

# QCS Client Portal – Desk Review Feature Description

QCS Desk Review allows an estimate for a claim to be uploaded and audited according to the benefits sheet of the insurance carrier and policy of the claim being reviewed. The Desk Review process will also audit any claim supplements and may include a total loss valuation if the estimate reaches a specific per-vehicle threshold and total loss is configured for the client.

This document will describe the basic process of submitting a claim for Desk Review as well as the main features offered by QCS Desk Review in the Client Portal.

## Creating a new Desk Review Assignment

To create a new Desk Review assignment, click on “New Desk Review” under “QCS Desk Review” in the Client Portal main menu:

The screenshot shows the 'Create New Desk Review Claim' interface in the QCS Client Portal. The left sidebar contains a navigation menu with 'New Desk Review' highlighted in red. The main content area is titled 'Loss Information' and contains several input fields: 'Claim Number' (required, highlighted in red), 'Policy Number', 'Insurance Carrier' (North Star Mutual), 'Assigned Adjuster' (Scott Hill), 'Loss Type' (Collision), 'Date of Loss' (Mar 19, 2019), and 'Deductible Amount'. Below this is a 'Remarks' field. The 'Shop and Vehicle Information' section includes 'Shop Name' (required), 'Shop Phone Number', 'Point Of Impact' (Unknown), 'VIN' (required - 'UNK' if unavailable), 'Make', 'Model', and 'Year' (Select Year). A red box at the bottom right of the form contains the text 'enter claim number to create draft'.

**Creating a Draft:** Once the claim number has been entered for a Desk Review assignment, the Client Portal will automatically create a Desk Review draft. Any changes made after a draft is created are automatically saved to the server. Desk Review assignments can be created and saved for submission at any time.

Attachments

(none)

Attach Claim Files Here

Drag attachments here or click to select files

The following data is required for submission:

Owner First Name or Company    Owner Zip

Missing Data Indicator

Delete Draft    Autosave On    Print/Submit

**Checking the Form:** Enter all required values to submit an assignment. If any required values are missing, the New Desk Review page will indicate the missing values just above the “Print/Submit” button. Also make sure to attach any estimates, photographs, or other pertinent files using the “Attachments” control, shown above.

Attachments

test claim file.pdf Attachment 3/19/2019

Drag attachments here or click to select files

"Print/Submit" is Enabled

Delete Draft    Autosave On    Print/Submit

**Submitting an Assignment:** Once all required values are entered, the “Print/Submit” button will be enabled and the assignment is ready for submission. After submitting an assignment, the Client Portal will redirect to the Desk Review Details page.

# Desk Review Details Page

The Desk Review Details Page shows the current status, claim details and any estimate review results.

**Client Portal** Desk Review TEST2-6-19-V2 In Review

**Claim Details**

STATUS	In Review
CLAIM NUMBER	TEST2-6-19-V2
POLICY NUMBER	BOP987654321
INSURANCE CARRIER	North Star Mutual
ASSIGNED ADJUSTER	JAMES WALKER
SUBROGATION	No
DEDUCTIBLE	\$500.00
DATE OF LOSS	2.06.2019
LOSS TYPE	Collision
DATE ENTERED	2.06.2019
DATE RECEIVED	2.06.2019
LAST UPDATED	2.06.2019
REMARKS	TEST EXAMPLE

**Shop**

SHOP NAME	BILLION COLLISION
PHONE	605-222-1111
CONTACT SHOP	Yes

**Vehicle**

VEHICLE	2012 Nissan Altima
VIN	1N6AL1CP7C2000000
POINT OF IMPACT	Front and Rear
HEAVY EQUIPMENT	No

**Owner**

OWNER NAME	CARREY WICKHILL
ZIP	92101
PHONE	605-777-7777
EMAIL	OWNEREMAIL@EMAIL.COM
ADDRESS	777 MAIN STREET KANSAS CITY, MO
OWNER STATUS	Claimant
INSURED NAME	INSURED FIRST INSURED LAST

**Review Results**

INITIAL AMOUNT	pending...
REVIEWED AMOUNT	pending...
DATE RECEIVED	2.06.2019
DATE COMPLETED	pending...
AUDITOR EMAIL	

**Attachments**

PIC 3 .jpg	Attachment	2/06/2019
PIC 2.jpg	Attachment	2/06/2019
PIC 1.jpg	Attachment	2/06/2019
freeway1.jpg	Attachment	2/06/2019
ABC Sample Summary Sheet.pdf	Attachment	2/06/2019

Drag additional attachments here or click to select files

**Action Buttons**

Request Total Loss Add Supplement Send Cancellation Request

**Action Buttons:** The action buttons allow the user to request a Total Loss Evaluation (if enabled), send a cancellation request, or add a supplement to the claim.

**Review Results:** The “Review Results” will appear when the Desk Review audit is complete. A link to the review file and the email of the reviewing auditor will also be shown.

**Add Attachments:** Any other attachments can be submitted using the additional attachments button shown above. Attachments will appear in the attachments list as soon as upload is complete.

**Other Details:** “Claim Details”, “Shop”, “Vehicle”, and “Owner” information are displayed on the card on the left side of the page. The claim number and status are shown on the title bar at the top.

# Desk Review Dashboard

The Desk Review Dashboard is available by clicking on the “Dashboard” link under “QCS Desk Review” in the Client Portal main menu. The Desk Review Dashboard shows an overview of the claims currently assigned to a logged-in user.

Dashboard Tabs

Search

Claim Number	Name	Vehicle	Last Updated	Status	Contact	Options
			1/28/2019 4:44 PM	Draft - new	Contact	Actions
	HARRY HENDERSON	corolla	1/28/2019 3:07 PM	Supplement In Review	Contact	Actions
TEST1-28-19-1	KEVIN KENNEDY	F250	1/28/2019 2:59 PM	In Review - new	Contact	Actions
TEST1-15-19-1	JAMES ONEAL	FOCUS	1/23/2019 4:39 PM	Supplement In Review	Contact	Actions
TEST1.22.19	MICHAEL BUTLER	SIERRA	1/22/2019 12:09 PM	In Review - new - cancellation pending	Contact	Actions
TEST1-17-192	UNK UNK	UNK	1/17/2019 1:48 PM	Total Loss Confirmed - new Total Loss	Contact	Actions
TEST1-17-19	TEST TEST	TEST	1/17/2019 9:27 AM	Draft - new	Contact	Actions
TEST1919	Albert Lowes	Something	1/16/2019 1:08 PM	In Review - new - cancellation pending	Contact	Actions
TEST1-16-19	HARRY HENDERSON	TUNDRA	1/16/2019 12:42 PM	Total Loss Possible Total Loss	Contact	Actions
TEST1-15-19-2	MICHAEL MATHEWS	F-150	1/15/2019 1:00 PM	In Review	Contact	Actions

Showing 61 to 70 of 71 entries

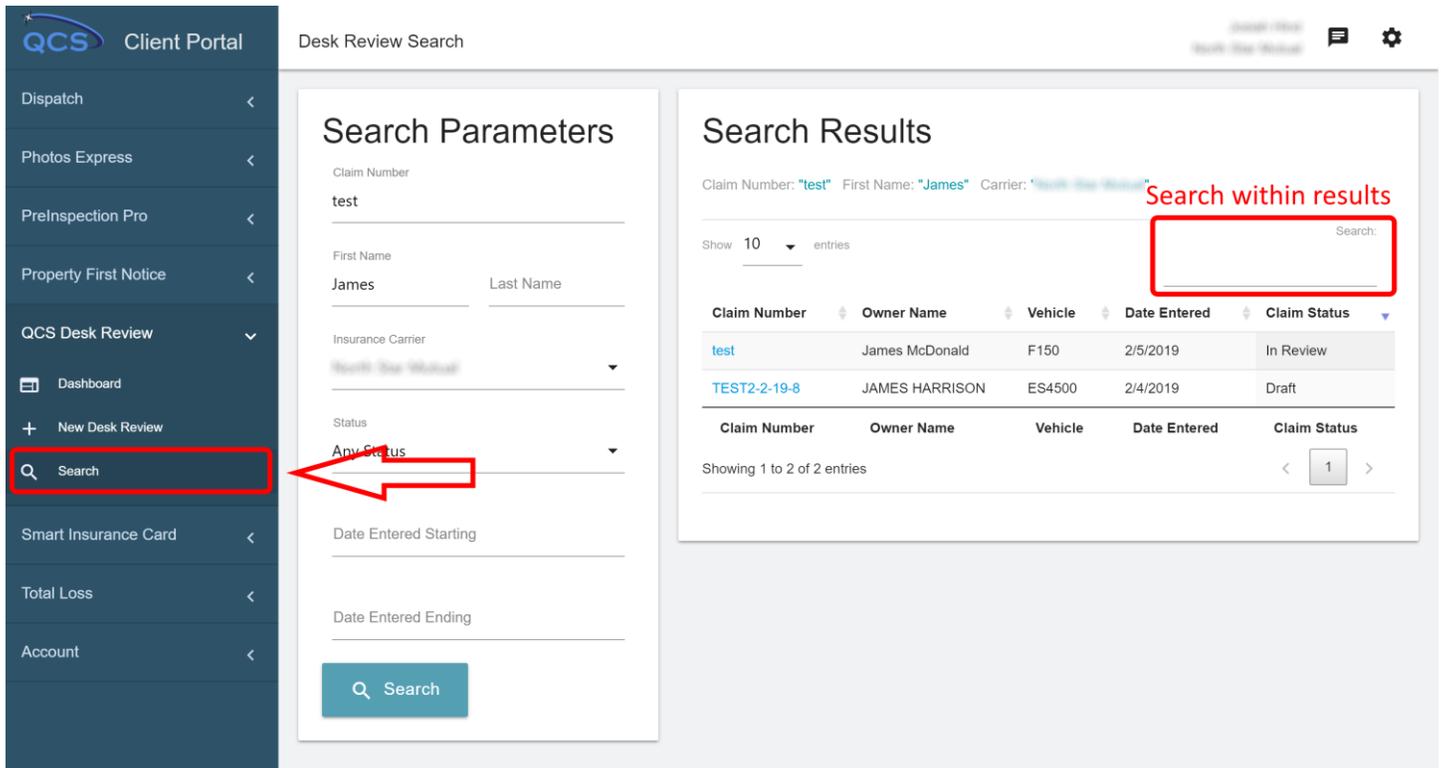
**Dashboard Tabs:** The “All Claims” tab on the Desk Review Dashboard shows all the open Desk Review assignments for the currently logged-in user. The “Review Completed” tab shows Desk Review assignments with a status of “Review Completed”, “Supplement Review Completed” or “Total Loss Confirmed”.

**Search:** A search box is available to search within all open claims, or search within completed claims, depending on the selected tab.

**Other:** The details page for any Desk Review Assignment is available by clicking on the assignment’s claim number or by clicking on “Details” in the “Actions” dropdown menu under the “Options” column. Other pertinent claim data is displayed in the main dashboard table as shown.

# Desk Review Search Page

The Desk Review Search Page is available by clicking on the “Search” link under “QCS Desk Review” in the Client Portal main menu. The Desk Review Search Page allows a user to search for any Desk Review assignment, past or present, active or cancelled, that is associated with the insurance carrier set to their account.



**Search Within A Carrier:** The Desk Review Search page allows a user to search for any Desk Review Assignment under the same insurance carrier that the user is registered with. For example, if a user is registered with “XY” insurance, then the search page allows the user to search for any claim associated with “XY”.

**Search Parameters:** Multiple search parameters are available, and an additional “Search” box is available above the search results table to allow the user to further refine their query.