

# CCC ONE® Update Plus Repair Status/CSI v1.5 Management Reporting

## Overview

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**Introduction** CCC ONE® Update Plus Repair Status/CSI v1.5 Management Reporting provides you a view of how your Direct Repair Program Shops are performing over a period of time with respect to customer satisfaction surveys. You can see CSI scores and feedback as well as trends that are appearing for certain key metrics.

Management Reporting consists of the following Reports:

- Update Plus CSI Summary Report
- Update Plus CSI Survey Completion Report
- CSI Trend Report

This document provides details on how to access Update Plus Management Reports from Update Plus Repair Status/CSI on the CCC Portal. Management Reporting uses CCC ONE® Claim Insight.



If you already have access to Claim Insight, these Reports will display in the UpdatePlus Folder.

For more information on Update Plus and how it works, please see the document entitled "Update Plus Repair Status/CSI".

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## Access Update Plus Management Reporting on CCC Portal

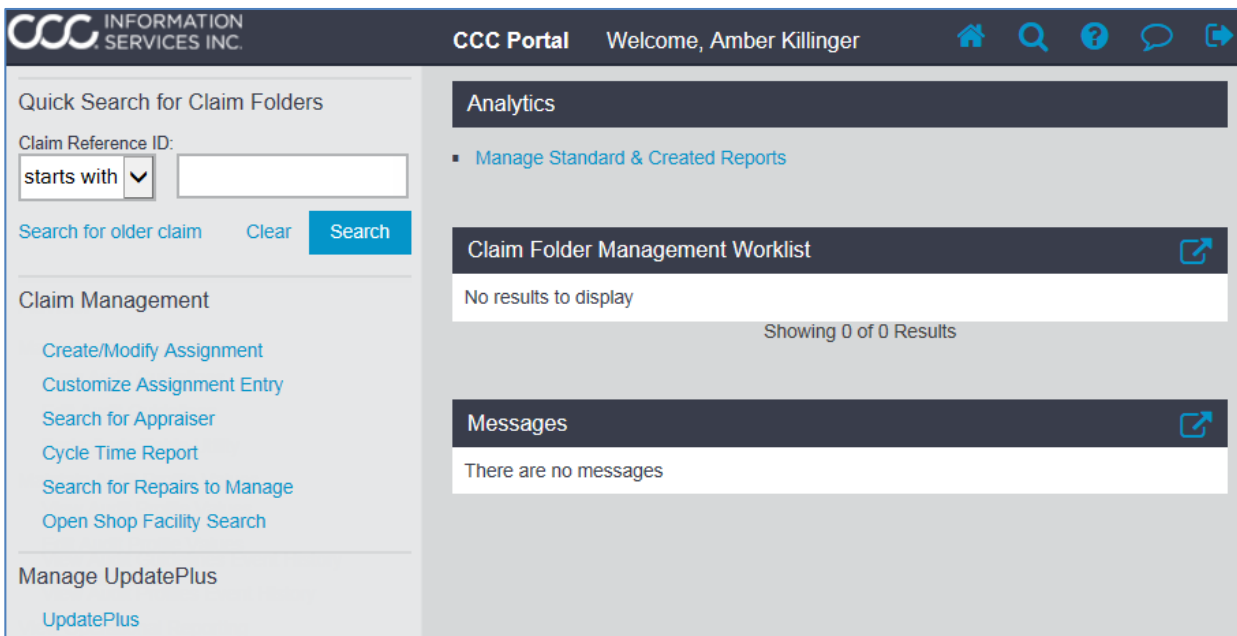
**Introduction** This section of the document provides the steps for how to login to CCC Portal and access CCC ONE® UpdatePlus Management Reporting.

**Login** Use the following steps to log into CCC Portal:

Step	Action
1	Open a browser window and go to <b>https://mycccportal.com</b>
2	Log into CCC Portal with your <b>Username</b> and <b>Password</b> .


Your CCC Portal Home Page will display.



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## Access Update Plus Management Reporting on CCC Portal, Continued

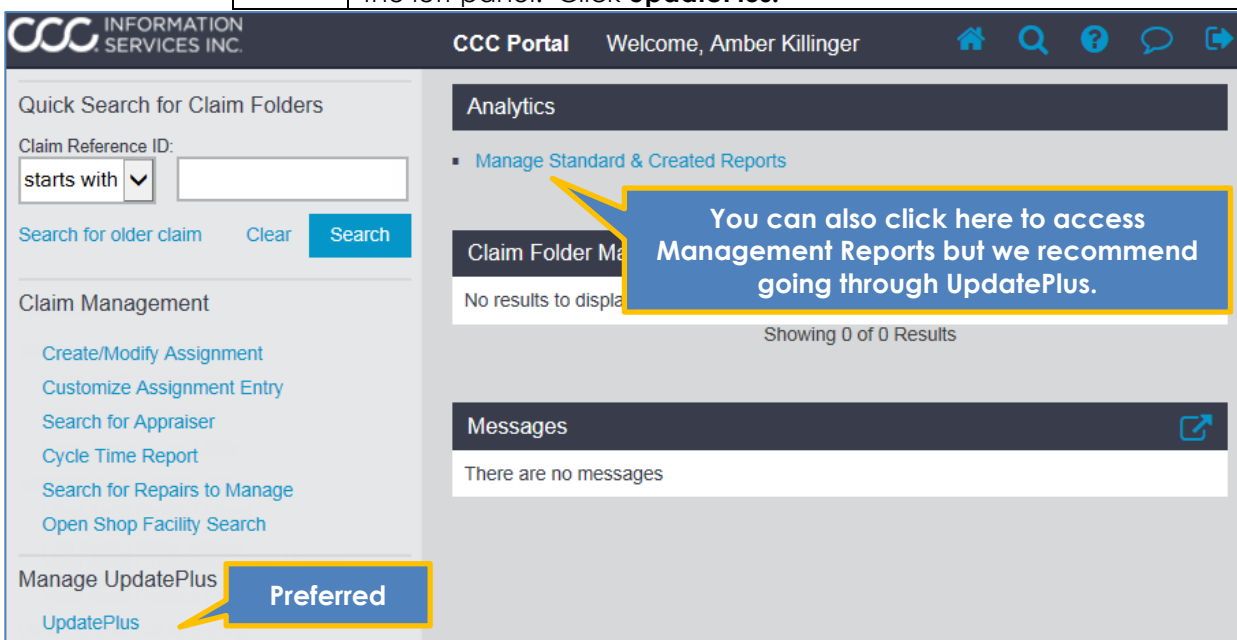
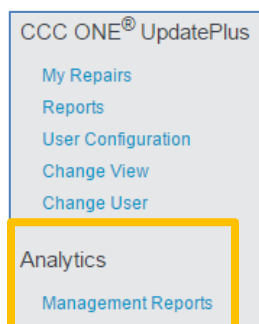
### Accessing Management Reporting

Once logged into CCC Portal, there are two ways to get to Update Plus Management Reporting. You can:

- Go to **Manage** and click on **UpdatePlus** OR
- Go to the **Analytics Worklist** and click the **Manage Standard & Created Reports** link.

**TRAINING NOTE:** We will demonstrate and recommend the first method: navigating to Update Plus.

Step	Action
1	Scroll down the <b>Home Page</b> until you see <b>Manage UpdatePlus</b> on the left panel. Click <b>UpdatePlus</b> .

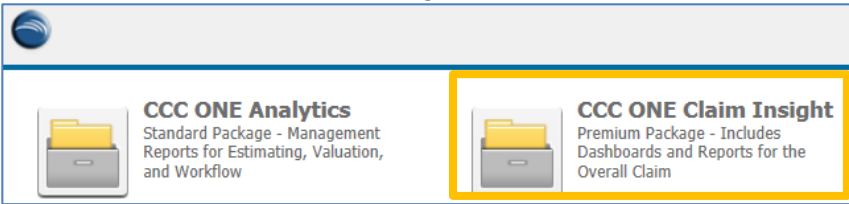

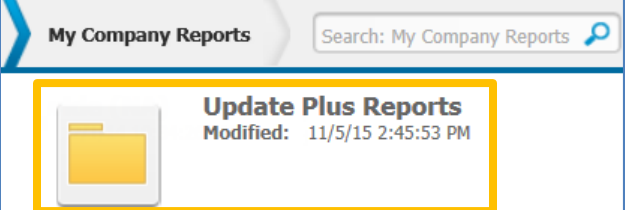
The UpdatePlus Home Page displays. Go to the left side panel and click on **Management Reports**.

You will be taken to CCC ONE® Analytics, where all of your Management Reports are available.




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## Access Update Plus Management Reporting on CCC Portal, Continued

### Accessing Management Reporting, continued

Step	Action
2	<p>Click on the <b>CCC ONE Claim Insight</b> folder.</p> 
3	<p>Click on <b>My Company Reports</b>.</p> 
4	<p>Locate and click on <b>Update Plus Reports</b>.</p> 

All of the Update Plus Management Reports display. The following sections will describe each Report in detail.

Update Plus Reports	Search: Update Plus Reports
 <p><b>CSI Summary Report</b> Modified: 11/5/15 2:43:00 PM</p>	 <p><b>CSI Survey Completion Report</b> Modified: 11/5/15 2:54:02 PM</p>
 <p><b>CSI Trend Report</b> Modified: 11/6/15 3:19:28 PM</p>	

## Update Plus CSI Summary Report

### Report Description

The Update Plus CSI Summary Report is an average of the CSI score over a specified Date Range. It provides an overview of Shop performance over a period of time on some important metrics such as cleanliness, service, claim handling etc. It also shows what percentage of responses are being received back for the surveys sent. This is a good report to identify areas in which Shop performance can improve and also to compare the performance of these shops in relation to other shops.

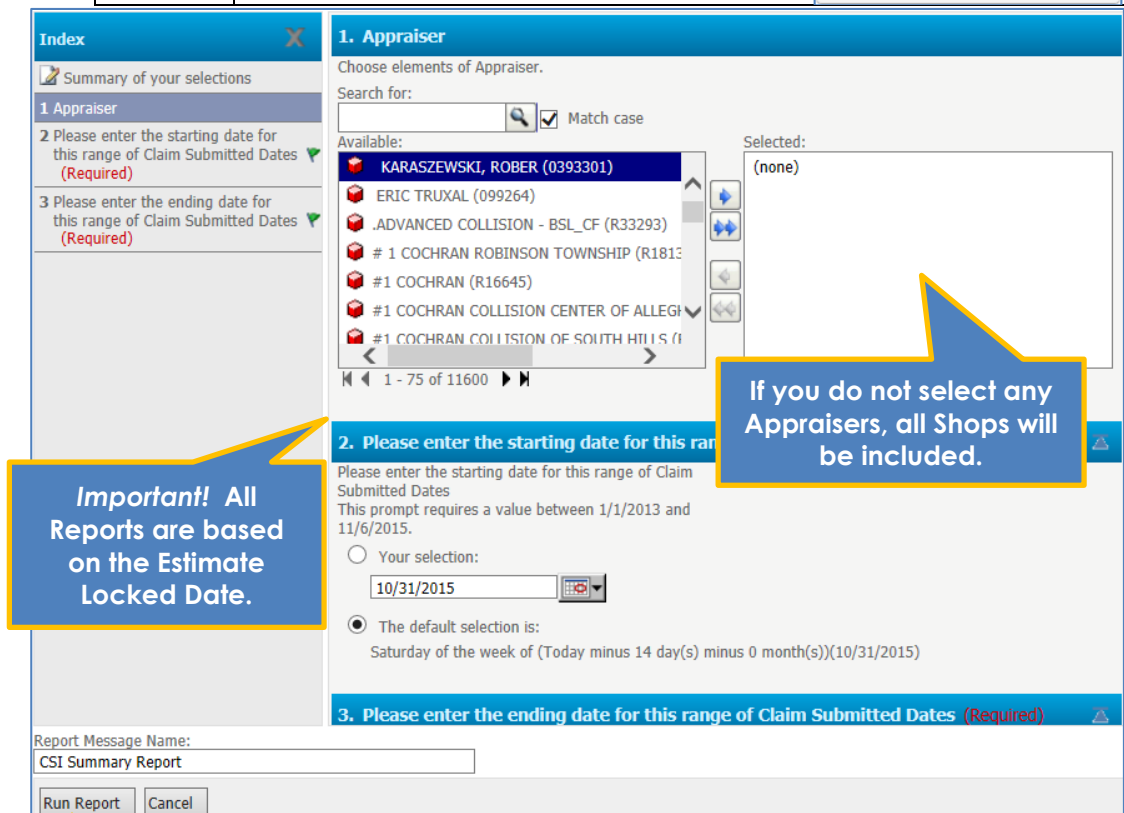


For more information on the Metrics, please see the Update Plus Glossary which is the last Job Aid in this document.

### Procedure

Use the following steps to run a CSI Summary Report:

Step	Action
1	In the Update Plus Folder, click on <b>CSI Summary Report</b> .



The screenshot shows the 'CSI Summary Report' application window. On the left is an 'Index' pane with a tree view containing 'Summary of your selections', '1 Appraiser', '2 Please enter the starting date for this range of Claim Submitted Dates (Required)', and '3 Please enter the ending date for this range of Claim Submitted Dates (Required)'. The main area is titled '1. Appraiser' and contains a search bar, a list of available appraisers (including KARASZEWSKI, ROBER and ERIC TRUXAL), and a 'Selected' list which is currently empty. Below this is section '2. Please enter the starting date for this range of Claim Submitted Dates' with a date picker set to 10/31/2015. At the bottom is section '3. Please enter the ending date for this range of Claim Submitted Dates (Required)'. A 'Run Report' button is at the bottom left. A yellow arrow points to the 'Run Report' button from the procedure table below.

**Important! All Reports are based on the Estimate Locked Date.**

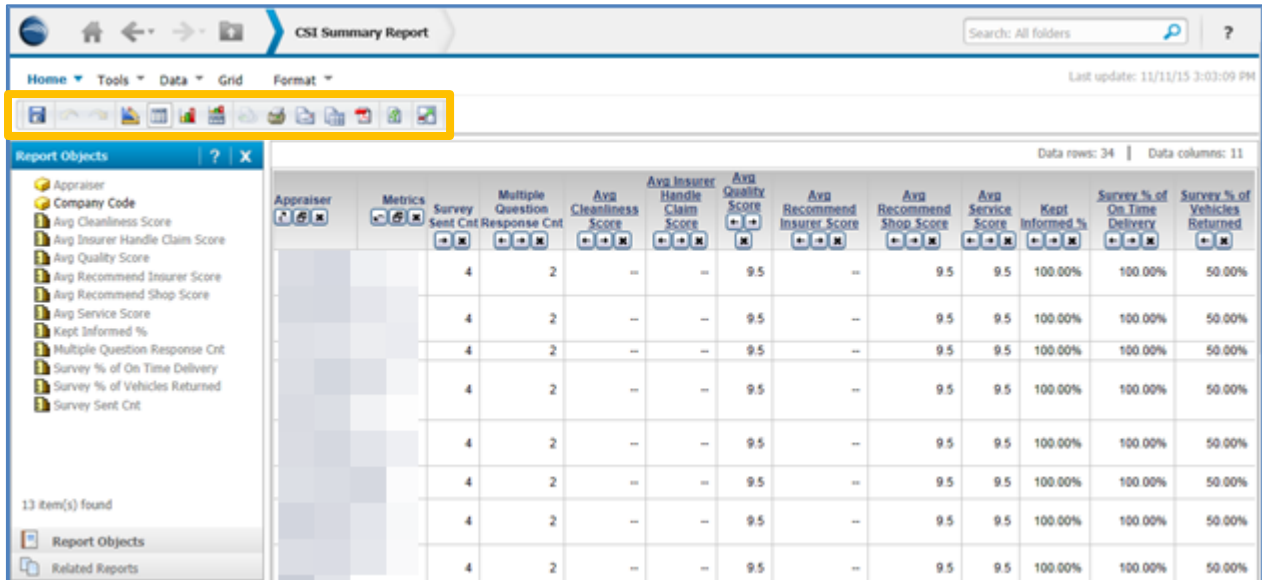
**If you do not select any Appraisers, all Shops will be included.**

2	Select <b>Appraisers</b> (Body Shops) to include.
3	Select <b>Date Range</b> for Claim Submitted Dates.
4	Click <b>Run Report</b> .

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## Update Plus CSI Summary Report, Continued

**CSI Summary Report Results** The system processes and your CSI Summary Report displays. For each Shop, the average Score of each of the CSI Survey Questions is shown.



Appraiser	Survey Sent Cnt	Multiple Question Response Cnt	Avg Cleanliness Score	Avg Insurer Handle Claim Score	Avg Quality Score	Avg Recommend Insurer Score	Avg Recommend Shop Score	Avg Service Score	Kept Informed %	Survey % of On Time Delivery	Survey % of Vehicles Returned
	4	2	--	--	9.5	--	9.5	9.5	100.00%	100.00%	50.00%
	4	2	--	--	9.5	--	9.5	9.5	100.00%	100.00%	50.00%
	4	2	--	--	9.5	--	9.5	9.5	100.00%	100.00%	50.00%
	4	2	--	--	9.5	--	9.5	9.5	100.00%	100.00%	50.00%
	4	2	--	--	9.5	--	9.5	9.5	100.00%	100.00%	50.00%
	4	2	--	--	9.5	--	9.5	9.5	100.00%	100.00%	50.00%
	4	2	--	--	9.5	--	9.5	9.5	100.00%	100.00%	50.00%
	4	2	--	--	9.5	--	9.5	9.5	100.00%	100.00%	50.00%

From here, you can export the Report to Excel or as a PDF, email it, or save it.



You can also set up a Subscription to run and email this Report automatically.



See the next to last section of this document for how to setup a Subscription to automatically run and send this Report.

## Update Plus CSI Survey Completion Report

### Report Description

The Update Plus CSI Survey Completion Report helps to identify the Survey response percentage for each of your Shops. It also provides the number of Survey responses completed Year to Date. This can be used to drive the response rate up with each individual Shop.

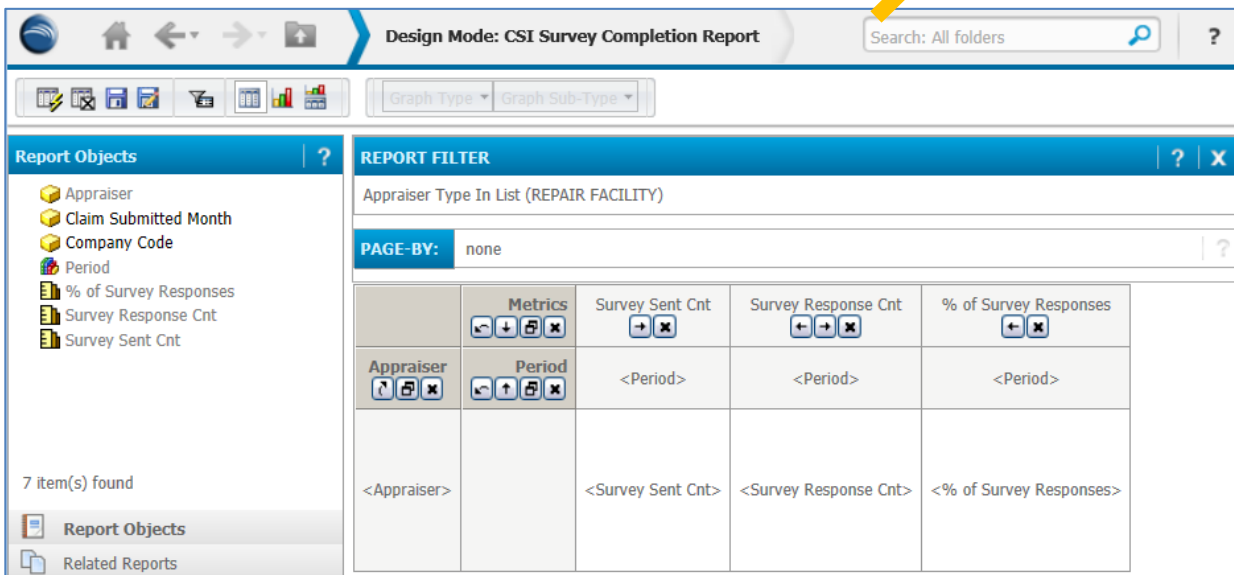


For more information on the Metrics, please see the Update Plus Glossary which is the last Job Aid in this document.

### Procedure

The CSI Summary Report runs automatically because it already has a defined set of parameters. If you want to see those parameters, use the following step:

Step	Action
1	In the Update Plus Folder, click on <b>Edit</b> on the <b>CSI Survey Completion Report</b> button.



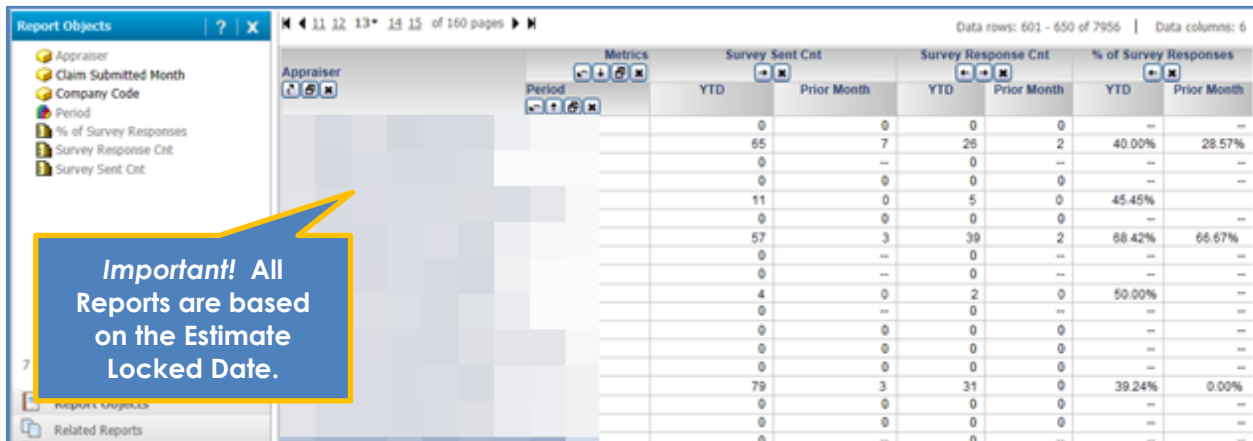

It is highly recommended that you not change the parameters for this Management Report.

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## Update Plus CSI Survey Completion Report, Continued

### CSI Survey Completion Report Results

The system processes and your CSI Survey Completion Report displays. For each Shop, the YTD and Prior Month Survey counts display with the percentages of Responses sent back by Customers on the Surveys.



Appraiser	Period	Survey Sent Cnt		Survey Response Cnt		% of Survey Responses	
		YTD	Prior Month	YTD	Prior Month	YTD	Prior Month
		0	0	0	0	--	--
		65	7	26	2	40.00%	28.57%
		0	--	0	--	--	--
		0	0	0	0	--	--
		11	0	5	0	45.45%	--
		0	0	0	0	--	--
		57	3	39	2	68.42%	66.67%
		0	--	0	--	--	--
		0	--	0	--	--	--
		4	0	2	0	50.00%	--
		0	--	0	--	--	--
		0	0	0	0	--	--
		0	0	0	0	--	--
		0	0	0	0	--	--
		79	3	31	0	39.24%	0.00%
		0	0	0	0	--	--
		0	0	0	0	--	--
		0	--	0	--	--	--

From here, you can export the Report to Excel or as a PDF, email it, or save it.



You can also set up a Subscription to run and email this Report automatically.



See the next to last section of this document for how to setup a Subscription to automatically run and send this Report.



## Update Plus CSI Trend Report

### Report Description

The Update Plus CSI Trend Report provides the Year over Year trend of Survey metrics for the selected Shop. For example, at Shop A, what is the Cleanliness rating? Is it going up or down? This helps identify the overall trends and areas of improvement that can be targeted for the selected Shop.

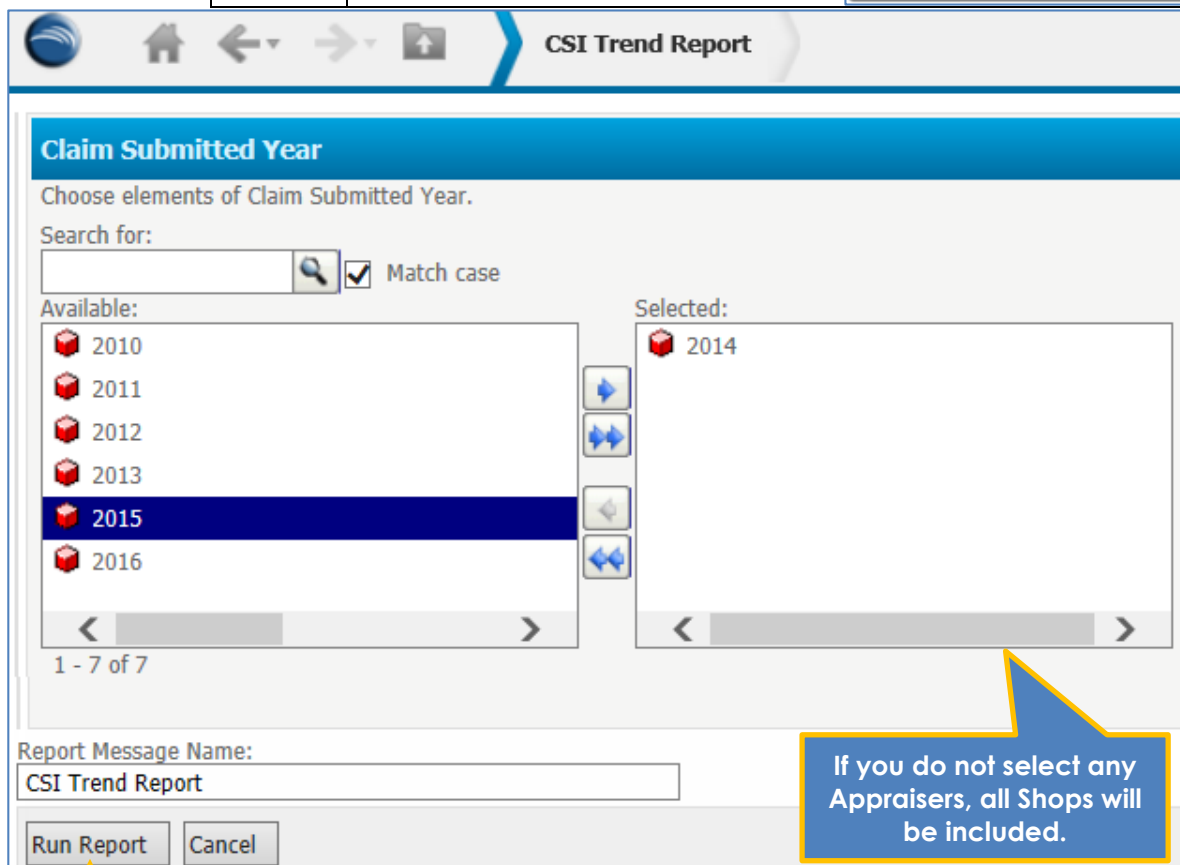


For more information on the Metrics, please see the Update Plus Glossary which is the last Job Aid in this document.

### Procedure

Use the following steps to run a CSI Trend Report:

Step	Action
1	In the Update Plus Folder, click on <b>CSI Trend Report</b> .



The screenshot shows the 'CSI Trend Report' window. At the top, there's a title bar with navigation icons and the text 'CSI Trend Report'. Below this is a section titled 'Claim Submitted Year' with the instruction 'Choose elements of Claim Submitted Year.' There's a search bar with a magnifying glass icon and a 'Match case' checkbox. Below the search bar are two lists: 'Available:' and 'Selected:'. The 'Available:' list contains years from 2010 to 2016, with 2015 highlighted. The 'Selected:' list contains the year 2014. Between the lists are four arrow buttons for moving items. At the bottom of the 'Available:' list is a scroll bar and the text '1 - 7 of 7'. Below the lists is a 'Report Message Name:' field containing 'CSI Trend Report'. At the bottom are 'Run Report' and 'Cancel' buttons. A yellow arrow points to the 'Run Report' button. A blue callout box with a yellow border points to the 'Run Report' button and contains the text: 'If you do not select any Appraisers, all Shops will be included.'

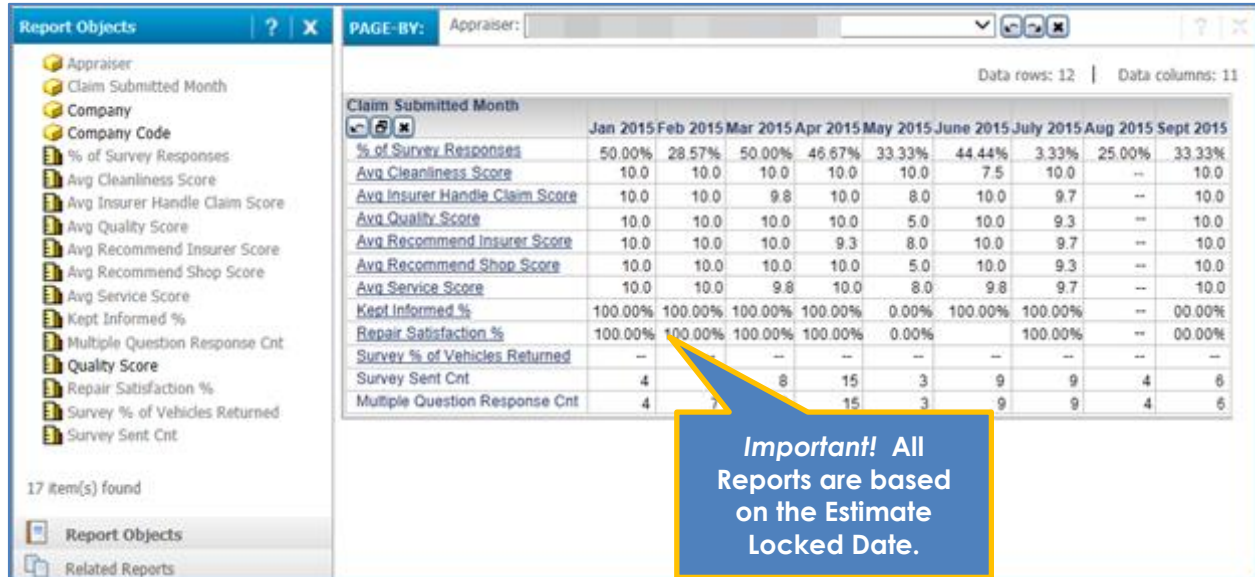
2	Select <b>Years</b> to include in the Report.
3	Click <b>Run Report</b> .

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## Update Plus CSI Trend Report, Continued

### CSI Trend Report Results

The system processes and your CSI Trend Report displays with the selected Year over Year metric trends for the selected Shops.



**Report Objects** | ? | X | PAGE-BY: Appraiser: [dropdown] | Data rows: 12 | Data columns: 11

Claim Submitted Month	Jan 2015	Feb 2015	Mar 2015	Apr 2015	May 2015	June 2015	July 2015	Aug 2015	Sept 2015
% of Survey Responses	50.00%	28.57%	50.00%	46.67%	33.33%	44.44%	3.33%	25.00%	33.33%
Avg Cleanliness Score	10.0	10.0	10.0	10.0	10.0	7.5	10.0	--	10.0
Avg Insurer Handle Claim Score	10.0	10.0	9.8	10.0	8.0	10.0	9.7	--	10.0
Avg Quality Score	10.0	10.0	10.0	10.0	5.0	10.0	9.3	--	10.0
Avg Recommend Insurer Score	10.0	10.0	10.0	9.3	8.0	10.0	9.7	--	10.0
Avg Recommend Shop Score	10.0	10.0	10.0	10.0	5.0	10.0	9.3	--	10.0
Avg Service Score	10.0	10.0	9.8	10.0	8.0	9.8	9.7	--	10.0
Kept Informed %	100.00%	100.00%	100.00%	100.00%	0.00%	100.00%	100.00%	--	00.00%
Repair Satisfaction %	100.00%	100.00%	100.00%	100.00%	0.00%	100.00%	100.00%	--	00.00%
Survey % of Vehicles Returned	--	--	--	--	--	--	--	--	--
Survey Sent Cnt	4	8	15	3	9	9	4	6	
Multiple Question Response Cnt	4	7	15	3	9	9	4	6	

**Important! All Reports are based on the Estimate Locked Date.**

From here, you can export the Report to Excel or as a PDF, email it, or save it.



You can also set up a Subscription to run and email this Report automatically.



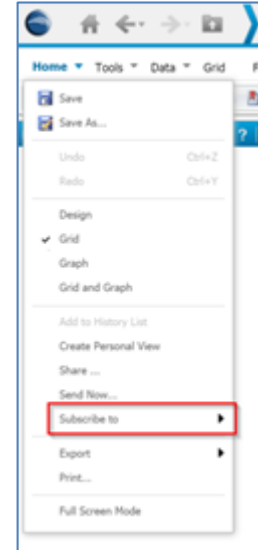
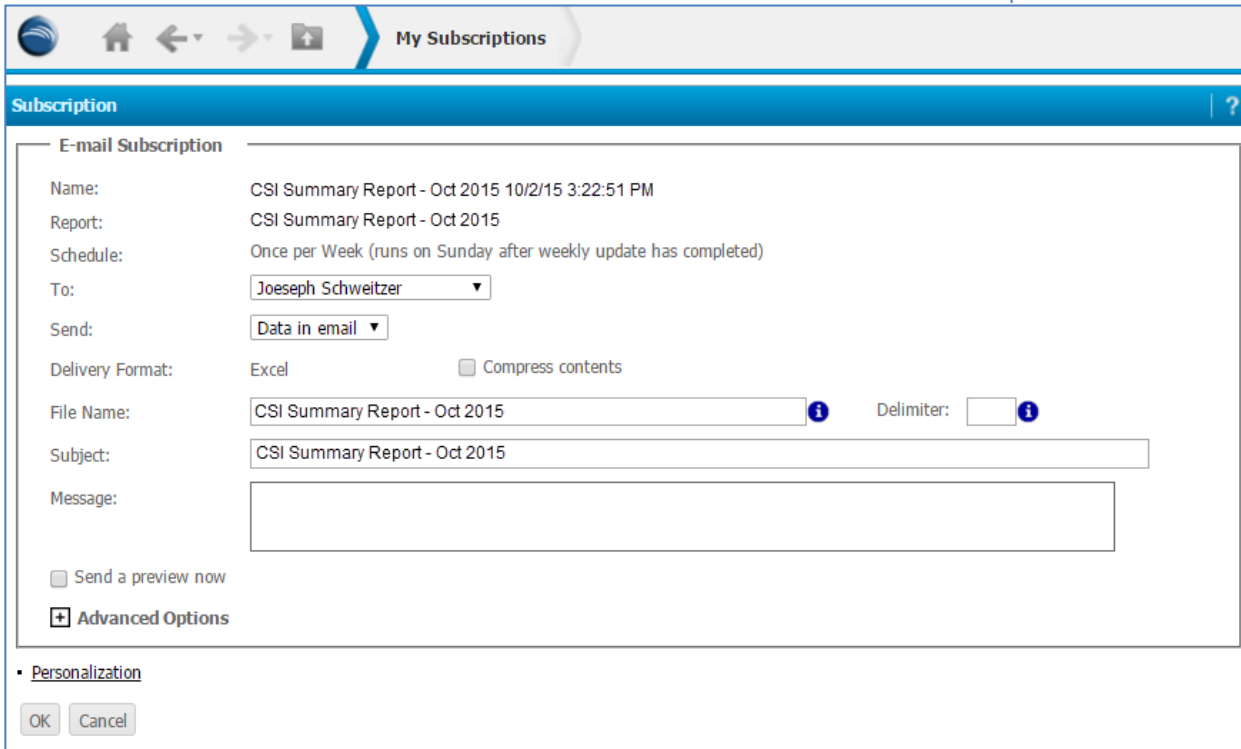
See the next to last section of this document for how to setup a Subscription to automatically run and send this Report.

## Create a Report Subscription

### Procedure

As mentioned in the Management Report documents, you can set up a Subscription for Update Plus Management Reports that you want to run periodically and email to yourself or others. Use the following steps to set up a Subscription:

Step	Action
1	After running a Report, go to <b>Home</b> and select <b>Subscription</b> .
2	Select the <b>Schedule</b> for running the Report and emailing it.
3	Enter desired <b>Email Addresses</b> .
4	Enter a <b>message</b> if needed.
5	Click <b>OK</b> .

**My Subscriptions**

**Subscription**

**E-mail Subscription**

Name: CSI Summary Report - Oct 2015 10/2/15 3:22:51 PM

Report: CSI Summary Report - Oct 2015

Schedule: Once per Week (runs on Sunday after weekly update has completed)

To:

Send:

Delivery Format: ☒ Excel ☐ Compress contents

File Name:  ? Delimiter:  ?

Subject:

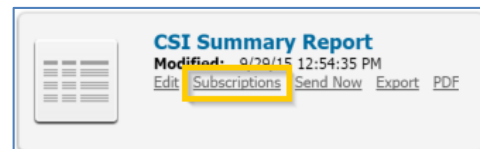
Message:

☐ Send a preview now

**+ Advanced Options**

**Personalization**

You can also view your current Subscriptions for a Report when accessing it from the Update Plus Reports folder.



## Update Plus Management Reporting Glossary

### Glossary

The following Metrics are used in the Management Reports.

Measure	Definition	Calculation
% of Survey Responses	Percentage of the number of claims that have a response for the CSI survey compared to the total number of claims where the survey was sent.	$\frac{\text{Survey Response Cnt}}{\text{Survey Sent Cnt}}$
Appraiser	The Appraiser is the Repair Facility that generated estimates or supplements for a given Insurance Company. The list will display the Company's name. All data for a single vehicle appraisal will be tied back to the Appraiser that generated the original Estimate of Record (i.e. supplements written by that Appraiser for his/her own estimates as well as supplements written by other Appraiser(s) for his/her own estimates will be tied back to the Appraiser that wrote the original Estimate of Record).	
Avg Cleanliness Score	Average score calculated from the responses of the "Cleanliness" question in the CSI survey. Sample Cleanliness question: "On a scale of 1-10, with 1 being lowest and 10 being highest, how would you rate your satisfaction with the cleanliness of the vehicle when it was returned to you by X Shop?".	$\frac{\text{Cleanliness Score}}{\text{Cleanliness Response Cnt}}$
Avg Insurer Handle Claim Score	Average score calculated from the responses of the "Handled Claim" question in the CSI survey. Sample Handled Claim question: "On a scale of 1 to 10 where 1 is very unsatisfied and 10 is very satisfied, how would you rate your satisfaction with the way X Insurance Group handled your claim?".	$\frac{\text{Insurer Handle Claim Score}}{\text{Insurer Handle Response Cnt}}$
Avg Quality Score	Average score calculated from the responses of the "Quality" question in the CSI survey. Sample question: "On a 1 to 10 scale where 1 is completely dissatisfied and 10 is completely satisfied, how would you rate your satisfaction with the quality of the repair?".	$\frac{\text{Quality Score}}{\text{Quality Response Cnt}}$
Avg Recommend Shop Score	Average score calculated from the responses of the "Recommend Shop" question in the CSI survey. Sample Recommend Shop question: As a result of this visit, on a scale of 1 to 10, where 1 is very unlikely and 10 is very likely, how likely is it that you would recommend the shop to a friend or family member?.	$\frac{\text{Recommend Shop Score}}{\text{Recommend Shop Response Cnt}}$
Avg Recommended Insurer Score	Average score calculated from the responses of the "Recommend Insurer" question in the CSI survey. Sample Recommended Insurer question: On a scale of 1 to 10 where 1 is very unlikely and 10 is very likely, how likely would you be to recommend X Insurance Company to a friend or family member?.	$\frac{\text{Recommend Insurer Score}}{\text{Recommend Insurer Response Cnt}}$

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## Update Plus Management Reporting Glossary, Continued

### Glossary, continued

Measure	Definition	Calculation
Avg Service Score	Average score calculated from the responses of the "Service" question in the CSI survey. Sample Service question: On a scale of 1-10, with 1 being lowest and 10 being highest, how would you rate your satisfaction with the customer service you received from X Repair Facility?.	Service Score / Service Response Cnt
Kept Informed %	Percentage of the number of claims that have the CSI survey where the "Kept Informed" question was answered "Yes" compared to the number of responses received for this question. Sample Kept Informed question: Did the shop keep you adequately informed during the repair process?.	Kept Informed Score / Kept Informed Response Cnt
Multiple Question Response Cnt	Number of claims that have a response for the CSI survey.	
Repair Satisfaction %	Score received from the Repair Satisfaction survey. Sample question: "Were you completely satisfied with your X Repair repair experience?".	
Survey % of On Time Delivery	Percentage of the number of claims where the vehicle was ready for pick-up as promised to the customer. This is determined using the "Was the vehicle ready when promised?" question in the CSI survey.	Vehicle Ready On Time Score / Vehicle Ready On Time Response Cnt
Survey % of Vehicles Returned	Percentage of the number of claims that have the CSI survey with the "Vehicle Returned" question answered "Yes" compared to the number of claims where this question was answered. Sample Vehicle Returned question: "After the repair, was it necessary to return your vehicle for rework?".	Vehicle Returned Score / Vehicle Returned Response Cnt
Survey Response Cnt	Number of claims who received a response for the CSI survey. A survey is considered completed when a customer responds to either the "Overall Repair Satisfaction" survey or the multiple question survey.	
Survey Sent Cnt	Number of claims that sent out the Multiple Question Customer Satisfaction survey.	