

# OPTIS

(Order Prior To Inspection System)

## USER GUIDE



[www.insurance.carcogroup.com](http://www.insurance.carcogroup.com)

Another Innovation from the Leader in Physical Damage  
Pre-Insurance Inspections  
Proudly Serving the Insurance Industry since 1977.

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## **OPTIS Introduction**

### **What is OPTIS?**

OPTIS (Order Prior To Inspection System) is a web-based system created by CARCO that allows producers to submit inspection requests directly to CARCO via the internet. The inspection process is initiated by completing a web form that includes the insured's information as well as information about their vehicle. The producer's order is stored and matched when CARCO receives the completed inspection. Once the inspection is processed, the completed inspection is posted to the producer's account.

### **Why was OPTIS created?**

OPTIS was created to assist producers who prefer that a CARCO inspection site perform their vehicle inspections. CARCO affords the producer more time to service and sell additional business to their new and existing accounts, and provides a convenient service to their insureds.

### **Who can use OPTIS?**

The OPTIS system is available to all insurance agencies and carriers. Clients will have full access to submit inspection requests, track inspection status, and print or e-mail all state required inspection notification form.

### **What other features does OPTIS make available to Producers?**

The OPTIS website creates an environment to assist producers in many aspects of the inspection process. It affords the producer the ability to print all of the required Authorization, Confirmation, and Acknowledgement forms. In addition, OPTIS users have full access to the Retrievals/Web IRIS system, which delivers inspection data and allows you to view inspection images 24 hours a day. Producers can check the status of their inspection requests, and use the convenient links to our Site Locator to assist their insureds in locating a convenient CARCO site. Most importantly, producers can submit the initial inspection information to CARCO and retrieve all data regarding inspections that have been completed for their insureds.

## **Billing**

OPTIS clients (typically producers) are billed directly, instead of another entity (typically a carrier). Pre-insurance inspections ordered through the OPTIS system save producers valuable time, and the cost per completed inspection is minimal. As part of the set-up process, producers will be asked for a valid credit card, and only completed pre-insurance inspections will be billed to their credit card on a monthly basis.

## OPTIS FEATURES AND BENEFITS

- ✓ Open and maintain your own OPTIS account.
- ✓ An unlimited number of users can be added to your account, each of them with their own unique sign-on and password.
- ✓ Placing inspection orders is fast and easy.
- ✓ Confidential information is safe and secure on our web-based system.
- ✓ State required inspection initiation documents are pre-filled with the information you enter on the inspection order screen and are easy to print or e-mail to your insured.
- ✓ All OPTIS orders are tracked and viewable on the OPTIS website.
- ✓ Printable receipts are generated for all OPTIS orders you place.
- ✓ Once you enroll in OPTIS, you will receive e-mail notifications:
  - To confirm receipt of your orders
  - When inspections have been received and processed by CARCO
  - To notify you when we have not received an inspection for your insured 15 days and 30 days after you placed your OPTIS order.
  - When an update to your credit card information is needed.
- ✓ Access to your inspection data and images 24 hours a day, 7 days a week.
- ✓ Electronic billing statements.
- ✓ Web-based site locator enables you to view and print convenient CARCO sites for your insureds.

## FREQUENTLY ASKED QUESTIONS

**Q. How do I open an OPTIS account?**

A. You can enroll by going to the web-site: <http://www.optisdemo.carcogroup.com> or call our Customer Service Department at 1-800-969-2272 and select option 4.

**Q. What information will I be asked to provide to open an OPTIS account?**

A. There is a simple client information and credit card authorization form you will need to complete to establish your account. You will be asked to provide information about your agency, carriers you represent, states you write policies in, and credit card and billing information.

**Q. What type of internet browser do I need?**

A. Microsoft Internet Explorer (version 6 or higher) or Mozilla-Firefox (version 1.5 or higher). CARCO does **not** recommend access to our web pages using AOL or Netscape.

**Q. What type of support is available to me if I have questions about my account or need assistance?**

A. Our Customer Service Department is available to assist you from 8:00 a.m. to 8:00 p.m. Monday through Friday and from 9:00 a.m. to 5:00 p.m. on Saturday. You may also send you question(s) via e-mail to [OPTIS@carcogroup.com](mailto:OPTIS@carcogroup.com).

**Q. How do I add additional users?**

A. You can add or edit users with the User Admin function within OPTIS.

**Q. How will I reconcile the charge on my credit card with completed inspections?**

A. Each month you will receive an electronic statement, which will itemize each inspection.

**Q. How will I learn to use the OPTIS system?**

A. Once your account is established, you will receive an OPTIS User Guide that will walk you through placing orders, checking the status of inspections, retrieving inspections, as well as other functions of the system. The Customer Service Department is also available to answer any questions you may have.

# OPTIS ENROLLMENT PROCESS

In order to begin using OPTIS, you will need to register as a user by going to the web-site: <http://www.optisdemo.carcogroup.com> , and provide your business, contact, carrier representation and credit card information. Once all the information is entered, please select the **submit form** button on the bottom of the screen to complete the registration process.

CARCO Pre-Insurance Inspection System - Windows Internet Explorer

http://insuranceqa/?action=optis\_enroll&cmd=101

CARCO Pre-Insurance Inspection System

CARCO Pre-Insurance Inspection System user:

### OPTIS ENROLLMENT FORM

**SECTION A - BUSINESS INFORMATION**

Business Name:

Street Address:

Street Address 2:  (optional)

City:  State:  Zip Code:

Fax:  (optional)

**SECTION B - PRINCIPAL'S INFORMATION**

Principal's name:

Principal's E-Mail Address:

Principal's Phone#:  Ext.

**SECTION C - MAIN CONTACT**  --check here if different then principal

\*\*\*new verbiage goes here\*\*\*:

Name:

E-Mail Address:

Phone#:  Ext.

**SECTION D - INSPECTION NOTIFICATION**

Each individual who orders an inspection will receive an order confirmation and reminder notice after 15 and 30 days if the inspection has not been received by CARCO.

You will also receive a summary of all inspections processed by CARCO on a daily basis. This summary statement should be sent to the following individual:

Principal  Main  Other

**SECTION E - CARRIERS REPRESENTED**

Done

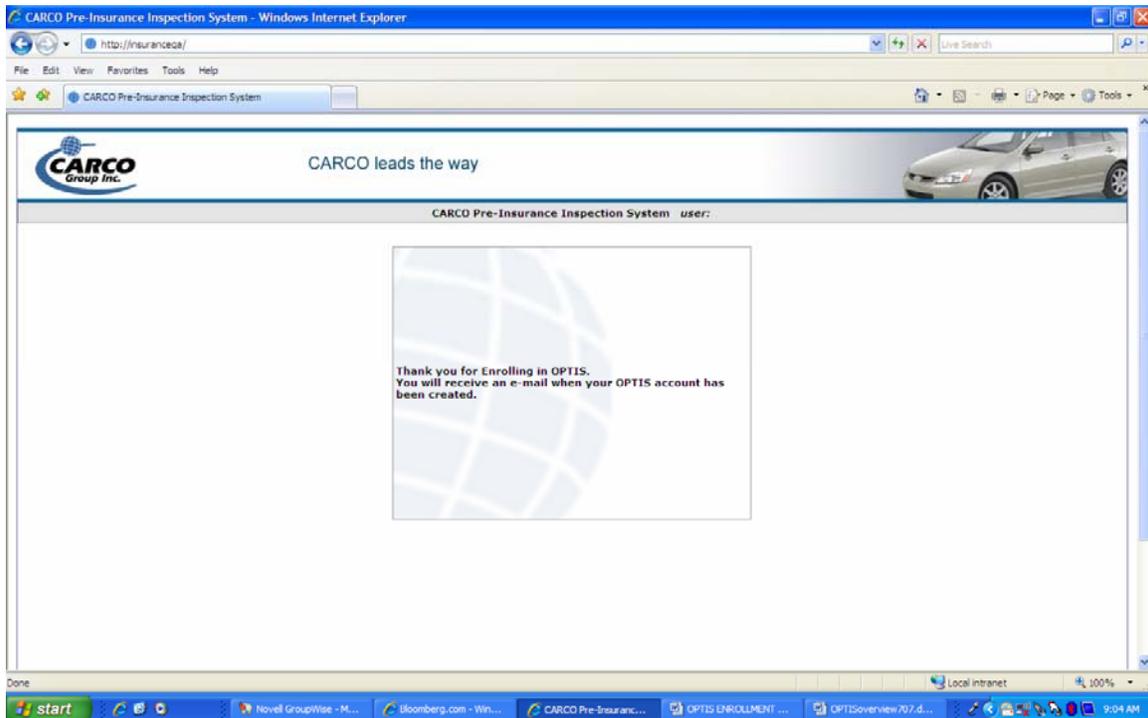
Local intranet 100%

start Novell GroupWise - M... Arba Sourcing - Wind... CARCO Pre-Insuranc...

8:39 AM

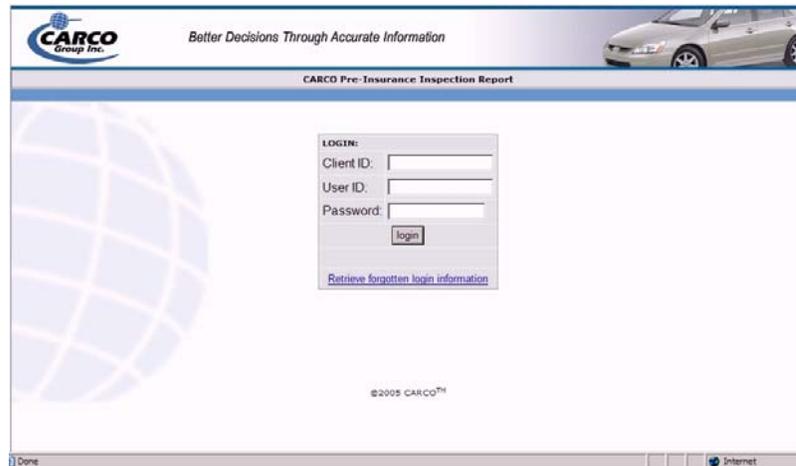
(COMPLETE SCREEN NOT SHOWN HERE)

Congratulations you have successfully registered as an OPTIS user! An e-mail will be sent in one business day with your account information.



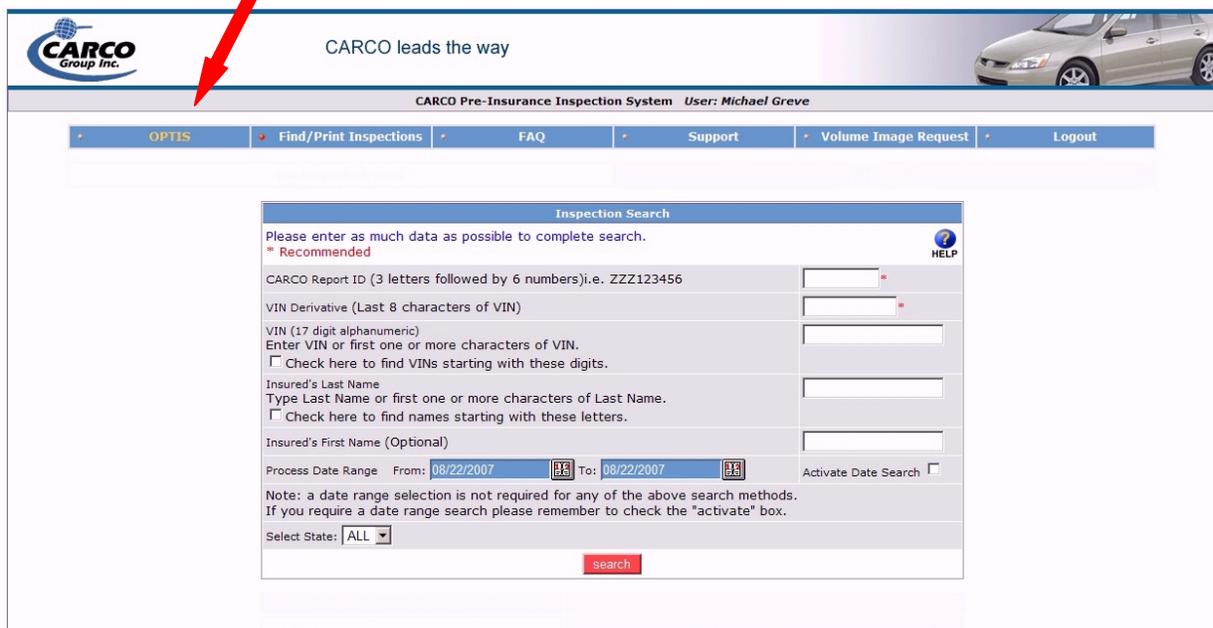
# Using the CARCO OPTIS system

Go to the website: [www.insurance.carcogroup.com](http://www.insurance.carcogroup.com) to enter your user information. You will be prompted to change your password.



The screenshot shows the CARCO Group Inc. logo and the slogan "Better Decisions Through Accurate Information". Below this is the title "CARCO Pre-Insurance Inspection Report". The main content area features a login form with the following fields: "Client ID:", "User ID:", and "Password:". A "login" button is positioned below the password field. A link for "Retrieve forgotten login information" is located below the login button. The page also includes a globe graphic on the left and a copyright notice "©2005 CARCO™" at the bottom center.

Select the OPTIS button on the menu bar to access the system



The screenshot displays the main interface of the CARCO Pre-Insurance Inspection System. At the top, the CARCO logo and slogan "CARCO leads the way" are visible. Below the header, the system title "CARCO Pre-Insurance Inspection System" and the user name "User: Michael Greve" are shown. A horizontal menu bar contains several options: "OPTIS", "Find/Print Inspections", "FAQ", "Support", "Volume Image Request", and "Logout". A red arrow points to the "OPTIS" button. Below the menu bar is an "Inspection Search" form. The form includes a "HELP" icon and a "Recommended" section. The search criteria fields are: "CARCO Report ID (3 letters followed by 6 numbers) i.e. ZZZ123456", "VIN Derivative (Last 8 characters of VIN)", "VIN (17 digit alphanumeric) Enter VIN or first one or more characters of VIN. Check here to find VINs starting with these digits.", "Insured's Last Name Type Last Name or first one or more characters of Last Name. Check here to find names starting with these letters.", and "Insured's First Name (Optional)". There is also a "Process Date Range" section with "From" and "To" date pickers (both set to 08/22/2007) and an "Activate Date Search" checkbox. A "Note" at the bottom of the form states: "a date range selection is not required for any of the above search methods. If you require a date range search please remember to check the 'activate' box." The "Select State" dropdown is set to "ALL". A red "search" button is located at the bottom of the form.

Please select the continue button to order the vehicle inspection.

CARCO Pre-Insurance Inspection Report - Windows Internet Explorer

http://insurance/?action=optis&page\_frame=iframe&cmd=4

File Edit View Favorites Tools Help

CARCO Pre-Insurance Inspection Report

**CARCO**  
Group Inc.

**Welcome to CARCO OPTIS**



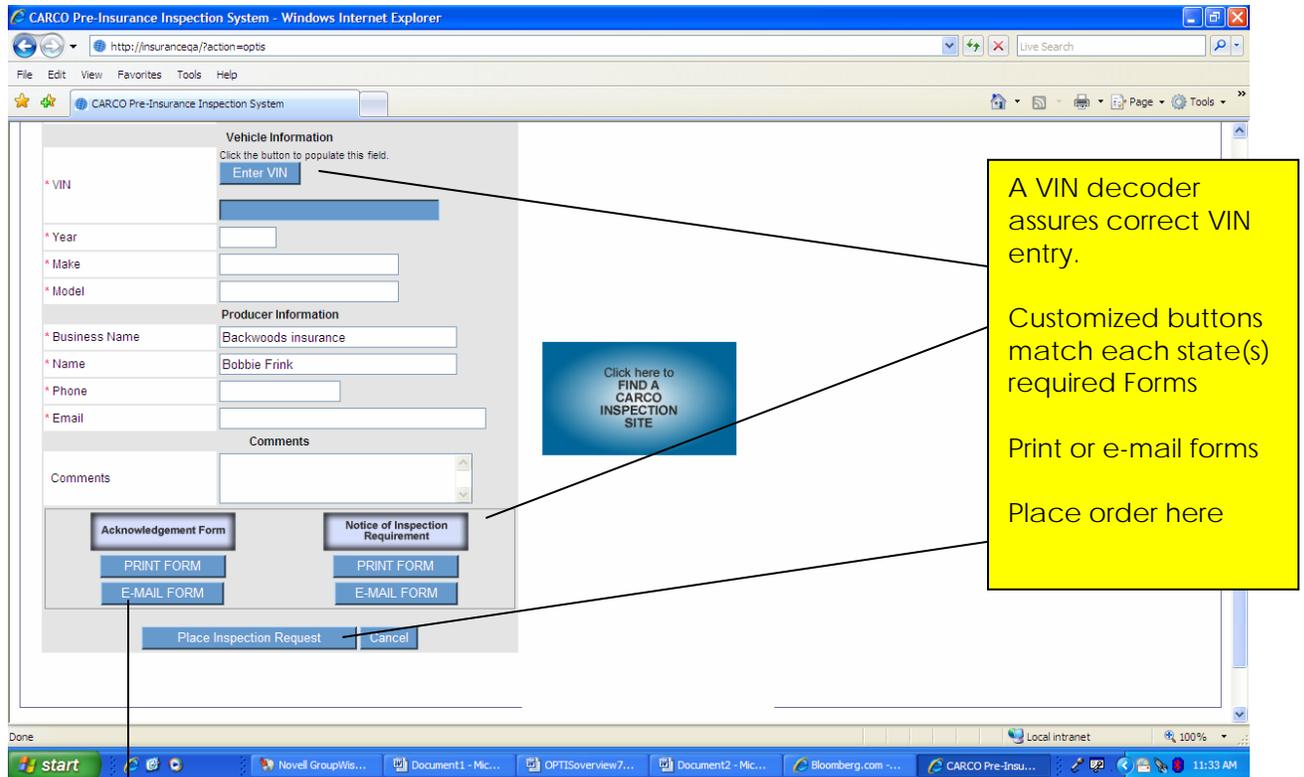
**The OPTIS (Order Prior To Inspection System) system allows you to initiate an inspection, print inspection initiation forms, and check inspection status directly with CARCO.**

Continue

Done Local intranet 100%

start Novell GroupWise - M... CARCO Pre-Insuranc... Document1 - Microsof... OPTISoverview707.d... 10:57 AM

By completing the order form, you also have the option to PRINT or e-mail a state required notification form. Then, click the "Place Inspection Request" button to place an order.



You have the option to PRINT or E-MAIL the required form.

When the print option is selected a new window opens allowing you to **save** or **open** the form to print. The **e-mail** option will send the completed form as an attachment via your local e-mail application.

The screenshot shows a window titled 'NY\_ACK\_120021[1].pdf - Adobe Reader'. The form content is as follows:

**NEW YORK**

**Acknowledgement Form**

**ACKNOWLEDGEMENT OF REQUIREMENT FOR PHOTO INSPECTION**  
(This is NOT a safety inspection)

Name of Insured Or Applicant: Geralds, James

Address: 2 Allfield Way  
Seldon NY 11792

Effective date of Coverage: 08/03/2007  
(Date)

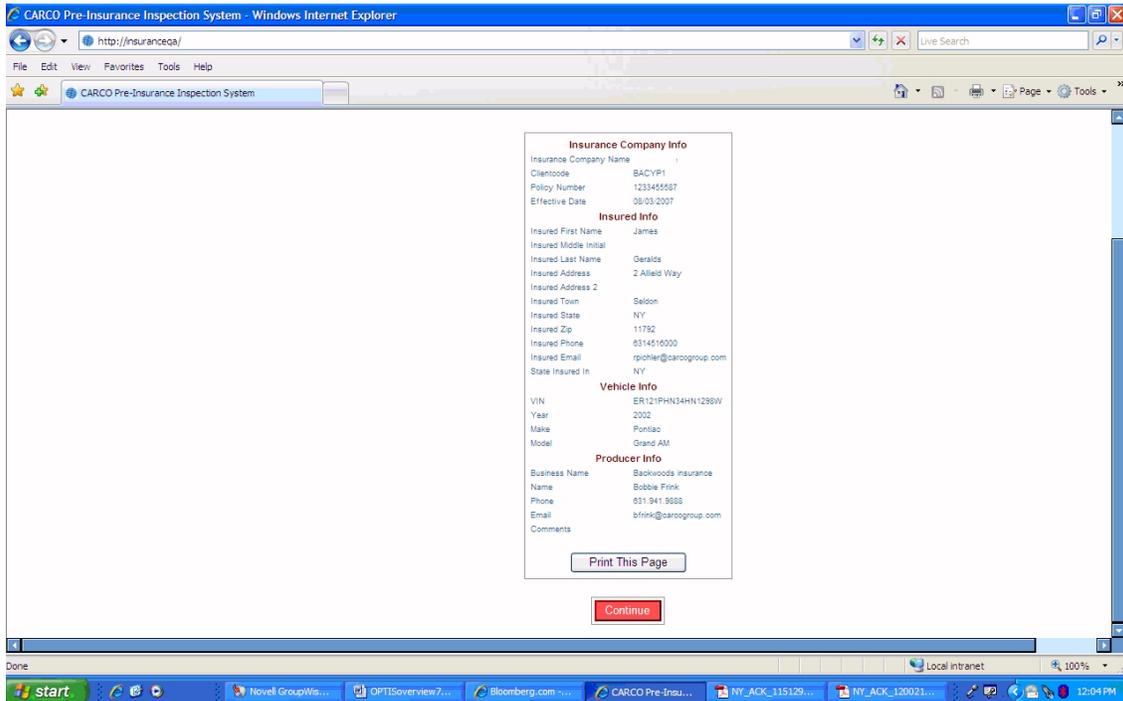
Inspection shall be Completed by: 08/08/2007  
(Date: Not more than 5 days after the effective date of coverage)

VEHICLE TO BE INSPECTED:

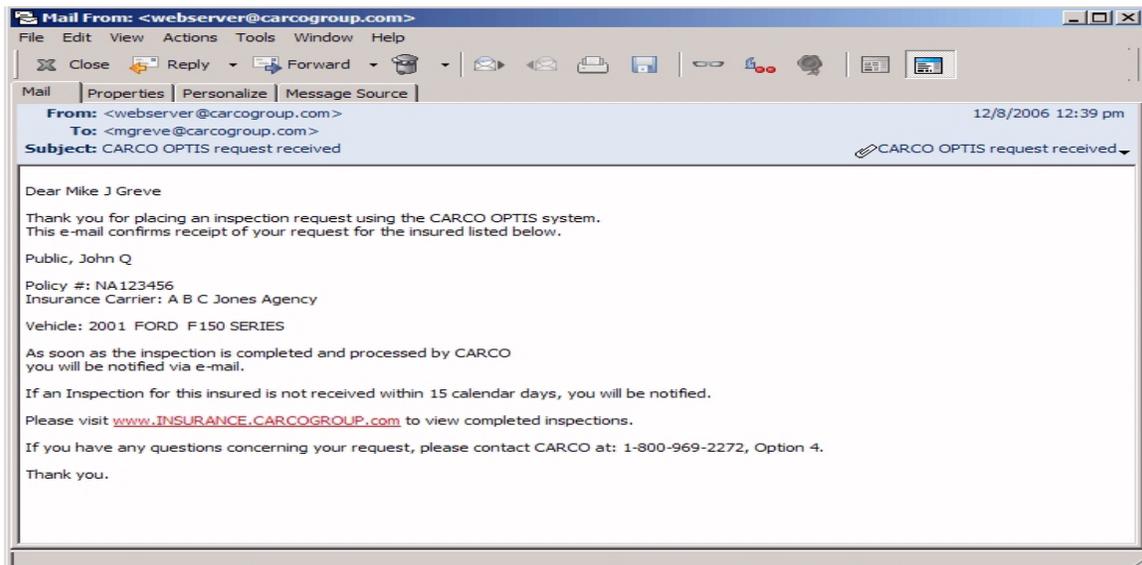
1. 2002, Pontiac, Grand AM

(Complete Form Not Shown Here)

When the "Place Inspection Request" button is clicked, the order confirmation page is displayed. You can print this page as a "Receipt" for your order, or just hit "Continue" to return to the OPTIS order page.



A confirmation will be sent to the e-mail address supplied.



# ORDER HISTORY SCREEN

Check the status of inspections you have requested by selecting the "Order History" option. Completed inspections can be viewed from within OPTIS and you can also cancel inspection orders that you no longer need to track.

The screenshot shows the CARCO Pre-Insurance Inspection System web application. The main window has a navigation bar with tabs for Search, OPTIS, FAQ, Support, ImageDelivery, and Logout. Below this is a sub-tab for Order History and User Administration. A secondary window titled "OPTIS Order History" is open, displaying filter options and a table of inspection orders.

Filter Options: Show Pending, prev 60 days, 06/02/2007 - 08/01/2007

Request Date	Policy Number	Insurance Company	Status
ORDER DATE: 08/01/2007	POLICY: 1233455587	INS COMPANY:	STATUS: E
<input type="button" value="Cancel"/>	VIN: ER121PHN24HN1289W VINMAKE: PONTIAC VINMODEL: GRAND AM VINYEAR: 2002	INSURED: GERALDS, JAMES INSURED ADDR: 2 ALLIED WAY SELDON, NY 11792 8314518000 RPICHLER@CARCOGROUP.COM	EXP DATE COMPL DATE: /0/0

# INSPECTION DATA AND IMAGES

By clicking on the SEARCH tab you will be brought from the OPTIS page to the main web search screen. This is where you can view inspection data and inspection images.

Please note: This page can also be accessed directly after initial sign-on to our website.

## SEARCH SECTION

This section is used to search for individual inspections.

You only need to fill in **one** field for a valid search

1. CARCO Report Number (if available)
2. VIN Derivative (last 8 characters)
3. VIN (Full 17 digits). Use wildcard checkbox  to find VIN's starting with specified digits.
4. Insured's Last Name. Use wildcard checkbox  to find last names starting with specified characters.
5. First Name. Add a first name in the box provided to narrow your search.
6. Date Range. Select an inspection date range, and make sure to check the ACTIVATE box before hitting search. You can also further narrow your date range search by selecting a specific state.

CARCO Group Inc. CARCO leads the way

CARCO Pre-Insurance Inspection System User: Michael Greve

OPTIS Find/Print Inspections FAQ Support Volume Image Request Logout

**Inspection Search**

Please enter as much data as possible to complete search. [HELP](#)

\* Recommended

CARCO Report ID (3 letters followed by 6 numbers); i.e. ZZZ123456

VIN Derivative (Last 8 characters of VIN)

VIN (17 digit alphanumeric)  
Enter VIN or first one or more characters of VIN.  
 Check here to find VINs starting with these digits.

Insured's Last Name  
Type Last Name or first one or more characters of Last Name.  
 Check here to find names starting with these letters.

Insured's First Name (Optional)

Process Date Range From: 08/22/2007 To: 08/22/2007 Activate Date Search

Note: a date range selection is not required for any of the above search methods.  
If you require a date range search please remember to check the "activate" box.

Select State: ALL

search

# WEB IRIS SECTION

This section allows you to download all inspection data for inspections processed by CARCO. Clients usually download daily to see which inspections were processed by CARCO the day before.

## 1. DATE RANGE - Date inspections were processed at CARCO

- ◆ Last date range selected is always remembered, as a reminder.
- ◆ Typical client usually searches by yesterday's date. (Remember to include Friday, Saturday, and Sunday dates for a Monday, as CARCO processes inspections seven days a week).

## 2. STATE and CLIENT CODE

- ◆ Choose your specific STATE or choose ALL
- ◆ Choose specific CLIENT CODE or choose ALL
- ◆ For multiple selections in a drop down box, hold down the CTRL key & select entry.

## 3. REPORT SELECTION (all reports produced are based on date range specified)

- ◆ **EXCEL SPREADSHEET** – Printable Excel spreadsheet with inspection detail.
- ◆ **DETAIL REPORT** – PDF formatted report containing inspection detail, in a line item style layout. Report detail contains - Name, Policy #, VIN, Report #, Inspection date, Damage, Alert, Anti-theft codes, Odometer, # of photos (if any) and Year, Make, Model of vehicle.
- ◆ **ONE PER PAGE REPORT** - PDF formatted report containing same inspection detail as above (detail report), but in a one inspection per page layout.

The screenshot shows the CARCO WEB IRIS interface. On the left, there is a table with columns: Report Range/Type, #Rec, Remove, and View. The table contains several rows of data, including report ranges like '07/01/05-07/05/05' and counts like '144'. On the right, there is a header with the CARCO logo and 'WEB IRIS'. Below the header, it says 'The last date range you selected was: From 07/01/2005 To 07/05/2005'. There are date range selectors for 'From' and 'To' with 'dd/mm' labels. Below that, there is a 'Select State:' dropdown menu set to 'ALL' and a 'Select ClientCode:' dropdown menu set to 'ALL'. At the bottom, there are buttons for 'EXCEL', 'Detail Report', 'OnePerPage', 'Damage', 'Alerts', and 'AntiTheft'.

Report Range/Type	#Rec	Remove	View
07/01/05-07/05/05 - EXCEL Sitestate:FL	144		
07/01/05-07/05/05 - Detail Sitestate:ALL	3074		
07/01/05-07/12/05 - EXCEL Sitestate:ALL	11174		
07/01/05-07/01/05 - Detail Sitestate:ALL	1254		
07/01/05-07/01/05 - Detail Sitestate:FL	32		
07/01/05-07/01/05 - Detail Sitestate:ALL	1254		
07/01/05-07/05/05 - EXCEL Sitestate:ALL	3074		

4. DOWNLOAD STATUS SECTION – This area, to the left of the date range section, displays a current status of any downloads you have requested.

Downloads are normally completed within seconds. However clients with a high number of inspections may have to wait several minutes.

These processing reports are available to view, print, and download for one day, and are purged from our system each night. This section displays:

- ◆ **REPORT TYPE** – Displays the name of the report requested, the date range selected, and the specific state chosen or ALL states.
- ◆ **#REC** – Displays the number of inspection records the request contains.
- ◆ **REMOVE** – Click this icon to delete a report.
- ◆ **VIEW** – Click on this icon to view a report.

## CARCO Contact Information

- Main website address: [www.carcogroup.com](http://www.carcogroup.com)
- OPTIS web page: [www.insurance.carcogroup.com](http://www.insurance.carcogroup.com)
- Site locator web page: [www.carcosites.com](http://www.carcosites.com)
- Tele-Site Phone # (a site locator) 1-888-242-1200
- Customer Service Phone #: 1-800-969-2272, option 4
- Customer Service E-Mail Address: [inspections@carcogroup.com](mailto:inspections@carcogroup.com)
- Customer Service Fax#: 631-862-7438 or 1-888-270-3535
- OPTIS/Marketing E-Mail Address: [OPTIS@carcogroup.com](mailto:OPTIS@carcogroup.com)

