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 preformed 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.	Desk Review Estimate Review File Review Live Review Estimate Review Reinspection
3	Proceed to Step 2 - Confirm Live Review on page 2.	

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.						
	My Work						
	My Work My T	eam's Work		14			
	Worklist Name		Total	Overdue			
	Live Review - Confirmed			1	0		
	Live Review - Po	tential		0	0		
2	Select a workl	ist from the list	t of available op	tions. The o	claim file opens bel	ow.	
	My Workview Showing 3 claims from 08/15/2	021 - 09/14/2021 🏦 Enter Clair	n Reference ID	Batch Action 💌 🔽		Iverdue	
	OPEN SHOP KI	01/17/2019 23.	04/21/2016 15	i N	2016 VW GOLF GTI AUTOBA	Adjuster	
	OPEN SHOP KI	01/17/2019 23.		i N	2016 VW GOLF GTI AUTOBA	-	
	OPEN SHOP KI	01/17/2019 23.	. 04/21/2016 15	i N	2016 VW GOLF GTI AUTOBA	-	

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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.							
	Combined View Estimate Audit Assignment Review							
	1 Change Live Review Status 🗸 Go 2							
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.							
	Change Live Review Status							
	Current Live Review Status Potential							
	New Live Review Status							
	Cancel Submit 4							
	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.							



Step 3 - Complete Live Review

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

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

Step		Action				
1	Select the checkboxes for the estimate line items you want to include in the review.	Estimate Audit Smart Audit Operation Description Image: Ima				
2	Click Go . The Live Review di opens.	alog box Perform Live Review	Go			
3	Select the appropriate option from the required Reinspection Details fields based on how the review is being conducted: • Reinspection Type • Preform • Agreement Reached • Location Type • Classification • Discussed with • Location Name • Overall Rating					
	Reinspection Details		-			
	Reinspection Type * Physical Location Type * Repair Facility Location Name *	Performed * Agreement Reached * After Repair Classifications * Discussed With * Overall Rating *				

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Step 3 - Com	plete Live Review,	continued
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Step	Action								
4	Select the appropriate required Supplement Request fields for each line item:								
	Category Category Description								
	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.								
	Request Supplement								
	Line Description Category *								
	3 REPLACE Bumper assy								
	Category Description *								
	Current \$ 750.00 0 1.8								
	New S750.00 0 18 Assessment								
	Difference \$ 0.00 \$ 0.00 \$ 0.00								
	Please enter comments								
5	Review the Total section and enter an optional Live Review Comments .								
6	Click Submit Live Review. The Live Review Completed Successfully dialog box								
	opens.								
	Totals								
	Cost Of Repair Part Price Labor Paint Body Supplies Paint Supplies								
	Review \$ 16,920.22 \$ 12,391.22 \$ 2,574.00 \$ 1,435.50 \$ 1,007.50 \$ 10.00 Review \$ 16,920.22 \$ 12,121.22 \$ 2,574.00 \$ 1,127.50 \$ 1,087.50 \$ 10.00								
	Difference \$ (578.00) \$ (270.00) \$ 0.00 \$ (308.00) \$ 0.00 \$ 0.00								
	Review Over Estimated \$ 578.00 Review Under Estimated \$ 0.00								
	Live Review Comments								
	5								
	Select Additional Lines								
	Cancel Preview Report Submit Live Review								
	6								
	Note: If desired select Proview Pepert to review a PDE of the Live Peview Pepert								
	hefore submitting the review. Click Select Additional Lines to return to the								
	combined view page to select additional estimate lines to include in the review								
	T combined view page to select additional estimate lines to include in the review.								

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Step 5 - Complete Live Review, continue	Ste	p3-	Comp	lete	Live	Review ,	continue
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Step		Action
7	To send the estimate to the reviewer:	
	Select the Send Estimate Review Report to Reviewer	Live Review Completed Successfully
	checkbox and enter the Reviewer's Email Address then click the Send and Return to Estimate button.	The Live Review has been successfully completed. Do not close the browser before clicking on the Send and Return to Estimate button.
	To simply return to the estimate:	Email Address:
	Deselect the Send Estimate Review Report to Reviewer checkbox and click the Return to Estimate button.	Send and Return to Estimate

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.

Claim Folder Assignment Entry									
Actions Data Contacts	« Summary Docum	ents (26) Images (16) Notes	Reminders History			Claim Folder			
Common Actions	2016 Volkswagen GO	LF GTI AUTOBAHN							
Create Claim Folder Note	Documents for Revie	w							
Estimate With Images Viewer	Date	Document	Est/Supp	Amount Submitted By	Status	Act			
Email Attachments	04/21/2016	Estimate 01	E01	\$13762.18 OPEN SHOP KING	 Accepted 				
Set Reminder Indicator									
Contact Customer	Most Recent Claim In	nformation			NT	(r			
View Parts Response	Date	Document		Est/Supp	Amount	Status			
View Parts Response	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.

