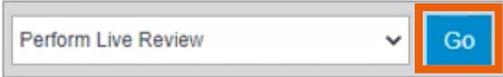
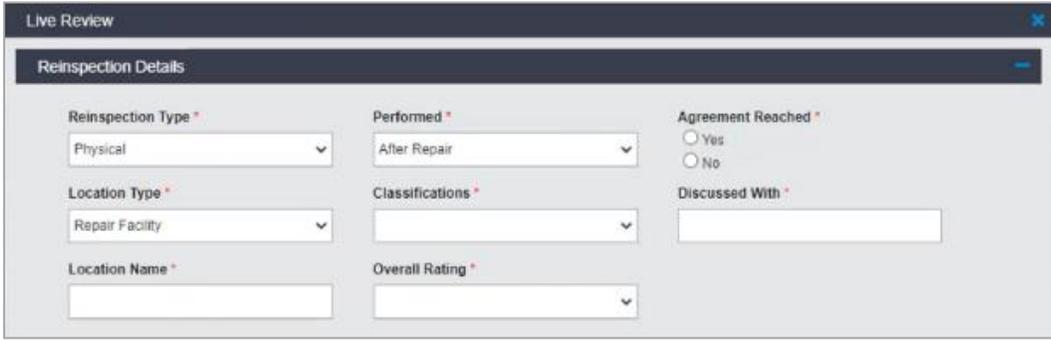
| Step | Action |
|------|---|
| 1 | Select Change Live Review Status from the dropdown. |
| 2 | Click Go . The Change Live Review Status dialog box opens.  |
| 3 | Select Confirmed from the New Live Review Status dropdown. Note: The Current Live Review Status displays. |
| 4 | Click Submit . A confirmation message appears click OK . The Current Live Review Status changes to Perform Live Review.  <p>Note: Once confirmed the assigned reinspector/reviewer on the claim will receive an email informing them the supervisor has requested to conduct a live review. Reviews on the requested claim shouldn't be conducted till contact is made with the supervisor requesting the live review.</p> |

Live Review, Continued

Step 3 - Complete Live Review

Follow the steps in the table below to complete the live review:

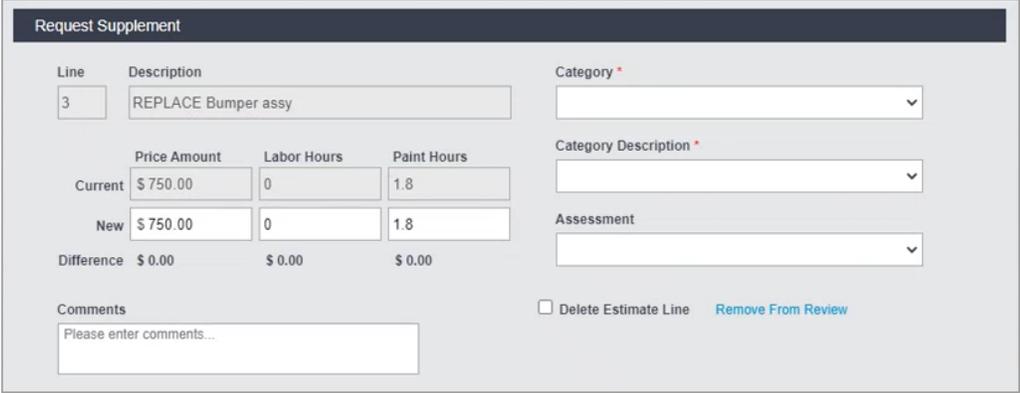
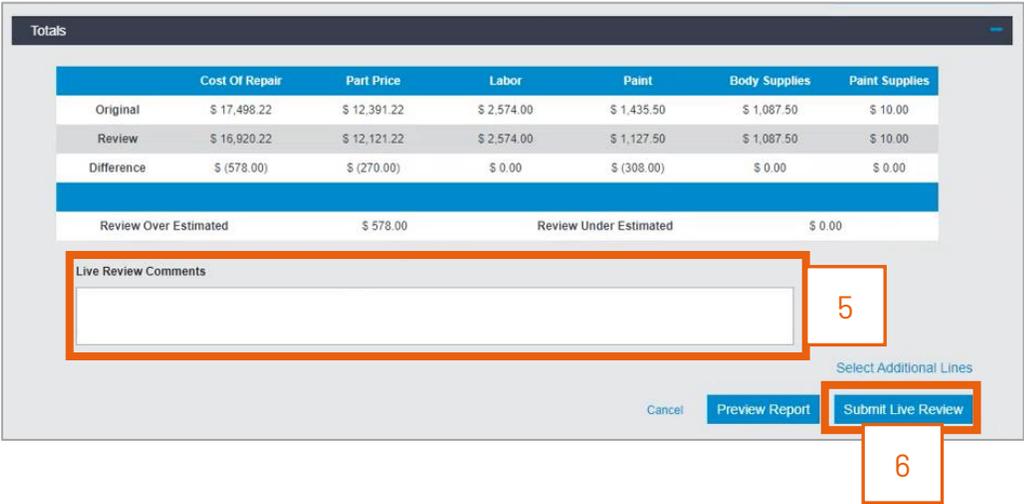
Note: Perform these steps once a review has been scheduled with the reinspector using a screensharing program to discuss the changes.

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---------------------------------------|--|-------------|-----------|-----------------------|-----------|-------------|----------------------------|--|--|--|--------------|---------------------------------------|--|--|--|------------------|---------------------------------------|--|--|---------|-------------|---------------------------------------|--|--|--|--------------------|---------------------------------------|--|--|--|---------------------|----------------------------|--|--|--|-------------------|----------------------------|--|--|---------|-----------------------|
| 1 | <p>Select the checkboxes for the estimate line items you want to include in the review.</p>  <table border="1" data-bbox="678 554 1365 825"> <thead> <tr> <th>Line</th> <th>Audit</th> <th>Smart Audit</th> <th>Operation</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> 1</td> <td></td> <td></td> <td></td> <td>FRONT BUMPER</td> </tr> <tr> <td><input checked="" type="checkbox"/> 2</td> <td></td> <td></td> <td></td> <td>O/H front bumper</td> </tr> <tr> <td><input checked="" type="checkbox"/> 3</td> <td></td> <td></td> <td>REPLACE</td> <td>Bumper assy</td> </tr> <tr> <td><input checked="" type="checkbox"/> 4</td> <td></td> <td></td> <td></td> <td>Add for Clear Coat</td> </tr> <tr> <td><input checked="" type="checkbox"/> 5</td> <td></td> <td></td> <td></td> <td>Add for brush guard</td> </tr> <tr> <td><input type="checkbox"/> 6</td> <td></td> <td></td> <td></td> <td>Add for fog lamps</td> </tr> <tr> <td><input type="checkbox"/> 7</td> <td></td> <td></td> <td>REPLACE</td> <td>LT Mount bracket bolt</td> </tr> </tbody> </table> | 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 | <input type="checkbox"/> 7 | | | REPLACE | LT Mount bracket bolt |
| 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 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> 7 | | | REPLACE | LT Mount bracket bolt | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 | <p>Click Go. The Live Review dialog box opens.</p>  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3 | <p>Select the appropriate option from the required Reinspection Details fields based on how the review is being conducted:</p> <ul style="list-style-type: none"> • Reinspection Type • Location Type • Location Name • Preform • Classification • Overall Rating • Agreement Reached • Discussed with  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Continued on next page

Live Review, Continued

Step 3 - Complete Live Review, continued

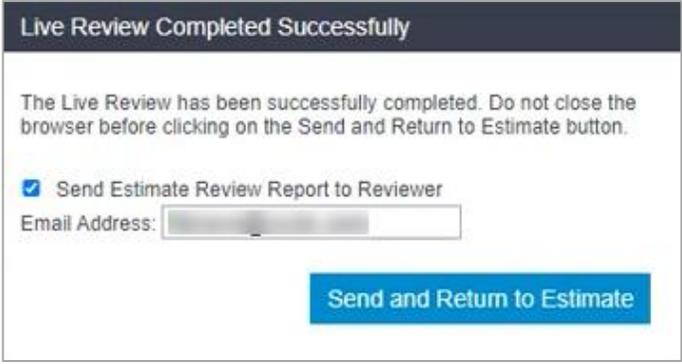
| Step | Action |
|------|---|
| 4 | <p>Select the appropriate required Supplement Request fields for each line item:</p> <ul style="list-style-type: none"> • Category • Category Description <p>Make any necessary changes by entering a new Price, Labor Hours, and Paint Hours. Additionally, you can select an Assessment option, enter a Comment for the estimate lines, delete estimate line, and remove line from the review.</p>  |
| 5 | Review the Total section and enter an optional Live Review Comments . |
| 6 | <p>Click Submit Live Review. The Live Review Completed Successfully dialog box opens.</p>  <p>Note: If desired select Preview Report to review a PDF of the Live Review Report before submitting the review. Click Select Additional Lines to return to the combined view page to select additional estimate lines to include in the review.</p> |

Continued on next page



Live Review, Continued

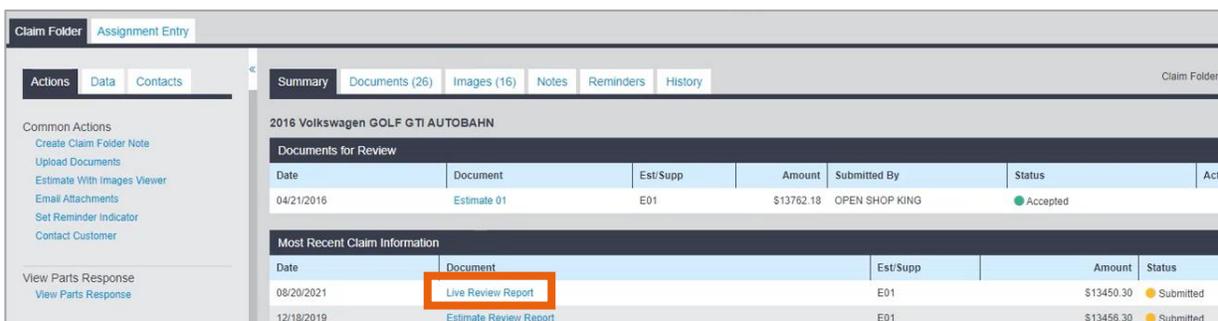
Step 3 - Complete Live Review, continued

| Step | Action |
|------|--|
| 7 | <p>To send the estimate to the reviewer:</p> <p>Select the Send Estimate Review Report to Reviewer checkbox and enter the Reviewer's Email Address then click the Send and Return to Estimate button.</p> <p>To simply return to the estimate:</p> <p>Deselect the Send Estimate Review Report to Reviewer checkbox and click the Return to Estimate button.</p>  |

Live Review Report

Close the Estimate Review browser window. Return to and Refresh the Claim Folder to view the **Live Review Report** PDF.

The Live Review Report shows the Review Details, Live Review Notes, Reinspection Metrics, Totals By Category/ Description, and Current/New/Difference.



| 2016 Volkswagen GOLF GTI AUTOBAHN | | | | | | | |
|-----------------------------------|------------------------|----------|------------|----------------|----------|-----|--|
| Documents for Review | | | | | | | |
| Date | Document | Est/Supp | Amount | Submitted By | Status | Act | |
| 04/21/2016 | Estimate 01 | E01 | \$13762.18 | OPEN SHOP KING | Accepted | | |
| Most Recent Claim Information | | | | | | | |
| Date | Document | Est/Supp | Amount | Status | | | |
| 08/20/2021 | Live Review Report | E01 | \$13450.30 | Submitted | | | |
| 12/18/2019 | Estimate Review Report | E01 | \$13456.30 | Submitted | | | |

The Live Review Report PDF can also be found on the **Documents tab** or the **History tab** to view the Live Review related progress.