

**CCC Autoverse™
Repair Management Claim Folder
version 2.1**

Short & Easy Training Guide



CCC AUTOVERSE

Repair Management

CCC Autoverse™ Repair Management Claim Folder

version 2.1 for General Availability User Guide

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Accessing CCC Autoverse

Logging into CCC Autoverse™ Repair Management

- 1 Launch your Internet Explorer browser. To do this click Start > Programs > Internet Explorer.
- 2 Click once in the address field. Type **https://www.mycccportal.com** and press Enter.
- 3 Enter your username in the Username field. Enter your password in the Password field.
- 4 Click on the Login button. The CCC Autoverse Portal Page will appear.

Note: Please do not bookmark the Portal Login screen. Bookmark the Portal Page which is the next screen after login.

Getting Started with Claim Folder

Navigating the Portal Page

The screenshot shows the CCC Autoverse Portal Page with the following callouts:

- Links to functions the user can perform:** Search for Claim Folders, Search for Assignments, Create Claim Folder, Delete Claim Folder, Match and Send.
- Files to download:** Download Adobe Acrobat®, Download Insurance Company File, Autoverse Print Driver for Windows 95/98 or Windows NT/2000 or Windows XP, New Legend.
- Allows user to view a list of all assignments:** Points to the "New Assignments" table.
- A quick view of up to 10 assignments that need to be downloaded. To view a complete list of assignments, click on the [maximize...] link:** Points to the "maximize..." link above the "New Assignments" table.
- A quick view of up to 10 Claim Folders. To view a complete list of assigned claim folders, click on the [maximize...] link:** Points to the "maximize..." link above the "Active Claim Folders" table.
- A quick view of up to 10 alerts indicating that someone wants you to be aware of a note regarding the claim:** Points to the "Messages" section.

The "New Assignments" table contains the following data:

Select	Claim Reference ID	Insurance Company	Date of Loss	Owner	Vehicle	Actions
<input type="checkbox"/>	emhtest01162003a	CCC INSURANCE COMPANY		hayden, erika		[Download] [Print] [Maximize]
<input type="checkbox"/>	LNEVISION1	CCC INSURANCE COMPANY	01/13/2003	Rush, Geoffrey	1998 Ford TAURUS SE	[Download] [Print] [Maximize]
<input type="checkbox"/>	RMEISTER1	CCC INSURANCE COMPANY	01/13/2003	Hoffman, Dustin	1997 Toyota CAMRY CE	[Download] [Print] [Maximize]
<input type="checkbox"/>	DLS1002	CCC INSURANCE COMPANY	01/01/2003	Brunoli, Carla	1994 Chevrolet CAPRICE CLASSIC LS	[Download] [Print] [Maximize]
<input type="checkbox"/>	DLS1003	CCC INSURANCE COMPANY	01/01/2003	Barlett, Bill	1999 Mercury SABLE LS	[Download] [Print] [Maximize]
<input type="checkbox"/>	DLS1004	CCC INSURANCE COMPANY	01/01/2003	Valentine, Rudy	2000 BMW M	[Download] [Print] [Maximize]
<input type="checkbox"/>	emhtest01162003b	CCC INSURANCE COMPANY	04/15/2002	HAYDEN, ERIKA	1995 LANDCRUISER	[Download] [Print] [Maximize]

The "Active Claim Folders" table contains the following data:

Claim Reference ID	Insurance Company	Date of Loss	Owner	Vehicle	Actions
emhtest01162003a	CCC INSURANCE COMPANY		hayden, erika		[Download] [Print] [Maximize] [Close]
Car	CCC INSURANCE COMPANY	01/16/2003	Smith, John	1999 SATU SL1	[Download] [Print] [Maximize] [Close]
LNEVISION1	CCC INSURANCE COMPANY	01/13/2003	Rush, Geoffrey	1998 FORD TAURUS SE	[Download] [Print] [Maximize] [Close]
RMEISTER1	CCC INSURANCE COMPANY	01/13/2003	Hoffman, Dustin	1997 TOYO CAMRY CE	[Download] [Print] [Maximize] [Close]
DLS1002	CCC INSURANCE COMPANY	01/01/2003	Brunoli, Carla	1994 CHEV CAPRICE CLASSIC LS	[Download] [Print] [Maximize] [Close]
DLS1003	CCC INSURANCE COMPANY	01/01/2003	Barlett, Bill	1999 MERC SABLE LS	[Download] [Print] [Maximize] [Close]
DLS1004	CCC INSURANCE COMPANY	01/01/2003	Valentine, Rudy	2000 BMW M	[Download] [Print] [Maximize] [Close]
emhtest01162003b	CCC INSURANCE COMPANY	04/15/2002	HAYDEN, ERIKA	1995 45 LANDCRUISER	[Download] [Print] [Maximize] [Close]

The "Messages" section shows: "There are no messages".

After you log into CCC Autoverse Repair Management, you are at the CCC Autoverse Portal Page. The Portal Page contains links, utilities, Active Claim Folders, new Message Alerts and a list of new assignments.

To return back to the Portal Page, click the Home button on the upper right corner of your screen.

Retrieving New Assignments

On the CCC Autoverse Portal Page there is a list of new assignments that have never been downloaded, but have possibly been viewed. Only 10 new assignments appear in this list. If there are more than 10 assignments, you must click on the [maximize...] link to show the full list of new assignments.

Downloading New Assignments

- 1 If you haven't already, log into CCC Autoverse.
- 2 On the Portal Page, you will see a list of new assignments.
- 3 Place a checkmark next to the assignment you want to download.
 - a) If you want to download all the assignments that are listed, click the button that reads Select All.
 - b) If you have made a mistake and would like to clear the checkmarks and start over, click the Clear button.
- 4 Click the Download button
- 5 In the resulting Assignment Download Confirmation popup window, you will see a list of the assignments you chose to download.
- 6 Using the dropdown menu, select the collision estimating system to which you are downloading the assignment (e.g. ADP - Shoplink™, Mitchell - Ultramate®).
- 7 Once the collision estimating system is selected, the path where the file will be saved is displayed. Using the Browse button, you can change the directory location. To change the default directory permanently, please call CCC.

Note: This path should match the EMS directory location you previously set up for your collision estimating system.

- 8 Click on the Download button within the Assignment Download Confirmation window.
- 9 If the download is successful, you will receive a message indicating that the system successfully downloaded the assignment(s). This confirmation will also indicate the directory where the files were downloaded.

Note: For first-time users, it is helpful to write down the location where the files have been downloaded. Should you not be able to locate your assignment, you will know where they are stored and can retrieve them.

- 10 Click OK.
- 11 You have successfully downloaded assignments to your collision estimating system. You should now open your collision estimating system and import the assignments.

Importing and Exporting Assignments

The assignment must be imported into the estimating system so that the estimate can be written. Once the estimate is finished, an EMS extract must be exported from the estimating system to CCC Autoverse. Each estimating system does this differently; you may need to consult the estimating system's documentation to access more detailed information regarding this process.

ADP®

ShopLink™ is a product of Automatic Data Processing, Inc.

Importing Assignments into ADP ShopLink from CCC Autoverse

- 1 Open ADP ShopLink 6.2
- 2 From the File menu, select Import CIECA Files.
- 3 A screen will display all of the downloaded assignments from the CCC Autoverse Web site.

Note: If the assignments do not automatically appear, click Browse to select the location of the CIECA files.

- 4 Highlight the assignment(s) that you want to import and click the Import button
- 5 You are prompted to review the CIECA Import Log, click No.
- 6 Assignment(s) are imported into the Estimate File list.
- 7 **Write the estimate.** Please include the insurance company and the claim reference ID in the correct estimate fields.
- 8 **Create a Print Image of the estimate using the CCC Autoverse Workflow Print Driver.** Please see the section of this guide entitled: Creating a Print Image of the Estimate

Exporting EMS data from ADP ShopLink to CCC Autoverse

Once the estimate is written, an EMS extract must be exported from the estimating system to CCC Autoverse.

Automatically

- 1 When closing an estimate, ShopLink will give you the option: Transfer to R/O.
- 2 Checking off the box will export a copy of the selected estimate to the folder C:\ADP\EMSOUT

Manually

- 1 From the Estimate File list; select the estimate file(s) you want to export.
- 2 On the File menu, click Export Files
- 3 The destination directory for exported files displays in the Directory Name field. This directory should match the one set in the BSMS Import/Export section of the shop profile: C:\ADP\EMSOUT
- 4 The File Format should read CIECA.
- 5 Click OK. Wait while file information is transferred to the destination directory.

Importing Assignments to PenPro from CCC Autoverse

- 1 Log in to PenPro using an appraiser's profile that has CIECA (EMS) enabled.
- 2 At the Claims screen, click the Receive button.
- 3 The dropdown under What should read: Assignments.
- 4 The dropdown under Where should read: CIECA.
- 5 The import directory should read C:\ADP\EMSIN. If it doesn't, you will need to use the Browse button to point to the C:\ADP\EMSIN folder you created.
- 6 The assignments that you exported from the CCC Autoverse Web site will be listed in the Select Assignments list.
- 7 Highlight the assignments you want to import.
- 8 Click the Import button.
- 9 After the import has completed, an Import Results window will open. There are two sections to the log, one for successful imports and one for unsuccessful imports.
- 10 After reviewing the log, you can either print the log, or you can close it.
- 11 **Write the estimate.** Please include the insurance company and the claim reference ID in the correct estimate fields.
- 12 **Create a Print Image of the estimate using the CCC Autoverse Workflow Print Driver.** Please see the section of this guide entitled: Creating a Print Image of the Estimate

Exporting EMS data from PenPro to CCC Autoverse

- 1 At the Claims screen click the Send button.
- 2 In the resulting dialog box, change the Where field to read CIECA.
- 3 A new window will open.
- 4 Choose Assignment from the dropdown list under the word, What.
- 5 Choose CIECA from the dropdown list under the word, Where.
- 6 The export directory should read C:\ADP\EMSOUT. If it doesn't, you will need to use the Browse button to point to the C:\ADP\EMSOUT folder you created.
- 7 From the Select Claims list, highlight the claims you want to export.
- 8 Click the Export button.
- 9 After the export has completed, it will show you the log of what happened. There will be two lists, one for successful exports one for unsuccessful exports. After reviewing the log, you can either print the log, or you can close it.

Mitchell®

UltraMate™ is a product of Mitchell International, Inc.

Importing Assignments to Mitchell from CCC Autoverse

- 1 UltraMate automatically imports EMS assignments. You will know that an assignment has been imported because an Imported EMS Assignments popup window appears.
- 2 On the toolbar click, File > Open > Assignment.
- 3 A File Selection window appears where you may locate the assignments that were automatically imported.
- 4 Highlight the assignment and click Open to access the Administration data.
- 5 **Write the estimate.** Please include the insurance company and the claim reference ID in the correct estimate fields.
- 6 **Create a Print Image of the estimate using the CCC Autoverse Workflow Print Driver.** Please see the section of this Guide entitled: Creating a Print Image of the Estimate

Exporting EMS data from Mitchell to CCC Autoverse

Once the estimate is written, an EMS extract must be exported from the estimating system to Autoverse.

Automatically

- 1 Once the estimate has been written, choose Repairs > Calculate from the menu or click on the re-calc button.

Note: The Re-Calc button (circled in the screenshot to the left) is used after opening and editing an existing estimate. Click on the Re-Calc button once all the new lines are added. Commit and close the file to re-export the EMS file. You must click on the Re-Calc button in order to Commit and Close the estimate.

- 2 When you are ready to commit the estimate, choose File > Commit from the menu. Committing the estimate also exports its EMS image to the EMS export directory, replacing any previous version that already exists there.

Manually

- 1 Highlight a file
- 2 Select Utilities > Tasks > Export

Creating a Print Image of the Estimate

After creating the EMS extract, you must create a Print Image of the estimate. To do this, you will need to use the Print driver you installed during the setup portion of CCC Autoverse.

- 1 Within your estimating system, select the estimate for which you just created the EMS Extract.
- 2 Choose File-> Print from the toolbar.
- 3 The default printer must be changed to CCC Autoverse Workflow PrintDriver.
- 4 If you can change the printer from the estimating system's Print dialog box do so, otherwise click the button that reads: Setup.
- 5 The Microsoft Print dialog box will appear. Choose CCC Autoverse PrintDriver from the Printer drop down box.
- 6 Continue to Print the document.

Note: The printer will not print the estimate. Instead the estimate will be printed to a file that can be imported into CCC Autoverse.

- 7 A dialog box will open. Choose the Insurance Company from the Insurance Company Drop down list.
- 8 In the Claim Reference ID field type the Claim Reference ID for the assignment. It is important that you put the exact claim reference ID since CCC Autoverse uses this information to match the file with the correct Claim Folder.
- 9 There are four report types available: Estimate, Supplement, Claim Summary Report, or Other. Choose the type that fits the assignment you are currently working on. Typically, you will choose Estimate or Supplement.
- 10 Next to the Report Type is a drop down list with numbers. Select a value to associate to this report. If this is the second supplement, choose 02 from the drop down list.
- 11 Click OK.
- 12 A confirmation will pop up that reads: Document successfully generated. Click OK

Note: It is recommended that before you create the print image of the estimate you copy the claim reference ID from the estimate so you can easily paste it into the claim reference ID field.

Supplements

Supplements are sometimes unavoidable. If you find there is supplemental damage after you have uploaded the original estimate to the CCC Autoverse Claim Folder you must create a supplement and upload it as you did with the original estimate.

- 1 Write the supplement
- 2 Create EMS extract
- 3 Create a Print Image. In the report type field of the Print Image dialog box, choose Supplement and in the number field afterward, choose the correct Supplement number.
- 4 Open CCC Autoverse and enter the Match Files screen from the Match and Send link on the Portal Page.
- 5 Click on the appropriate Claim Folder and match the EMS and Print Image document to the Claim Folder. If there are any supplemental images, you must add them at this time.
- 6 Send the Claim Folder to the Insurance Company.

Note: Up to 99 supplements are permitted per workfile. You may need to notify the Insurance Company to re-open the file if you find you are unable to send the supplement.

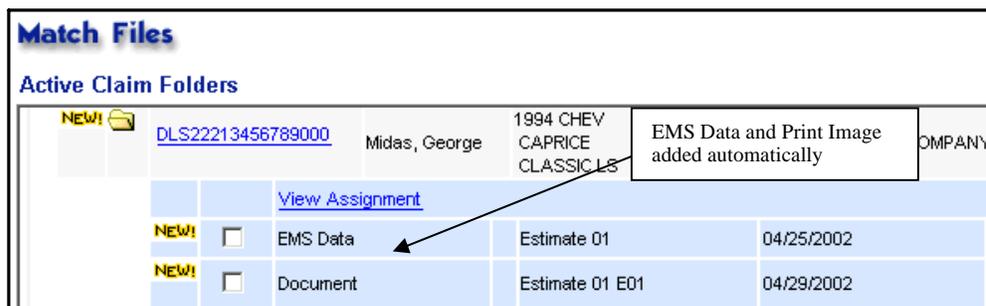
Working with Claim Folders

Once an EMS extract is created and a print image is made, you can upload the files to the appropriate claim folder within CCC Autoverse.

Automatically Matching EMS Data and the Print Images

Ideally, the EMS extract and the Print Images will match automatically to the Claim Folder.

- 1 Go to the CCC Autoverse Portal Page.
- 2 Click on the Match and Send link on the left side of the CCC Autoverse Portal Page. You will be taken to the Match Files screen.
- 3 Click on the Claim Reference ID from the Active Claim Folders list to view matched documents. Matched documents will have a New Icon next to them in the Active Claim Folders screen.
- 4 Within the Matched Files screen, the EMS Data and the Print Image document will appear as single lines.



Match Files					
Active Claim Folders					
	DLS22213456789000	Midas, George	1994 CHEV CAPRICE CLASSIC LS	EMS Data and Print Image added automatically	COMPANY
		View Assignment			
	<input type="checkbox"/>	EMS Data	Estimate 01	04/25/2002	
	<input type="checkbox"/>	Document	Estimate 01 E01	04/29/2002	

If the EMS Data doesn't automatically match, did you include the insurance company and claim reference ID in the proper fields when you wrote the estimate in your collision estimating system?

Note: If the wrong EMS Data or Print Image document attached, place a checkmark in the checkbox and click on the Unmatch button below the Active Claim Folders portion of the data pane. This will remove the files from the Claim Folder. You will now have to manually match the files.

Note: A claim folder becomes inactive if more than 14 days have elapsed since the claim folder was created; an estimate, supplement, or document was added to the claim folder; or digital images were added to the claim folder. However, you can manually "activate" a claim folder. For instructions on manually activating a claim folder, see the "Manually Activating a Claim Folder" section.

Manually Matching EMS Data

At times, the data may not automatically match to the Claim Folder. When this happens, you will need to manually match the data.

- 1 Open the appropriate Claim Folder within the Active Claim Folders window.
- 2 Click on the EMS Data tab that is located in the Unmatched Files portion of the Data pane to see the unmatched EMS data that was recently created. This tab may already be displayed.
- 3 In the Unmatched Files portion of the Data pane, place a checkmark next to the unmatched EMS file and click the Match button. This will copy the EMS data to the Claim Folder.

Match Files

Active Claim Folders

	DLS22213456789000	Midas, George	1994 CHEV CAPRICE CLASSIC LS	EDRP TEST INS COMPANY 1
View Assignment				
	S3332154677785		1999 CHEV G20 4X2 EXPRESS EXT	EDRP TEST INS COMPANY 1
	Dennis_test_005	SIMPSON, BART	1994 FORD TAURUS GL	IL 9123789 EDRP TEST INS COMPANY 1
	adp22	CTS	1989 HOND ACCORD LXI	CA 1ABC123 EDRP TEST INS COMPANY 1

UnMatch

Unmatched Files

EMS Data Documents Images

	Claim Reference ID	Vehicle Owner	Vehicle	Insurance Company	Clai
<input checked="" type="checkbox"/>	DLS22213456789000	Midas, George	1994 CHEV CAPRICE CLASSIC LS		

Note: Once the EMS data has been transferred, a new line appears in the Match Files screen and the EMS data in the Unmatched Files screen becomes grayed out and italicized meaning it has been matched to a Claim Folder.

Match Files

Active Claim Folders

	DLS22213456789000	Midas, George	1994 CHEV CAPRICE CLASSIC LS	EDRP TEST INS COMPANY 1
View Assignment				
	DLS3332154677785		1999 CHEV G20 4X2 EXPRESS EXT	EDRP TEST INS COMPANY 1
	Dennis_test_005	SIMPSON, BART	1994 FORD TAURUS GL	IL 9123789 EDRP TEST INS COMPANY 1
	adp22	CTS	1989 HOND	CA 1ABC123 EDRP TEST INS COMPANY 1

UnMatch

Unmatched Files

EMS Data Documents Images

	Claim Reference ID	Vehicle Owner	Vehicle	Insurance Company	Clai
<input type="checkbox"/>	<i>DLS22213456789000</i>	<i>Midas, George</i>	<i>1994 CHEV CAPRICE CLASSIC LS</i>		

Manually Matching Print Image Documents

- 1 Click on the Document tab that is located in the Unmatched Files portion of the Data pane.
- 2 The unmatched print image document that was recently created will appear within the Documents tab.
- 3 In the Unmatched Files portion of the Data pane, place a checkmark next to the Document file and click the Match button. This will copy the print image document to the Claim Folder

Match Files

Active Claim Folders

NEW!	DLS22213456789000	Midas, George	1994 CHEV CAPRICE CLASSIC LS		EDRP TEST INS COMPANY 1
View Assignment					
NEW! <input type="checkbox"/>	EMS Data		Estimate 01		04/25/2002
	DLS3332154677785		1999 CHEV G20 4X2 EXPRESS EXT		EDRP TEST INS COMPANY 1
	Dennis_test_005	SIMPSON, BART	1994 FORD TAURUS GL	IL 9123789	EDRP TEST INS COMPANY 1
	adn22	CTS	1989 HOND	CA 1&BC123	EDRP TEST INS COMPANY 1

UnMatch Match

Unmatched Files

Documents | **Images**

<input type="checkbox"/>	Claim Reference ID	Document Name	Insurance Company
<input checked="" type="checkbox"/>	DLS22213456789000	Estimate 01	EDRP TEST INS COMPANY 1

Annotations in image: Step 1 points to the 'Documents' tab; Step 2 points to the checkmark in the Unmatched Files table; Step 3 points to the 'Match' button.

Note: Once the Print Image document has been transferred, a new line appears in the Match Files screen. The Print Image document in the Unmatched Files screen will become grayed out and italicized meaning it has been matched to a Claim Folder.

Match Files

Active Claim Folders

NEW!	DLS22213456789000	Midas, George	1994 CHEV CAPRICE CLASSIC LS		EDRP TEST INS COMPANY 1
View Assignment					
NEW! <input type="checkbox"/>	EMS Data		Estimate 01		04/25/2002
NEW! <input type="checkbox"/>	Document		Estimate 01 E01		04/29/2002
	DLS3332154677785		1999 CHEV G20 4X2 EXPRESS EXT		EDRP TEST INS COMPANY 1
	Dennis_test_005	SIMPSON, BART	1994 FORD TAURUS GL	IL 9123789	EDRP TEST INS COMPANY 1

UnMatch Match

Unmatched Files

Documents | **Images**

<input type="checkbox"/>	Claim Reference ID	Document Name	Insurance Company
<input type="checkbox"/>	<i>DLS22213456789000</i>	<i>Estimate 01</i>	<i>EDRP TEST INS COMPANY 1</i>

Annotations in image: 'New line' points to the 'Document' row in Active Claim Folders; 'Line is grayed out and italicized.' points to the row in Unmatched Files.

Attach Images

Images must be attached from within the CCC Autoverse Web page and must be in .jpg file format.

- Take the required pictures of the vehicle with your digital camera.
- Transfer the images to your computer, placing them in a predefined folder on your hard drive.

Note: It is best to have a folder that is used exclusively to store vehicle images. Make sure you know where this folder is located so that you can navigate to it. Additionally, it is recommended that the image files have identifiable names that will make it easy to recognize them later when it is time to import them into CCC Autoverse.

- 1 Open the appropriate Claim Folder within the Active Claim Folders window.
- 2 In the Unmatched Files data pane, click on the Images tab.
- 3 If images automatically appear, skip to step 7. If you see text that reads: No Images Found, continue to step 4.
- 4 In the Images tab, on the Action bar, click on the Browse button.
- 5 A Choose Directory window will open. Navigate to the folder that holds the vehicle images.
- 6 With the correct file highlighted, click the Choose button. The Images tab will fill with the images that are located in the folder you chose
- 7 Click the checkbox next to the images you want to attach to the Claim Folder.
- 8 Once all the checkmarks are in place, click the Match button.

The screenshot shows the 'Match Files' interface in CCC Autoverse. It is divided into two main sections: 'Active Claim Folders' and 'Unmatched Files'.
Active Claim Folders: A table lists claim folders. A callout 'Step 1' points to a folder ID 'DLS22213456789000'. Below the table are buttons for 'Unmatch', 'Match', and 'Send Files'. A callout 'Step 8' points to the 'Match' button.
Unmatched Files: This section has three tabs: 'EMS Data', 'Documents', and 'Images'. A callout 'Step 2' points to the 'Images' tab. Below the tabs, several image thumbnails are displayed with checkboxes. A callout 'Step 7' points to a checked checkbox. A callout 'Step 4' points to a 'Browse' button at the bottom right.
Choose Directory: A separate window is open, showing a file explorer view of the 'C:\photos' directory. A callout 'Step 5' points to the 'photos' folder, and a callout 'Step 6' points to a selected file 'DLS22345789'. The 'Directory' field at the bottom shows 'C:\photos\DLS22345789' and a 'Choose' button is visible.

- 9 Once you click on the Match button, the images will be copied into the Claim Folder.

Note: If you added an image mistakenly, click on the checkbox next to the file and then click on the Unmatch button. This will remove the image from the claim folder.

Adding a note to an Image

- 1 To add a note to an image, click on the note icon that resides on the line to the left of the date.
- 2 Fill out the fields and when finished, click the Save button.

Send Claim Folder to Insurance Company

Once the EMS data, print image document, and the images are matched to the correct Claim Folder, it is time to send the files to the insurance company.

- 1 In the Active Claim Folders portion of the data pane, click on the Send Files button.
- 2 The files that will send appear in a list.
- 3 The checkmarks will be in place. Review the items to make sure they are correct. If the items are correct, click the Send Now button at the bottom of the page.
- 4 A window will pop up asking if you want to delete all EMS data after upload. The answer to this question depends on whether you will need the EMS data for other programs such as a management system. Typically, the answer is Yes, delete the EMS data.

Note: If the send function fails, the EMS data will not be deleted so you are able to perform a resend at a later time.

- 5 Another window will pop up asking if you want to delete all digital images after the upload. Again, the answer depends on whether you want to retain the images. Typically, the answer is Yes, delete digital images.
- 6 A new screen will appear that tells you which files were successfully sent.

Note: If you experience an unsuccessful send operation, try to resend. To resend, make sure the checkbox has a checkmark and then click the Send Now button on the action bar. If you continue to have issues sending, call Technical support at 1-800-637-8511.

Printing Assignments

You can print assignments from the Portal Page.

- 1 From the Portal Page, click on the View Assignment icon. 
- 2 A new window will open. This window contains the assignment information that the insurance company sent.
- 3 The assignment is spread over 6 tabs: Loss and Adjuster, Party & Claim, Vehicle, Damage, Recipient, and Policy & Agent. Click on the tabs to move through these different screens.
- 4 Scroll to the bottom of the page and click on the Print Options button.
- 5 A second window will open with an Adobe Acrobat version of the assignment.
- 6 Click on the printer icon in the upper left hand corner.
- 7 Choose your printer in the resulting Printer Dialog box and print as usual.

Searching for Assignments

To see assignments that have been removed from the Download/View Assignments screen, you must perform a search. In order to begin your search, you must be on the Portal Page. Click the home button in the upper right corner of the page to return to the Portal Page from any other CCC Autoverse page.

- 1 At the Portal Page, click on the Search for Assignments link on the left hand side of the page.
- 2 The Assignment Search screen will open.
- 3 On the Assignment Search screen, fill out as much information as you can about the assignment or group of assignments for which you are searching.
- 4 Click the Search button once you have filled out your search criteria.
- 5 The Assignment Search Results page opens.
- 6 From the Assignment Search Results screen, you can delete, download or print the assignment(s) that matched your search criteria.

Searching for a Claim Folder

A claim folder becomes inactive if more than 14 days have elapsed since the claim folder was created; an estimate, supplement, or document was added to the claim folder; or digital images were added to the claim folder. However, you can manually "activate" a claim folder. To do this you must first find the Claim Folder.

- 1 At the Portal Page, click on the Search for Claim Folders link on the left hand side of the page.
- 2 The Assignment Search screen will open.
- 3 On the Claim Folder Search Criteria screen, fill out as much information as you can about the Claim Folder or group of Claim Folders for which you are searching.
- 4 Click the Search button once you have filled out your search criteria.
- 5 The Assignment Search Results page opens
- 6 Select the claim folders that you would like to make active by clicking in the selection box. Once you have selected all the claim folders that you would like to "activate," click on the Add to Active button at the bottom-right of the page.

Working with Notes

Creating Notes

You can create a note and have it send with the estimate to be viewed by the Insurance Reinspector or Insurance Office Contact reviewing the Claim Folder.

- 1 From the Portal Page, click on the View Note icon next to the Claim Folder for which you want to create the note.
- 2 The Note screen opens
- 3 Enter a subject and message. If this is an urgent message, flag it by putting a checkmark in the Priority box.
- 4 Click the Spell Check button to have your message checked for spelling errors. The spell check will highlight possibly misspelled words in red and provide suggestions for change. You can choose to use one of the suggested words or ignore the word and continue checking the rest of the note for possibly misspelled words.
- 5 Once the spell check is complete, you will see a message stating that there are no more spelling errors. From here, you can return to editing the note by choosing the Edit Note button.
- 6 When you have completed your note, you can either save the note to the claim folder or you can save the note to the claim folder and notify others that there is a note they should read.
- 7 Typically you will click the Save & Notify button.
- 8 When you select Save & Notify, you are provided with a list of all individuals associated with the claim folder. This list of associated individuals is comprised of the adjuster assigned, the office designated person (if one is listed for the claim office), reviewer assigned to the appraisal source, and the appraiser
- 9 To choose a contact to be notified, simply place a check in the checkbox next to the person you would like to notify. You also have the ability to include notification to other individuals by manually typing in their e-mail address.

Viewing Notes Sent by the Insurance Company

Notes sent by the Insurance Company will appear on the Portal Page.

- 1 Click on the link in the message column.
- 2 A window will pop up containing the note.
- 3 From here, you can easily read or print the message. However, to reply, you must view the note from within the claim folder.

Replying to a Notes Sent by the Insurance Company

- 1 From the Portal Page, click on the View Note icon next to the Claim Folder you want to view the note.
- 2 The Note screen opens
- 3 To view the note fully, simply click on the blue text of the subject line.
- 4 From this screen, you are able to reply to the note, go back to the previous notes screen, or print the message.
- 5 To reply to the Note, click on the Reply icon.
- 6 A new Note will appear. The subject line will default to Re: [subject of message you are replying to]. However, you can change the subject line if you desire.
- 7 You have the ability to quote the original message by clicking on the [quote original] link. This will include all text from the previous note with a caret (>) in front of each line of text.
- 8 You can choose to make the note urgent by placing a check in the checkbox next to those options.
- 9 Then, you simply type your note. The maximum length of a note is 1,000 characters. If you type more than that, you will receive an error message.
- 10 Once you have finished typing your note, Click the Spell Check button to have your message checked for spelling errors. The spell check will highlight possibly misspelled words in red and provide suggestions for change. You can choose to use one of the suggested words or ignore the word and continue checking the rest of the note for possibly misspelled words.
- 11 Once the spell check is complete, you will see a message stating that there are no more spelling errors. From here, you can return to editing the note by choosing the Edit Note button.
- 12 When you have completed your note, you can either save the note to the claim folder or you can save the note to the claim folder and notify others that there is a note they should read.
- 13 Typically you will click the Save & Notify button.
- 14 When you select Save & Notify, you are provided with a list of all individuals associated with the claim folder. This list of associated individuals is comprised of the adjuster assigned, the office designated person (if one is listed for the claim office), reviewer assigned to the appraisal source, and the appraiser
- 15 To choose a contact to be notified, simply place a check in the checkbox next to the person you would like to notify. You also have the ability to include notification to other individuals by manually typing in their e-mail address.

Viewing the Claim Folder

You can view the contents of the claim folder by clicking on the Claim Reference ID from the Portal Page.

- 1 Click on the Claim Reference ID
- 2 The Claim Folder View opens.
- 3 There are 4 tabs that display: Summary, Assignment, Notes, and Manage.

Summary

The Summary tab displays the Claim Folder Summary page, which is a collection of information about the claim folder. You'll see three types of information on this page: (1) Claim, (2) Vehicle Information, and (3) Vehicle Owner.

Assignment

The Assignment tab displays information about the assignment and has six "sub-tabs:"

- | | | |
|--------------------|-----------|------------------|
| 1. Loss & Adjuster | 4 Vehicle | 6 Recipient |
| 2. Party & Claim | 5 Damage | 7 Policy & Agent |

Printing Within the Claim Folder Assignment Tab

Clicking on the Print Options button automatically produces a printer-friendly copy of the assignment that opens in Acrobat Reader.

Notes

In the Notes tab, you can view Claim Folder Notes, create new Claim Folder Notes, and reply to existing Claim Folder Notes.

At the top of the page, you will see a link that will allow you to create a note. Below that, you will see a list of notes that are associated with this claim folder. These notes appear in date and time order with the most recent at the top of the list. We have added a small circle next to each message. When this circle is red, it means that the message is new since your last visit to the page. A red diamond indicates a priority note.

Also included is information on who sent the note and when the note was posted to the claim folder.

Manage

The Manage Tab provides you with the ability to download the assignment or Send Files to the Claim Folder to match and send. Additionally, you can view the Contacts associated with the Claim.

Payment Requests

The Payment Request feature was created to support future functionality and **should not be used with the current release.**

You **can** use the Download Assignment and Send Files to Claim Folder links as well as the view the Contacts' information.

Glossary

Assignment

Information sent by the insurance company to an appraiser about the insured, type of loss and its location, extent of damage, policy coverage, and agent.

CIECA

Collision Industry Electronic Commerce Association. This is the standard that CCC Autoverse uses to extract estimate information.

Claim Folder

The claim folder is an electronic unit of storage that contains data and comments relating to a claim i.e. estimate admin data, associated documents, digital images, events and documents. There is one claim reference ID per claim folder. Claim folders are created automatically when an assignment is created.

Claim Reference ID

A unique number used to identify a claim sent by an insurance company.

EMS

Electronic Management System. Extracts the estimate so it can be used in other programs in addition to the estimating system that created it.

Matched Files

Files such as EMS data, Print Image, or Digital Images that have been matched with the proper Claim Folder.

CCC Autoverse

A Web-based administrative tool made up of a suite of component tools for the auto insurance industry.

Print Driver

A program that controls a printer. Whenever you print a document, the printer driver takes over, feeding data to the printer with the correct control commands.

Print Image

An electronic copy of the printed document. This image can then be uploaded or downloaded via the Internet.

UDS

Universal Data Storage. This is not the standard that CCC Autoverse uses.

Unmatched File

Files such as EMS data, Print Image, or Digital Images that have NOT been matched with the proper Claim Folder.

