

Who PAYS?
for WHAT?

Body

2018

BODY LABOR OPERATIONS



Take the
next survey!
see pg 2

There are **four different** annual surveys in the "Who Pays for What?" series.

This report contains the results of the survey on body operations conducted in April of 2018.



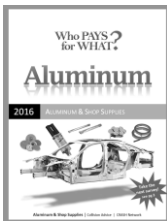
Completed in April 2018

Body Labor Operations



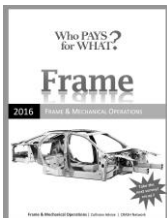
Completed in January 2018

Refinish Related Operations



Next survey coming in October 2018

Aluminum Repair & Shop Supplies



Next survey coming in July 2018

Frame & Mechanical Operations

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To sign up to participate in future surveys visit www.crashnetwork.com/collisionadvice

Get past survey results

To obtain results from prior surveys, visit www.crashnetwork.com/collisionadvice

SPONSOR

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Who conducted this survey?

CollisionAdvice (www.CollisionAdvice.com) is an independent training and consulting firm featuring some of the most respected and experienced experts in the collision repair industry. Mike Anderson and his team offer real-world, cutting-edge training and guidance both in the classroom and one-on-one in the shop.

CRASH Network (www.CrashNetwork.com) is the most independent source of collision repair industry news, research and information not available anywhere else. It offers subscribers a quick-to-read weekly summary of key information and perspectives by the most experienced editorial staff in the industry. [See what we do.](#)

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INTRODUCTION

A letter from Mike Anderson

When we first started these surveys in 2015, we could never have imagined the incredible response we would get from our participants as to the value of the surveys. This spring the surveys were even recognized with an [Industry Service award from the Society of Collision Repair Specialists](#)! And participation continues to grow. This quarter's survey, our 13th in the Who Pays series, had the second-highest participation level ever, with over 1,000 responses!



While we know it takes time for you to take the surveys, we truly appreciate your taking the time. I love bringing this information to the industry, and I can only do that thanks to you taking some time each quarter to complete the survey. Together we can and will continue to make a difference!

As always, I believe the information we are supplying through our "Who Pays for What?" survey series is truly helping the industry, in large part by showing you, despite what you may be told, that you are not "the only one" doing and charging for the nearly 100 "not-included" procedures we cover throughout the year.

Our goal is to help shops become aware of the not-included operations they are doing, and understand how often other shops are being compensated for them.

Please continue to participate in these surveys, and please encourage other shops to do so. The more participation we have, the more accurate the results.

As always, we are open to any suggestions or input you may have about the surveys or the results. Thanks again for supporting this effort to improve our industry.

Mike Anderson
President, Collision Advice
www.CollisionAdvice.com

P.S. These surveys have proven so popular in the U.S. that we have launched "Who Pays for What Canada?" this quarter. More information is available at www.crashnetwork.com/whopayscanada

74%
of shops say they use these survey results as a regular reminder of "not-included" procedures, and to train their staff about "not-included" procedures they may be doing and should be charging for.



How to participate in future surveys

To participate in upcoming surveys, or to receive notification when new survey findings become available, sign up at www.CrashNetwork.com/CollisionAdvice. You only have to do this one time. Once you have participated in a survey, it is not necessary to sign up again.

Our next survey

The next survey will open in July of 2018. It will cover "not included" frame and mechanical related repair operations.

INTRODUCTION

Purpose and methodology

In 2015, Collision Advice and *CRASH Network* launched this new series of surveys to help repair facilities better understand how their billing practices differ from other repair facilities, including whether other shops are being paid for procedures their shop may be doing but for which it is not being compensated.

This survey, which ran from April 1 to April 30, 2018, asked body shops nationwide to report how often they are paid for 21 different body repair operations by the eight largest auto insurers. The other surveys in the series examine procedures related to aluminum repair, frame/mechanical operations, and refinish related procedures.

The online survey was open to all autobody repair facilities, and was promoted through the trade press as well as direct invitations to more than 19,000 individuals in the industry. Each individual physical shop location could submit one response to the survey.

Respondents were in no way compensated for their participation.

For each of the repair operations in the survey, repair facilities were asked how often each of the insurers reimbursed the shop for that operation when it was necessary for a repair. Response choices were: "always," "most of the time," "some of the time," "never," or "never asked to be paid for this."

Shops were also asked which, if any, of the insurers' direct repair programs they participate in.

Respondents

The survey received responses from 1,026 collision repair facilities who responded to some - or in most cases, all - of the question sets. Shops of all types (see shop type table) and from all 50 states (see table on following page) participated in the survey. A regional breakdown is provided for each repair procedure based on the following 11 regions.

Shop Type	Respondents
Independent	640
Dealership	194
Multi-shop	150
Franchise	42



Region	Respondents
Great Lakes	222
Mid-Atlantic	88
Midwest	138
Mountain	39
New England	65
Non-Contiguous	25
Northeast	111
Pacific Northwest	49
South	111
South Central	102
Southwest	76

Margin of error

Assuming a nationwide repair facility population of approximately 40,100 (based on 2015 U.S. Census Bureau and National Automotive Dealers Association data) the survey results have an approximate margin of error of +/- 3.5% with a 95% confidence level on questions involving 750 respondents. This means that, if 29% of respondents overall said they are paid "always" or "most of the time" for a procedure, we can say with 95% confidence that between 25.5% and 32.5% of facilities are actually paid "always" or "most of the time" for that procedure.

Keep in mind, the margin of error will increase to a varying degree due to smaller sample sizes and population size changes in the result breakdowns - including regional breakdowns and DRP vs. non-DRP comparisons.

INTRODUCTION

How to read the survey results

50 state participation

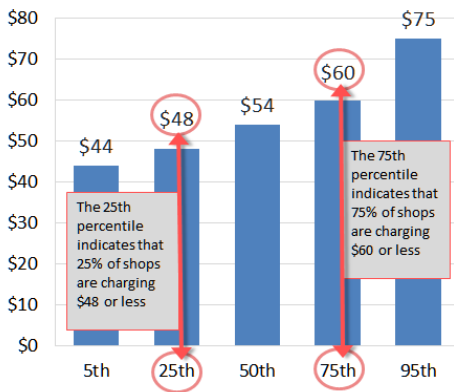
Survey results may be presented in several ways: response tables, ranking charts, and percentile breakdowns. The following should guide your interpretation of the results.

Overall response tables: Response tables show the percentage of all facilities selecting "always," "most of the time," and "never." These columns do not include those who said they "never asked" and should be interpreted those facilities that do negotiate for this procedure, this percent are paid at this frequency." The "never ask reports the percentage of total respondents who said they never negotiated for this procedure.

Payment frequency comparison charts: These charts present results using a composite rank system that can be used to visually compare categories relative to the others. The rank shows each result on a scale from 0 to 3, where the higher the score, the more frequently that category is paid. The scores were calculated by valuing each "always" response as 3 points, each "most of the time" response as 2, each "some of the time" as 1, and "never" responses were valued at 0. The resulting average of these scores becomes the "rank" for that category. Those respondents who said they "never asked" to be paid for a procedure are not included in rank calculations.

By State	
AK	15
AL	11
AR	18
AZ	8
CA	62
CO	13
CT	12
DC	0
DE	4
FL	23
GA	25
HI	10
IA	30
ID	10
IL	58
IN	33
KS	13
KY	8
LA	13
MA	30
MD	22
ME	4
MI	50
MN	34
MO	28
MS	9
MT	13
NC	27
ND	3
NE	22
NH	10
NJ	23
NM	2
NV	6
NY	48
OH	21
OK	14
OR	23
PA	36
RI	6
SC	30
SD	8
TN	13
TX	68
UT	10
VA	16
VT	3
WA	16
WI	60
WV	2
WY	3

SAMPLE RATES



Percentiles: Because it can be agreed that the specific rates that shops charge for their services fall within a range, this report expresses some rate results in percentiles, rather than a simple "average" rate. Each percentile group represents the amount that the specified percentage of respondents falls below. For example, if a result shows \$60 under the 75th percentile, that means that 75 percent of respondents charge less than \$60, and another 25 percent charge more than \$60 for that item. Likewise, if \$60 is found under the 25th percentile, that means that 25 percent of all shops charge less than \$60, and 75 percent charge more.

Speedometer: At the top of each repair procedure section you will see a "speedometer" graph along with an arrow. The speedometer shows the percentage of shops who are paid for the procedure "most" or "all" of the time. The arrow shows the percentage change from a similar survey last year.



Keeping in mind our 3.5% margin of error, only changes that exceed 3.5% should be viewed as substantial change. Such changes could be attributed to several factors, including changes in shop or insurer practices, but also a change in the make-up of shops participating in the survey. More than 1-in-4 of this year's respondents (25.4%) also participated in last year's survey, giving credence to the idea that at least some of the changes could well be attributed to changing practices within the shops, rather than other factors.

Key findings

It is clear from the results of these surveys that whether or not a repair facility is reimbursed for a particular item depends, to a certain degree, on whether or not the shop negotiates for it. Though this can vary by insurance company, DRP status, or region of the country, it is clear that while **none of the procedures in this survey are universally paid by insurers, none are universally rejected by insurers either.** There are many examples in this survey series where nearly 3 out of 4 shops report getting paid most, if not all, of the time for a certain procedure, yet another 20 percent of shops say they never even attempted to charge for it.

Comments and suggestions

We invite your feedback. Please feel free to email info@crashnetwork.com with any comments, questions, concerns or suggestions.

HOW TO USE THE SURVEY RESULTS

Shop estimators and staff should review this report to identify which of the procedures the shop is performing on some or all jobs. Then consider which if any of those items the shop wants to include on estimates and invoices when appropriate. Maybe you'll want to start with those items most frequently being paid by insurers; check out the rate-of-payment 'speedometer' at the top of each two-page repair operation summary, or the [overall rankings](#) near the end of the report.



Next, prepare your staff to negotiate for these items, perhaps choosing two or three to focus on each quarter. I recommend four questions you can use when negotiating for any of these items:

1. Is it required to return the vehicle back to pre-accident condition?

How do you document that it's required? Check out the OEM repair procedures, either through the automaker websites directly, or through third-party services such as ALLDATA, AudaExplore TechFocus, CCC Repair Methods, or Mitchell TechAdvisor. Get the appropriate bulletins from your paint manufacturer. Other manufacturers of materials or equipment offer bulletins detailing the need for some of these procedures. Scanning the vehicle can provide documentation of the need for some operations.

2. Is it included in any other labor operation?

No estimator should be without a copy of the estimating guides (often referred to as "P-pages") for all the estimating systems. You can download them from the "Estimate Toolbox" section on the DEG website. That website is also a place to submit an inquiry to one of the estimating system providers to confirm whether a procedure is included or not-included. The associations also offer free tools to help as well; the Automotive Service Association (ASA) regularly updates what it calls "Not-Included Operations" charts and the Society of Collision Repair Specialists (SCRS) offers a 24-page "Guide to Complete Repair Planning."

3. Are there pre-determined times?

Again, the estimating systems or the DEG are your best sources to determine whether a pre-determined time has been established for a not-included procedure.

4. What is it worth?

I can't tell you what to charge. You have to figure out what your labor is going to be and any materials you're going to use. But the time you charge should reflect how long it takes the average technician to gather up their tools, equipment and supplies and perform the task in a safe and proper manner, and then return their tools and equipment.

If it's a procedure done frequently in your shop, set up some time studies to determine an appropriate charge. Use an invoicing system for materials or supplies. Check for OEM warranty labor times or those listed in third-party services such as ALLDATA or TechAdvisor.

The four negotiating questions can apply for just about any line item on your estimate. Arm your estimators with the tools and resources needed to answer those four questions and you can be among the shops successfully being paid for many of the procedures in this survey.

Be sure to check out the "[Resources](#)" listed at the end of this report for some other sources of help for successfully understanding and negotiating the procedures.

-Mike Anderson

STICK TO THE FACTS

1. Is it required?	2. Is it included?	3. Are there pre-determined times?	4. If not, what is it worth?
OEM repair procedures or bulletins	Estimating systems	Estimating systems	Time study
Paint manufacturer bulletins	ASA Not-Included charts	DEG website	Print an invoice
Material manufacturer bulletins (Würth, 3M, etc.)	SCRS Guide to Complete Repair Planning		Equipment manufacturer bulletins
Scan tools	estimatescrubber.com		OEM warranty times
The vehicle	DEG website		
	"Who Pays for What?" survey	"Who Pays for What?" survey	"Who Pays for What?" survey

DATABASE ENHANCEMENT GATEWAY

NEW IN THIS REPORT! – Links to the Database Enhancement Gateway (DEG)

The Database Enhancement Gateway (DEG) is a free tool available to the industry to help improve the accuracy and completeness of the estimating databases. Anyone can submit an inquiry to the DEG in order to:

- Have missing parts added to one of the estimating databases
- Have missing labor times added to a database
- Challenge the accuracy of a labor time
- Get confirmation as to whether something is not-included

Starting with this “Who Pays for What?” report, the DEG will be providing a list of inquiries related to each repair procedure in the survey as a potential resource for repairers when negotiating for "not-included" repair operations..

Many of the inquiries, while sometimes involving more than just a single "not-included" operation, will contain a question about whether or not the specific procedure is "included" or "not-included" and why. The questions are addressed by the specific information providers (AudaExplore, CCC, and Motor) showing when and why an operation is not-included in the published labor times.

In this report, if the DEG has uncovered inquiries related to a specific procedure, you will find a list of them at the bottom of each procedure section in this report in a table similar to the following:



DEG Tracking #	Information Provider	Inquiry Details
11687	CCC	Link to DEG inquiry result
8581	AudaExplore	Link to DEG inquiry result
616	AudaExplore	Link to DEG inquiry result

Clicking on the link for a procedure will bring you directly to the inquiry report on the DEG website where you can read the full explanation by the information provider involved. In the example below, AudaExplore (Audatex) explains clearly that "if a portion of the inner surface is refinished in a different color, [this] would be a manual entry for the masking and second color mixing steps."

Submission Information

Tracking #: 8581	Date Submitted: 10/11/2015	Status: Resolved (IP Change)
------------------	----------------------------	------------------------------

Inquiry Resolution

IP Explanation

The Audatex replacement refinish allowance accounts for painting the interior surface of the door in its entirety. However if a portion of the inner surface is refinished in a different color, this color change would be addressed as a manual entry for the masking and second color mixing steps. The application time is included in the Audatex interior refinish allowance for the door.

DEG links will bring you directly to the full explanation given by the information provider.

REPAIR PROCEDURE DEFINITIONS

The following 21 repair operations were included in this survey. Participants were asked, for each insurer, how often they charge for/are paid to complete each procedure when it is necessary for a repair.

Repair operation	Description
Protect vehicle interior/components during repair	Labor to use masking, welding blankets, bubble-wrap, etc., to prevent sparks, dust, etc. from entering/damaging the interior or other parts of the vehicle.
Airbag residue clean-up	Labor to remove powder residue inside vehicle following airbag deployment.
Broken glass clean-up	Labor to remove broken glass, including labor when seats, dash or other parts must be removed and reinstalled as part of the clean-up.
Clean-up old urethane	Additional labor to remove or level old urethane adhesive residue following removal of glass.
Labor to gain collision access	Labor to cut into a door or hood, for example, in order to open it as needed to complete damage assessment or repairs.
Remove molding/emblem/decals adhesive from vehicle	Labor (not included in molding/emblem installation time) to remove old adhesive residue from the vehicle.
Repair adjacent panels	Repair damage caused by drilling, grinding, etc. to remove an adjacent damaged panel. Example: repair trunk floor or quarter panel after removing rear body panel.
Clean and re-tape molding	Labor to remove tape/adhesive from molding and apply new tape adhesive prior to reuse.
Replace vapor barrier	Labor to R&I or replace vapor barriers as necessary, particularly on vehicles with airbag pressure sensors inside doors.
Additional labor to install non-OEM parts	Test-fitting or other labor needed to ensure fit of non-OEM crash parts.
Additional labor to clean-up used / salvage parts	Labor to wash or degrease a used part prior to use.

REPAIR PROCEDURE DEFINITIONS

Repair operation	Description
Inspect seat belts	Labor to review condition of seat belts as per OEM requirements/recommendations.
Duplication of OEM texture when applying seam-sealer	Additional labor to match appearance/texture of seam-sealer.
Additional labor to R+R+I components on used/salvage assemblies	Labor to remove, for example, the door handle from both the vehicle being repaired and the salvage assembly, then install the door handle on the replacement salvage assembly.
Labor for application of weld-thru primer	Labor only - not materials.
Remove tar, grease or petroleum-based products	Additional labor to remove tar, grease or petroleum-based products that would interfere with the repair or replacement process of welded-on panels.
Remove sound-deadening material	Labor to remove damaged sound-deadening material from a damaged component that is to be repaired.
Install sound-deadening material	Labor to install sound-deadening material.
Rust-proofing	Labor to apply cavity wax or body wax inside of enclosed areas (such as rails) following repair or replacement to seal the inside.
MITCHELL USERS ONLY Application of seam-sealer on welded-on panels	Labor to apply seam-sealer on new welded-on parts that are not shipped with it from the factory. (Mitchell says this is a not-included operation)
CCC and AUDAEXPLORE USERS ONLY Application of seam-sealer on bolted-on panels	Labor to apply seam-sealer on new bolted-on parts that are not shipped with it from the factory. (CCC and AudaExplore say this is NOT included.)

REPAIR OPERATIONS

Protect vehicle interior/components during repair

Of those that negotiate for this overall, 48% are paid "always" or "most of the time."



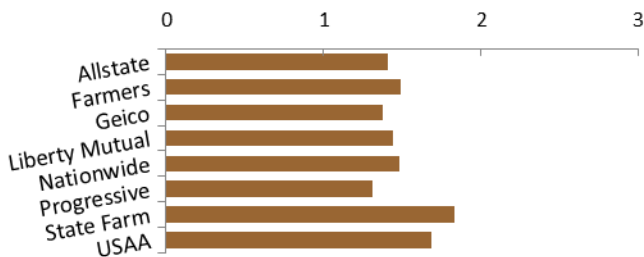
Procedure description: Labor to use masking, welding blankets, bubble-wrap, etc., to prevent sparks, dust, etc. from entering/damaging the interior or other parts of the vehicle.

Responses by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	23.2%	21.3%	29.4%	26.1%	23.6%	836
Farmers	26.2%	20.5%	29.0%	24.2%	26.9%	740
Geico	23.0%	20.1%	28.3%	28.5%	24.4%	821
Liberty Mutual	23.4%	20.1%	33.4%	23.1%	24.8%	761
Nationwide	23.2%	22.7%	33.1%	21.0%	25.9%	750
Progressive	20.2%	19.2%	31.5%	29.0%	23.8%	832
State Farm	38.2%	22.7%	23.0%	16.1%	22.3%	885
USAA	31.2%	24.0%	27.5%	17.2%	24.3%	797

Protect vehicle interior/components - 2018

Insurance company payment frequency comparison

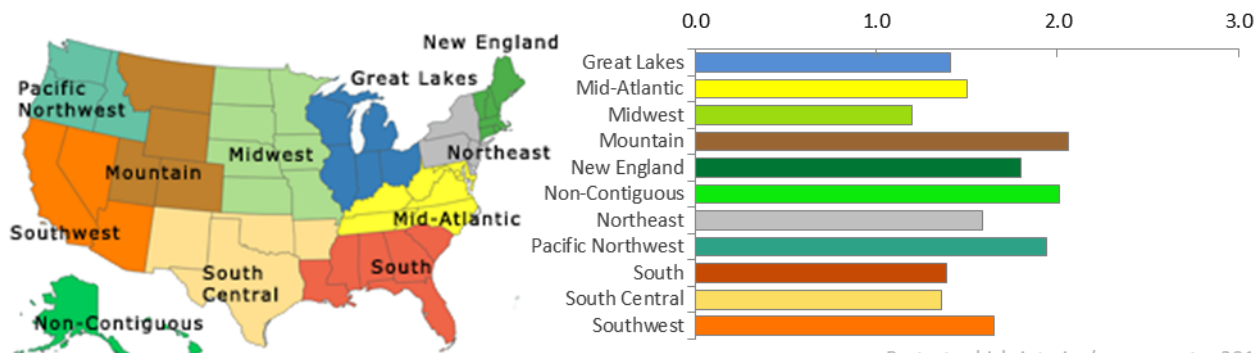


Protect vehicle interior/components - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Responses by Region



Protect vehicle interior/components - 2018

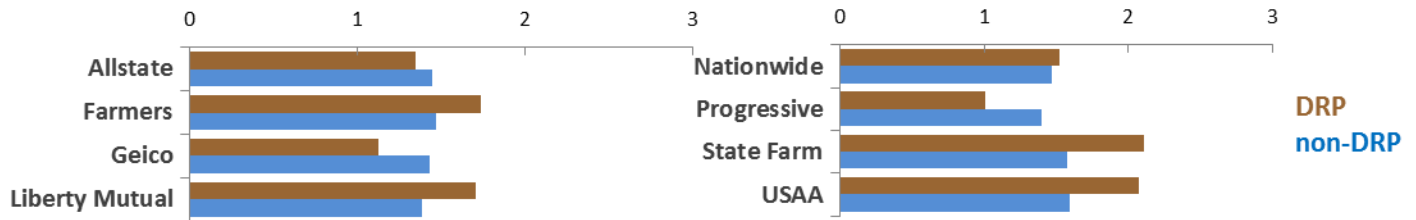
Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	21.9%	24.7%	25.7%	27.7%	22.5%	1394
Mid-Atlantic	27.9%	16.7%	33.3%	22.1%	22.7%	543
Midwest	17.1%	19.0%	31.1%	32.8%	32.7%	914
Mountain	49.6%	19.4%	18.6%	12.4%	48.2%	249
New England	31.6%	29.1%	26.7%	12.6%	19.5%	354
Non-Contiguous	44.0%	24.8%	19.2%	12.0%	12.0%	142
Northeast	24.5%	26.8%	31.5%	17.2%	19.6%	659
Pacific Northwest	42.7%	18.4%	29.2%	9.7%	17.5%	349
South	23.4%	17.6%	33.3%	25.8%	16.9%	705
South Central	25.3%	15.0%	29.6%	30.1%	30.9%	635
Southwest	30.0%	22.1%	31.1%	16.8%	25.3%	478

Protect vehicle interior/components - 2018

Protect vehicle interior/components during repair

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



Protect vehicle interior/components - 2018

DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	19.1%	25.5%	26.6%	28.7%	22.3%	121
Farmers	35.3%	21.6%	24.5%	18.6%	20.9%	129
Geico	23.3%	13.3%	16.7%	46.7%	23.1%	78
Liberty Mutual	34.2%	19.2%	30.0%	16.7%	21.1%	152
Nationwide	25.9%	20.3%	33.6%	20.3%	20.1%	179
Progressive	11.5%	17.7%	31.3%	39.6%	23.8%	126
State Farm	52.2%	19.4%	16.1%	12.4%	21.3%	380
USAA	46.1%	22.7%	23.4%	7.8%	22.0%	164
Non-DRP						
Allstate	24.8%	21.4%	28.1%	25.7%	24.0%	609
Farmers	25.6%	20.4%	29.7%	24.3%	29.0%	517
Geico	23.4%	21.7%	29.3%	25.7%	24.8%	632
Liberty Mutual	21.6%	19.5%	35.1%	23.9%	25.4%	516
Nationwide	22.2%	24.3%	32.2%	21.3%	28.2%	476
Progressive	23.0%	20.4%	29.8%	26.8%	25.0%	596
State Farm	25.3%	26.3%	29.4%	19.0%	25.1%	386
USAA	26.6%	24.9%	28.9%	19.6%	25.5%	534

Protect vehicle interior/components - 2018

The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
10435	CCC	Link to DEG inquiry result
7851	CCC	Link to DEG inquiry result

Airbag residue clean-up

Of those that negotiate for this overall, 36% are paid "always" or "most of the time."



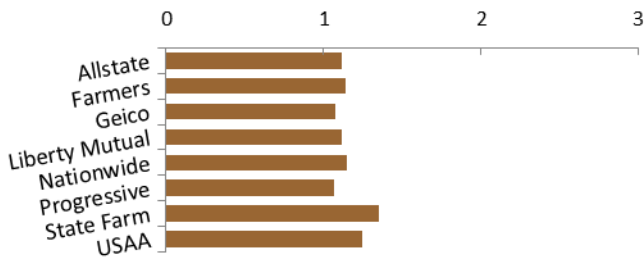
Procedure description: Labor to remove powder residue inside vehicle following airbag deployment.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	21.0%	13.1%	22.6%	43.3%	62.1%	805
Farmers	21.4%	14.5%	21.4%	42.8%	62.3%	733
Geico	20.7%	12.0%	22.0%	45.3%	61.3%	798
Liberty Mutual	20.6%	13.9%	22.3%	43.2%	61.5%	746
Nationwide	20.8%	15.1%	22.6%	41.6%	61.8%	731
Progressive	20.0%	12.5%	22.0%	45.6%	61.9%	801
State Farm	28.5%	14.4%	20.7%	36.3%	60.9%	852
USAA	24.2%	15.6%	21.9%	38.4%	61.0%	774

Cleanup Airbag Residue - 2018

Insurance company payment frequency comparison

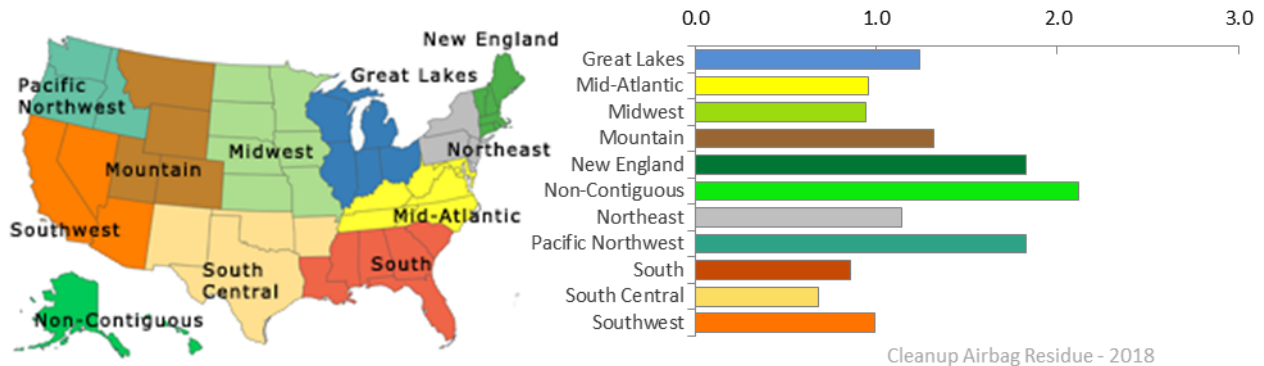


Cleanup Airbag Residue - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



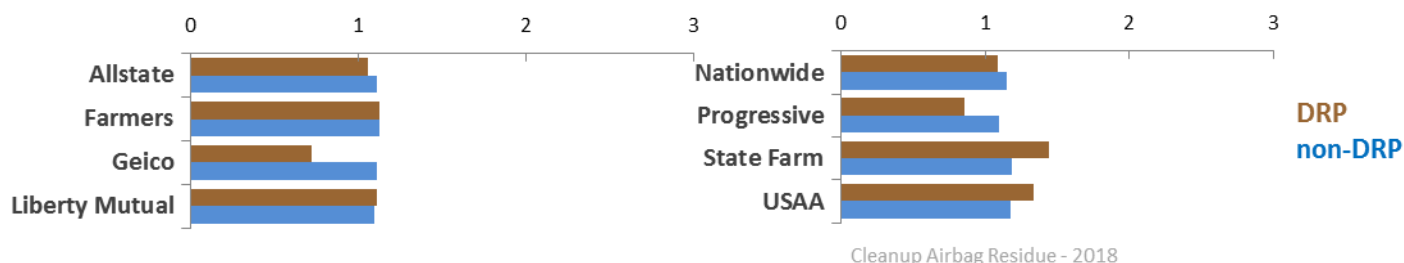
Cleanup Airbag Residue - 2018

Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	24.5%	14.9%	20.3%	40.3%	60.5%	1344
Mid-Atlantic	25.8%	4.5%	9.6%	60.1%	67.2%	542
Midwest	15.3%	11.3%	25.5%	47.9%	60.5%	894
Mountain	17.9%	21.4%	35.7%	25.0%	77.1%	245
New England	36.4%	29.5%	14.8%	19.3%	48.2%	340
Non-Contiguous	50.0%	16.7%	28.3%	5.0%	55.2%	134
Northeast	19.5%	14.1%	27.4%	39.0%	56.2%	632
Pacific Northwest	44.8%	18.2%	11.9%	25.2%	56.1%	326
South	18.1%	5.2%	21.6%	55.1%	58.9%	698
South Central	12.8%	7.9%	13.4%	65.9%	73.5%	618
Southwest	4.7%	22.2%	40.9%	32.2%	63.4%	467

Cleanup Airbag Residue - 2018

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	21.3%	8.5%	25.5%	44.7%	59.5%	116
Farmers	22.9%	6.3%	31.3%	39.6%	61.3%	124
Geico	13.8%	10.3%	10.3%	65.5%	61.8%	76
Liberty Mutual	20.4%	11.1%	27.8%	40.7%	63.8%	149
Nationwide	26.2%	4.6%	21.5%	47.7%	62.0%	171
Progressive	16.3%	9.3%	18.6%	55.8%	63.6%	118
State Farm	36.0%	8.8%	18.4%	36.8%	63.1%	369
USAA	31.1%	6.6%	27.9%	34.4%	61.9%	160
Non-DRP						
Allstate	21.4%	13.2%	20.9%	44.5%	62.7%	590
Farmers	21.8%	14.5%	18.7%	45.1%	62.8%	519
Geico	21.5%	11.4%	23.2%	43.9%	61.6%	617
Liberty Mutual	20.9%	13.3%	20.4%	45.4%	61.4%	508
Nationwide	19.8%	15.8%	23.7%	40.7%	62.4%	471
Progressive	21.3%	11.8%	22.6%	44.3%	62.0%	581
State Farm	22.5%	14.6%	22.5%	40.4%	59.5%	373
USAA	20.9%	17.9%	19.4%	41.8%	61.3%	520

Cleanup Airbag Residue - 2018

The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
	AudaExplore	Refer to Audatex Database Reference Manual
	CCC	Refer to CCC Guide to Estimating
	Mitchell	Refer to Mitchell Collision Estimating Guide

Broken glass clean-up

Of those that negotiate for this overall, 86% are paid "always" or "most of the time."



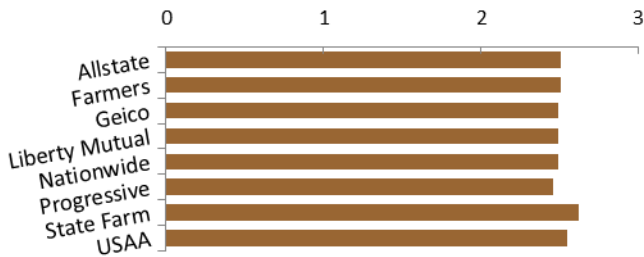
Procedure description: Labor to remove broken glass, including labor when seats, dash or other parts must be removed and reinstalled as part of the clean-up.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	67.2%	18.4%	12.5%	1.9%	2.3%	825
Farmers	67.4%	17.9%	12.6%	2.1%	2.9%	747
Geico	66.8%	18.5%	12.0%	2.6%	2.1%	815
Liberty Mutual	66.6%	18.3%	12.3%	2.8%	2.5%	758
Nationwide	66.3%	19.7%	11.3%	2.8%	2.8%	747
Progressive	65.4%	18.1%	13.1%	3.3%	1.9%	823
State Farm	73.8%	16.0%	9.0%	1.3%	1.8%	874
USAA	69.2%	18.7%	10.4%	1.7%	2.4%	796

Broken Glass Cleanup - 2018

Insurance company payment frequency comparison

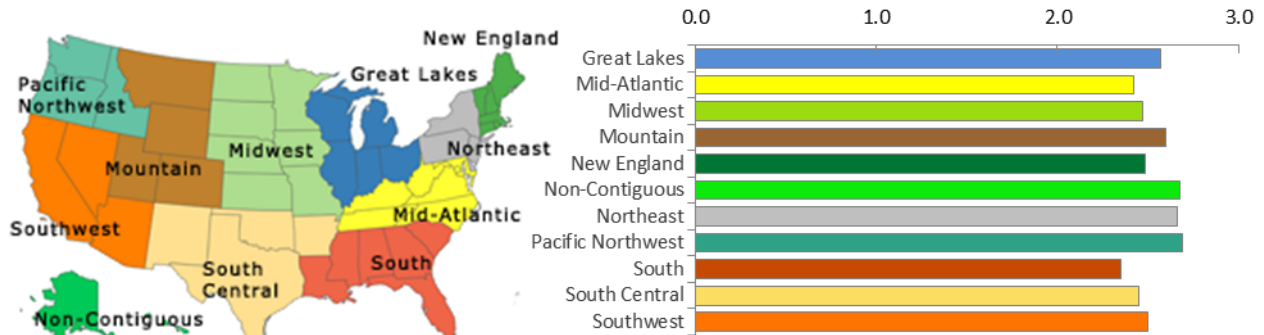


Broken Glass Cleanup - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



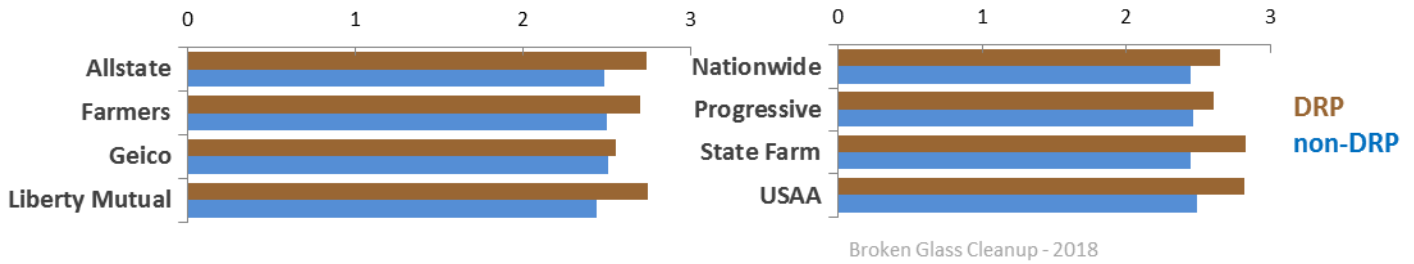
Broken Glass Cleanup - 2018

Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	69.1%	21.1%	7.7%	2.1%	1.7%	1384
Mid-Atlantic	61.5%	21.0%	15.5%	2.1%	1.7%	533
Midwest	66.3%	16.9%	14.8%	2.1%	6.4%	919
Mountain	75.1%	12.0%	10.8%	2.1%	3.2%	249
New England	66.7%	17.4%	14.0%	2.0%	0.0%	351
Non-Contiguous	78.4%	12.2%	7.9%	1.4%	1.4%	141
Northeast	77.3%	14.6%	4.7%	3.3%	1.4%	644
Pacific Northwest	76.5%	16.3%	6.9%	0.3%	0.0%	349
South	59.5%	19.7%	17.0%	3.8%	1.7%	699
South Central	65.0%	16.0%	17.8%	1.1%	4.2%	639
Southwest	66.0%	21.0%	9.6%	3.4%	0.0%	477

Broken Glass Cleanup - 2018

Responses by DRP Status


This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	80.8%	13.3%	5.0%	0.8%	0.0%	120
Farmers	77.7%	16.2%	4.6%	1.5%	0.0%	130
Geico	70.5%	15.4%	14.1%	0.0%	0.0%	78
Liberty Mutual	81.3%	12.7%	5.3%	0.7%	0.7%	151
Nationwide	76.9%	13.3%	8.1%	1.7%	2.3%	177
Progressive	75.8%	11.3%	11.3%	1.6%	0.0%	124
State Farm	87.7%	8.5%	3.2%	0.5%	0.5%	377
USAA	86.7%	9.1%	3.6%	0.6%	0.0%	165
Non-DRP						
Allstate	65.8%	19.1%	13.0%	2.1%	2.8%	602
Farmers	66.7%	18.0%	13.5%	1.8%	3.4%	523
Geico	67.8%	18.5%	10.9%	2.8%	2.4%	630
Liberty Mutual	64.0%	19.5%	13.3%	3.2%	2.5%	516
Nationwide	63.5%	21.4%	11.9%	3.2%	2.9%	477
Progressive	64.9%	19.4%	12.5%	3.3%	2.5%	593
State Farm	62.7%	21.4%	13.7%	2.1%	3.1%	385
USAA	64.2%	22.4%	11.8%	1.5%	2.8%	532

Broken Glass Cleanup - 2018

Notes from Mike



It is important to remember that clean-up of broken glass may require the removal of seats, the dash, door trim panels, etc. All of this is a not-included operation and should be itemized appropriately.

The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Information Provider	Inquiry Details
970	CCC	Link to DEG inquiry result
12093	Mitchell	Link to DEG inquiry result

Clean-up old urethane

Of those that negotiate for this overall, 37% are paid "always" or "most of the time."



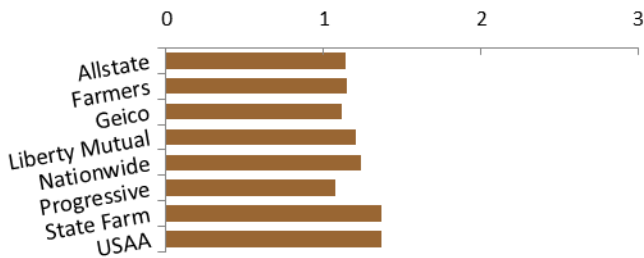
Procedure description: Additional labor to remove or level old urethane adhesive residue following removal of glass.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	18.9%	16.6%	24.5%	40.0%	56.1%	809
Farmers	19.2%	16.2%	25.3%	39.3%	58.3%	738
Geico	19.2%	13.8%	26.6%	40.4%	56.3%	798
Liberty Mutual	22.4%	14.0%	26.2%	37.4%	56.8%	743
Nationwide	21.2%	16.1%	28.0%	34.7%	57.5%	732
Progressive	18.0%	14.4%	24.8%	42.8%	56.1%	808
State Farm	26.8%	16.1%	24.4%	32.7%	56.5%	857
USAA	25.7%	17.1%	25.4%	31.9%	56.4%	778

Remove Old Urethane - 2018

Insurance company payment frequency comparison

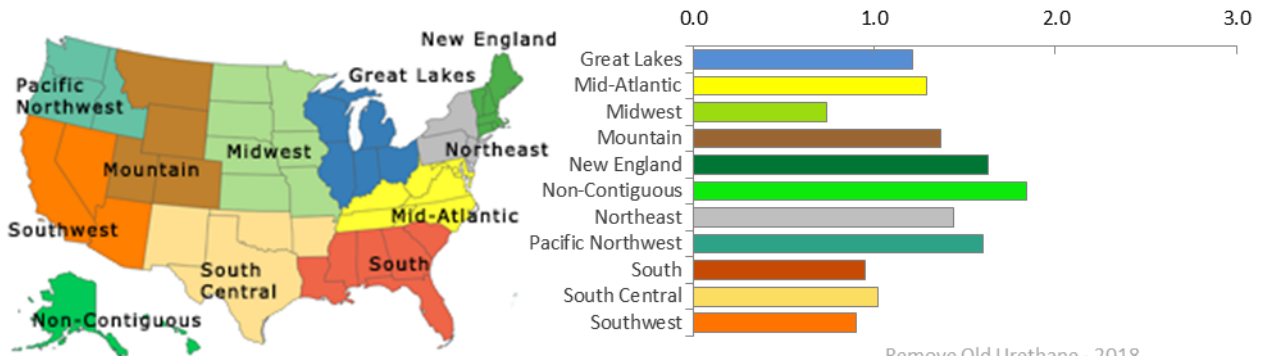


Remove Old Urethane - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



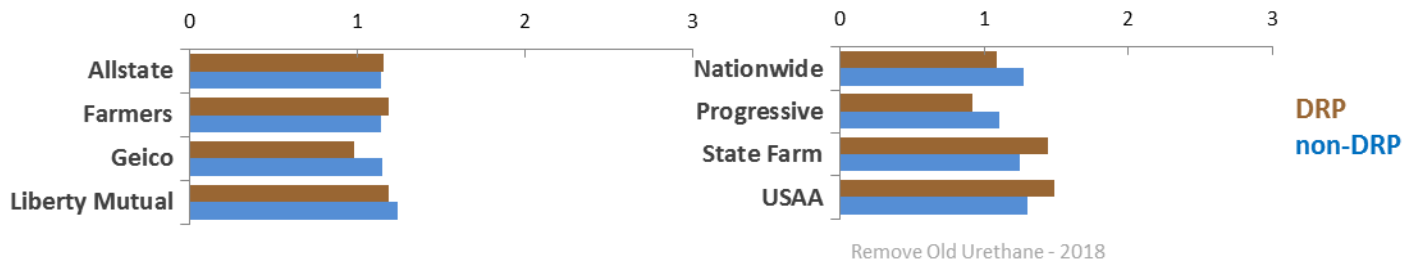
Remove Old Urethane - 2018

Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	20.9%	16.9%	24.7%	37.5%	59.9%	1370
Mid-Atlantic	23.3%	19.0%	21.6%	36.2%	55.5%	521
Midwest	15.0%	5.9%	17.7%	61.4%	72.4%	921
Mountain	24.8%	15.6%	31.2%	28.4%	56.2%	249
New England	31.7%	17.8%	32.2%	18.3%	41.4%	345
Non-Contiguous	47.0%	10.8%	21.7%	20.5%	39.4%	137
Northeast	25.1%	23.0%	23.0%	28.9%	47.4%	645
Pacific Northwest	35.0%	11.7%	31.3%	22.1%	50.0%	326
South	13.6%	13.3%	27.4%	45.8%	47.1%	697
South Central	17.7%	14.2%	20.8%	47.3%	62.9%	609
Southwest	7.1%	15.8%	37.5%	39.7%	58.5%	443

Remove Old Urethane - 2018

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	18.4%	18.4%	24.5%	38.8%	58.1%	117
Farmers	23.4%	17.0%	14.9%	44.7%	63.0%	127
Geico	20.0%	7.5%	22.5%	50.0%	47.4%	76
Liberty Mutual	21.9%	12.5%	28.1%	37.5%	56.8%	148
Nationwide	16.2%	11.8%	36.8%	35.3%	61.1%	175
Progressive	21.6%	3.9%	19.6%	54.9%	58.2%	122
State Farm	33.5%	12.0%	19.6%	34.8%	57.3%	370
USAA	34.7%	8.0%	29.3%	28.0%	53.4%	161
Non-DRP						
Allstate	20.4%	14.2%	24.2%	41.2%	56.1%	592
Farmers	19.4%	14.0%	27.9%	38.7%	57.3%	520
Geico	20.1%	14.3%	25.9%	39.8%	58.0%	617
Liberty Mutual	24.9%	12.0%	25.3%	37.8%	57.2%	507
Nationwide	24.1%	15.3%	24.1%	36.5%	56.3%	465
Progressive	18.4%	16.1%	23.9%	41.6%	56.1%	581
State Farm	20.9%	17.8%	26.4%	35.0%	56.5%	375
USAA	23.3%	18.4%	23.8%	34.5%	57.2%	521

Remove Old Urethane - 2018

The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
2883	AudaExplore	Link to DEG inquiry result
11007	CCC	Link to DEG inquiry result

Labor to gain collision access

Of those that negotiate for this overall, 54% are paid "always" or "most of the time."



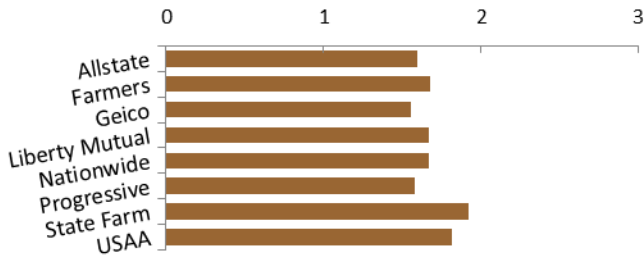
Procedure description: Labor to cut into a door or hood, for example, in order to open it as needed to complete damage assessment or repairs.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	28.3%	22.0%	30.7%	18.9%	24.0%	771
Farmers	30.3%	23.3%	30.1%	16.3%	27.4%	691
Geico	27.8%	20.5%	31.3%	20.3%	24.4%	755
Liberty Mutual	29.8%	24.1%	29.2%	16.9%	24.8%	706
Nationwide	29.0%	24.4%	30.9%	15.7%	25.9%	698
Progressive	27.9%	20.7%	32.4%	19.0%	24.2%	765
State Farm	39.3%	24.4%	24.8%	11.5%	22.6%	811
USAA	35.5%	24.7%	26.5%	13.3%	24.8%	742

Labor to Gain Access - 2018

Insurance company payment frequency comparison

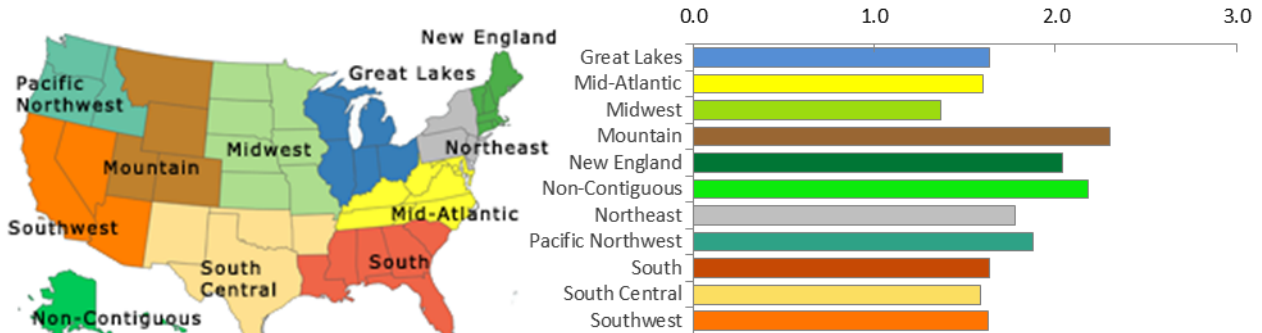


Labor to Gain Access - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



Labor to Gain Access - 2018

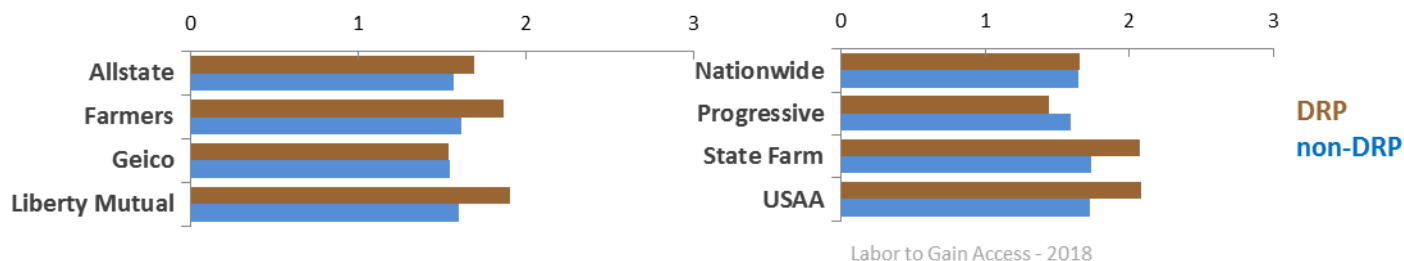
Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	29.6%	25.7%	23.9%	20.8%	29.3%	1298
Mid-Atlantic	27.4%	18.5%	40.2%	13.9%	25.8%	496
Midwest	20.0%	20.6%	35.6%	23.8%	27.7%	859
Mountain	58.5%	17.6%	19.5%	4.4%	26.7%	217
New England	39.3%	33.1%	19.3%	8.2%	7.6%	330
Non-Contiguous	49.0%	27.1%	16.7%	7.3%	23.2%	125
Northeast	28.3%	31.2%	30.4%	10.1%	9.7%	611
Pacific Northwest	39.7%	19.7%	29.7%	11.0%	14.2%	338
South	35.7%	10.3%	36.3%	17.7%	27.4%	653
South Central	29.1%	21.1%	29.6%	20.1%	30.8%	581
Southwest	27.1%	27.1%	27.1%	18.8%	33.2%	431

Labor to Gain Access - 2018

Labor to gain collision access

Responses by DRP Status


This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	33.3%	17.2%	34.4%	15.1%	21.2%	118
Farmers	40.4%	19.2%	27.3%	13.1%	22.7%	128
Geico	29.5%	16.4%	32.8%	21.3%	20.8%	77
Liberty Mutual	41.5%	21.1%	24.4%	13.0%	16.9%	148
Nationwide	30.9%	21.6%	30.2%	17.3%	21.5%	177
Progressive	26.6%	14.9%	34.0%	24.5%	23.6%	123
State Farm	48.0%	19.8%	23.8%	8.4%	20.7%	376
USAA	45.7%	23.3%	24.0%	7.0%	20.9%	163
Non-DRP						
Allstate	27.2%	22.3%	30.3%	20.1%	24.2%	596
Farmers	27.8%	23.5%	31.4%	17.3%	28.2%	515
Geico	27.5%	20.7%	31.1%	20.7%	24.6%	622
Liberty Mutual	26.7%	24.3%	30.7%	18.2%	26.8%	511
Nationwide	27.6%	25.6%	31.1%	15.7%	27.1%	472
Progressive	27.9%	21.8%	31.5%	18.7%	24.1%	585
State Farm	30.2%	28.4%	26.3%	15.1%	24.2%	376
USAA	31.5%	25.1%	27.7%	15.6%	25.9%	526

Labor to Gain Access - 2018

Notes from Mike



It is very surprising to me that, in most regions, 25 percent of shops have not sought to be paid for this. It has been my experience that it is not uncommon for a collision technician to need to cut an access hole to remove components from a damaged door, for example, or to get the latch open when the hood is damaged.

The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
12043	AudaExplore	Link to DEG inquiry result
12043	CCC	Link to DEG inquiry result
12043	Mitchell	Link to DEG inquiry result

Repair adjacent panels

Of those that negotiate for this overall, 65% are paid "always" or "most of the time."



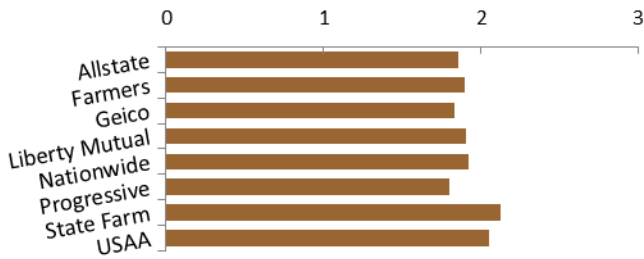
Procedure description: Repair damage caused by drilling, grinding, etc. to remove an adjacent damaged panel. Example: repair trunk floor or quarter panel after removing rear body panel.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	34.7%	28.5%	25.3%	11.5%	11.2%	766
Farmers	36.0%	28.5%	25.3%	10.2%	13.6%	691
Geico	33.7%	28.2%	25.8%	12.3%	11.6%	751
Liberty Mutual	36.5%	27.8%	25.6%	10.1%	12.5%	704
Nationwide	36.0%	28.9%	26.0%	9.1%	13.3%	698
Progressive	32.6%	26.7%	28.6%	12.1%	11.3%	761
State Farm	47.1%	25.8%	20.1%	7.0%	11.3%	808
USAA	42.5%	28.4%	20.4%	8.6%	11.9%	739

Repair Adjacent Panels - 2018

Insurance company payment frequency comparison

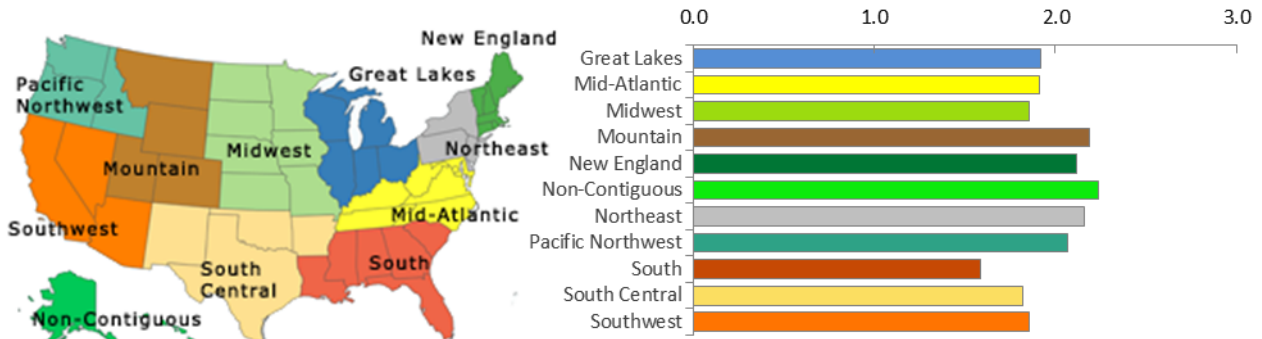


Repair Adjacent Panels - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



Repair Adjacent Panels - 2018

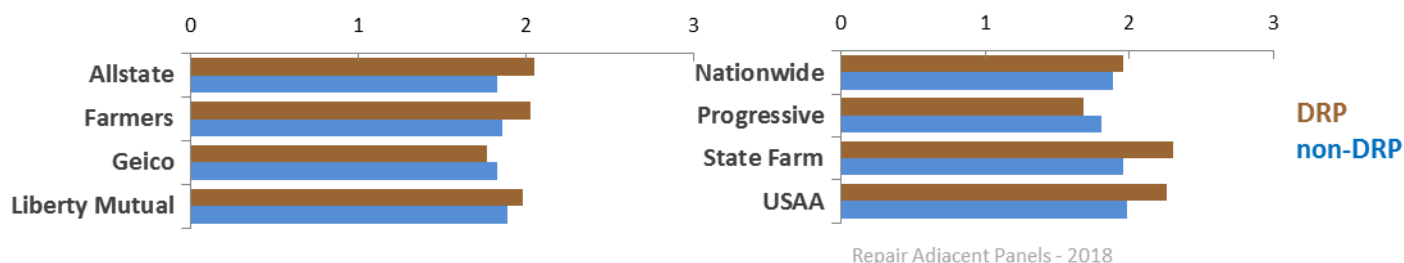
Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	38.2%	26.9%	23.7%	11.2%	10.5%	1289
Mid-Atlantic	39.9%	24.4%	22.9%	12.8%	15.2%	479
Midwest	31.5%	31.5%	28.3%	8.8%	24.4%	870
Mountain	50.0%	20.8%	27.5%	1.7%	18.3%	218
New England	37.5%	41.3%	16.7%	4.5%	5.7%	331
Non-Contiguous	61.2%	9.5%	21.6%	7.8%	4.1%	121
Northeast	44.1%	34.2%	15.4%	6.3%	3.1%	622
Pacific Northwest	46.1%	24.5%	20.0%	9.4%	8.0%	337
South	25.8%	23.5%	34.0%	16.6%	11.4%	638
South Central	35.5%	25.2%	25.6%	13.7%	11.6%	587
Southwest	33.1%	27.9%	31.5%	7.6%	9.9%	426

Repair Adjacent Panels - 2018

Repair adjacent panels

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.




DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	43.5%	26.9%	20.4%	9.3%	8.5%	118
Farmers	42.2%	25.0%	25.9%	6.9%	9.4%	128
Geico	30.4%	29.0%	27.5%	13.0%	9.2%	76
Liberty Mutual	38.8%	27.6%	26.1%	7.5%	9.5%	148
Nationwide	37.8%	26.9%	28.8%	6.4%	11.9%	177
Progressive	25.5%	29.1%	33.6%	11.8%	10.6%	123
State Farm	54.9%	24.2%	17.0%	3.9%	10.2%	373
USAA	52.7%	25.7%	16.9%	4.7%	8.6%	162
Non-DRP						
Allstate	32.6%	29.6%	26.0%	11.8%	11.4%	595
Farmers	33.3%	30.2%	25.4%	11.1%	14.4%	515
Geico	33.6%	28.2%	26.2%	12.0%	11.6%	622
Liberty Mutual	35.1%	29.3%	24.5%	11.0%	12.9%	510
Nationwide	34.5%	30.6%	24.9%	10.0%	13.5%	473
Progressive	33.4%	26.8%	27.6%	12.2%	11.3%	584
State Farm	39.0%	27.9%	22.8%	10.2%	12.1%	379
USAA	38.7%	30.4%	20.9%	10.0%	12.7%	527

Repair Adjacent Panels - 2018

To me, adjacent panel damage (like weld burn damage) is one of the most commonly overlooked items on an estimate. When a technician removes a damaged welded-in panel for replacement, it is almost always necessary to repair the adjacent panels that were damaged during the removal process. That damage is unavoidable. After removing a rear body panel, for example, a technician may have to repair the left and right frame rail flanges, the left and right tail light pockets, the floor pan area, and possibly floor or quarter panel extensions.

Notes from Mike



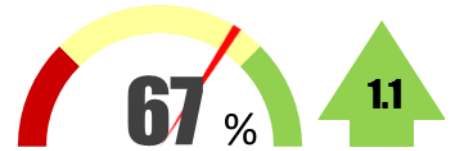
The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
11849	AudaExplore	Link to DEG inquiry result
11881	CCC	Link to DEG inquiry result
11240	Mitchell	Link to DEG inquiry result

Remove molding/emblem/decals adhesive

Of those that negotiate for this overall, 67% are paid "always" or "most of the time."



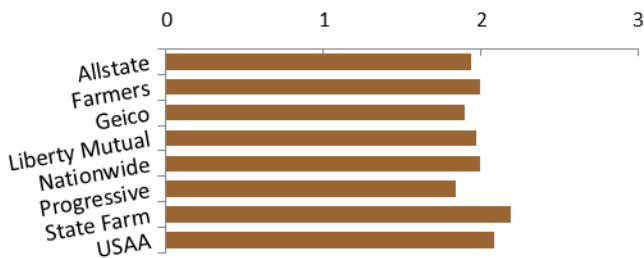
Procedure description: Labor (not included in molding/emblem installation time) to remove old adhesive residue from the vehicle.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	42.2%	22.9%	21.5%	13.3%	16.8%	766
Farmers	44.7%	22.1%	22.1%	11.2%	19.2%	684
Geico	41.2%	22.8%	21.3%	14.7%	16.8%	750
Liberty Mutual	42.4%	23.7%	22.3%	11.5%	16.9%	700
Nationwide	43.6%	23.8%	21.2%	11.4%	19.3%	696
Progressive	38.6%	23.3%	22.0%	16.1%	17.2%	763
State Farm	54.5%	19.3%	16.8%	9.4%	16.5%	805
USAA	49.0%	22.0%	18.4%	10.6%	17.0%	740

Remove Adhesive - 2018

Insurance company payment frequency comparison

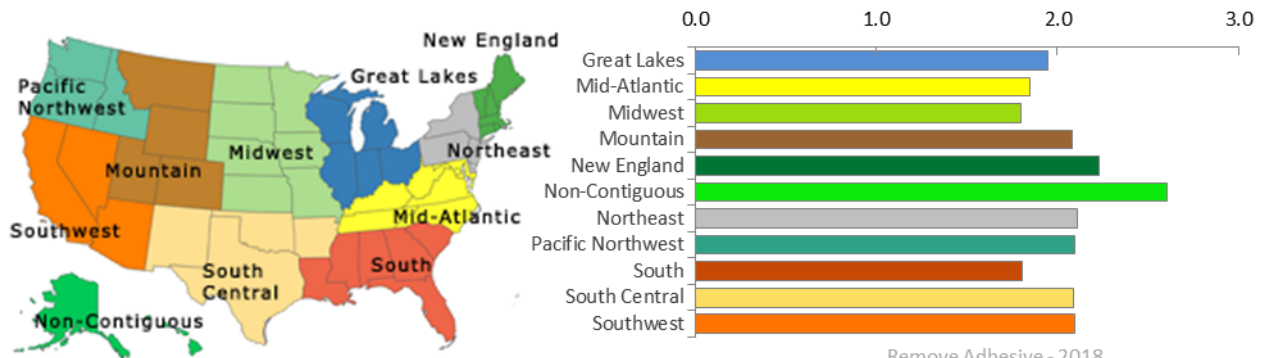


Remove Adhesive - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



Remove Adhesive - 2018

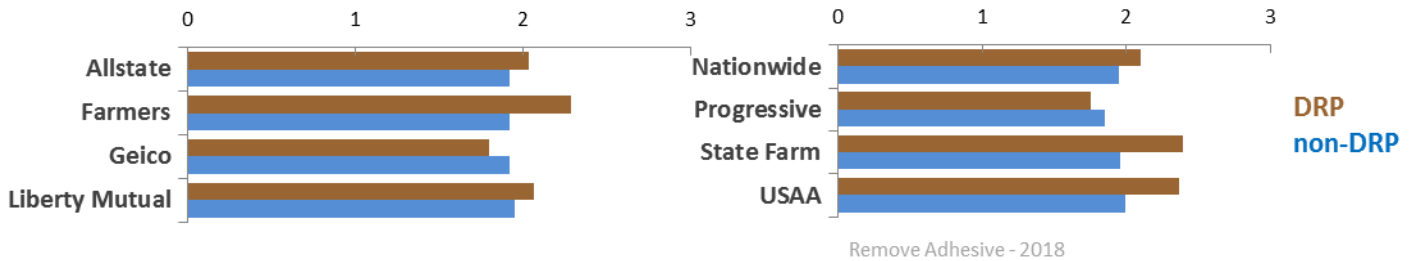
Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	44.0%	22.1%	18.6%	15.2%	20.5%	1263
Mid-Atlantic	41.1%	20.1%	21.3%	17.5%	14.9%	503
Midwest	38.9%	19.9%	23.8%	17.4%	29.5%	871
Mountain	52.9%	14.0%	21.5%	11.6%	21.5%	219
New England	54.1%	19.8%	21.6%	4.6%	12.7%	324
Non-Contiguous	74.7%	14.7%	7.4%	3.2%	24.0%	125
Northeast	43.6%	29.6%	20.8%	5.9%	9.1%	613
Pacific Northwest	47.0%	24.1%	20.7%	8.2%	5.6%	338
South	39.6%	19.3%	24.2%	16.9%	12.8%	643
South Central	50.0%	20.7%	18.0%	11.3%	22.3%	579
Southwest	41.7%	32.3%	19.8%	6.1%	7.7%	426

Remove Adhesive - 2018

Remove molding/emblem/decals adhesive

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.




DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	51.0%	16.3%	18.3%	14.4%	11.9%	118
Farmers	58.3%	19.4%	15.5%	6.8%	18.9%	127
Geico	46.4%	8.7%	23.2%	21.7%	10.4%	77
Liberty Mutual	47.7%	24.2%	15.6%	12.5%	14.1%	149
Nationwide	51.4%	18.6%	18.6%	11.4%	21.3%	178
Progressive	39.6%	17.8%	20.8%	21.8%	18.5%	124
State Farm	66.3%	15.2%	9.8%	8.6%	15.8%	374
USAA	64.7%	14.7%	13.2%	7.4%	16.6%	163
Non-DRP						
Allstate	40.7%	24.0%	22.1%	13.2%	18.4%	593
Farmers	41.1%	22.7%	23.7%	12.5%	19.8%	510
Geico	40.9%	24.3%	20.9%	13.8%	18.3%	619
Liberty Mutual	40.5%	24.5%	24.0%	10.9%	18.4%	505
Nationwide	39.8%	26.4%	22.7%	11.1%	19.4%	470
Progressive	37.9%	24.8%	21.9%	15.4%	17.7%	583
State Farm	41.1%	23.7%	25.0%	10.2%	18.5%	373
USAA	43.5%	24.0%	20.7%	11.9%	17.9%	524

Remove Adhesive - 2018

Keep in mind that the labor to replace a molding or an emblem is only to reinstall the old emblem or molding; it does not include the additional labor to remove the old adhesive (nor any material costs, such as an eraser wheel). A judgement time for this should be calculated based on how long it takes the average technician (one with 5 to 7 years of experience) to gather up the needed tools and supplies, perform the task in a safe and proper manner, and return the tools and supplies back to their proper storage place, as well as clean up the work area from any residue.

Notes from Mike



The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
909	AudaExplore	Link to DEG inquiry result
851	CCC	Link to DEG inquiry result
1901	Mitchell	Link to DEG inquiry result

Clean and re-tape molding

Of those that negotiate for this overall, 88% are paid "always" or "most of the time."



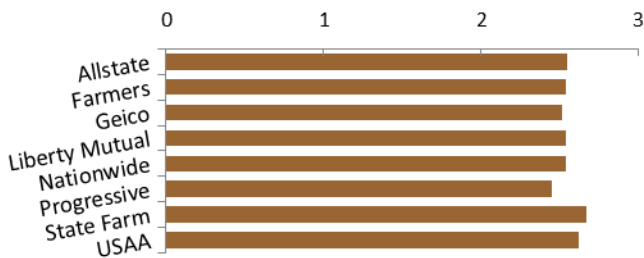
Procedure description: Labor to remove tape/adhesive from molding and apply new tape adhesive prior to reuse.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	70.0%	17.9%	9.2%	2.9%	1.7%	773
Farmers	69.6%	18.6%	7.9%	3.9%	2.9%	692
Geico	69.0%	17.7%	9.4%	3.9%	1.3%	752
Liberty Mutual	69.5%	18.3%	8.6%	3.6%	2.1%	703
Nationwide	70.1%	17.5%	9.0%	3.4%	2.7%	698
Progressive	65.7%	18.4%	11.0%	4.9%	1.3%	766
State Farm	76.8%	15.6%	5.5%	2.1%	1.5%	808
USAA	73.3%	18.4%	5.6%	2.6%	2.2%	743

Clean and Retape Molding - 2018

Insurance company payment frequency comparison

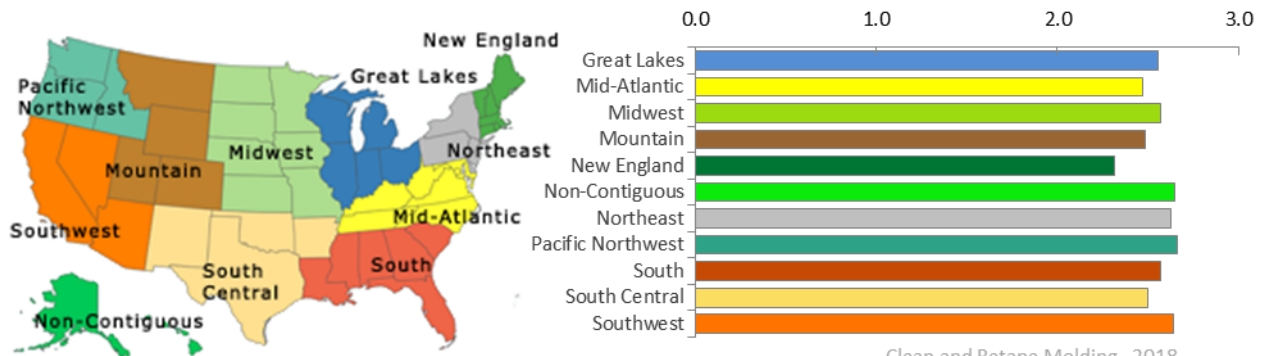


Clean and Retape Molding - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



Clean and Retape Molding - 2018

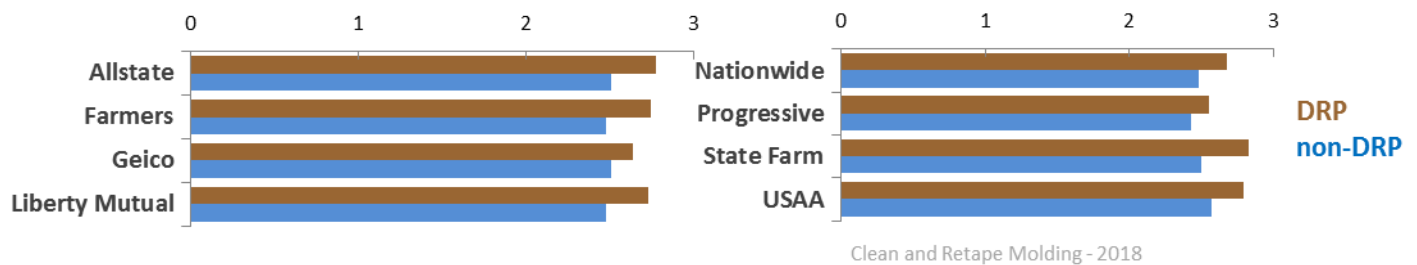
Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	70.2%	19.9%	6.0%	3.9%	1.2%	1296
Mid-Atlantic	66.2%	19.7%	9.1%	4.9%	2.9%	485
Midwest	72.0%	16.1%	8.6%	3.3%	3.2%	866
Mountain	69.1%	14.1%	13.2%	3.6%	0.5%	221
New England	56.4%	26.2%	10.1%	7.4%	2.6%	306
Non-Contiguous	82.8%	3.9%	8.6%	4.7%	0.0%	128
Northeast	74.0%	16.1%	8.2%	1.7%	3.1%	620
Pacific Northwest	74.2%	18.1%	7.1%	0.6%	0.0%	337
South	73.0%	13.6%	10.6%	2.8%	2.1%	655
South Central	67.9%	19.0%	8.5%	4.7%	1.4%	587
Southwest	73.0%	19.2%	6.8%	0.9%	1.8%	434

Clean and Retape Molding - 2018

Clean and re-tape molding

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	83.3%	11.7%	4.2%	0.8%	0.0%	120
Farmers	81.4%	14.7%	1.6%	2.3%	0.0%	129
Geico	77.6%	11.8%	7.9%	2.6%	0.0%	76
Liberty Mutual	80.0%	14.7%	3.3%	2.0%	0.7%	151
Nationwide	79.7%	10.2%	9.0%	1.1%	1.1%	179
Progressive	71.8%	15.3%	8.9%	4.0%	0.8%	125
State Farm	87.9%	8.3%	2.7%	1.1%	0.3%	373
USAA	84.7%	11.7%	1.8%	1.8%	0.0%	163
Non-DRP						
Allstate	67.5%	19.4%	9.7%	3.4%	1.8%	598
Farmers	66.3%	20.1%	9.2%	4.4%	3.5%	516
Geico	68.3%	18.3%	9.3%	4.1%	1.4%	621
Liberty Mutual	66.2%	20.0%	9.5%	4.3%	2.4%	506
Nationwide	66.2%	20.4%	9.0%	4.4%	3.4%	471
Progressive	64.2%	19.1%	11.6%	5.0%	1.4%	584
State Farm	65.2%	23.1%	8.2%	3.5%	2.6%	378
USAA	69.2%	21.2%	6.6%	2.9%	2.7%	527

Clean and Retape Molding - 2018

Replace vapor barrier

Of those that negotiate for this overall, 60% are paid "always" or "most of the time."



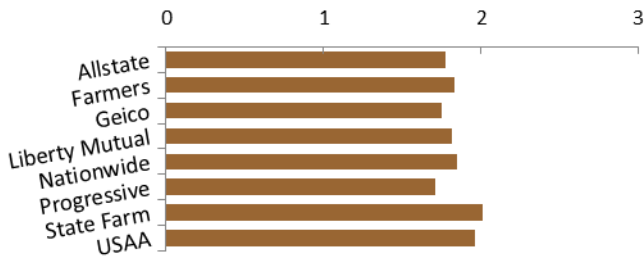
Procedure description: Labor to R&I or replace vapor barriers as necessary, particularly on vehicles with airbag pressure sensors inside doors.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	38.5%	19.6%	23.3%	18.6%	35.1%	761
Farmers	41.8%	16.8%	23.7%	17.7%	37.0%	690
Geico	38.1%	18.4%	23.8%	19.7%	35.2%	745
Liberty Mutual	40.3%	17.8%	25.3%	16.5%	35.0%	698
Nationwide	41.5%	19.3%	22.0%	17.2%	36.3%	692
Progressive	36.0%	19.0%	25.3%	19.7%	36.1%	756
State Farm	47.5%	18.6%	20.9%	13.0%	34.0%	804
USAA	45.1%	19.8%	20.5%	14.6%	35.3%	733

Replace Vapor Barrier - 2018

Insurance company payment frequency comparison

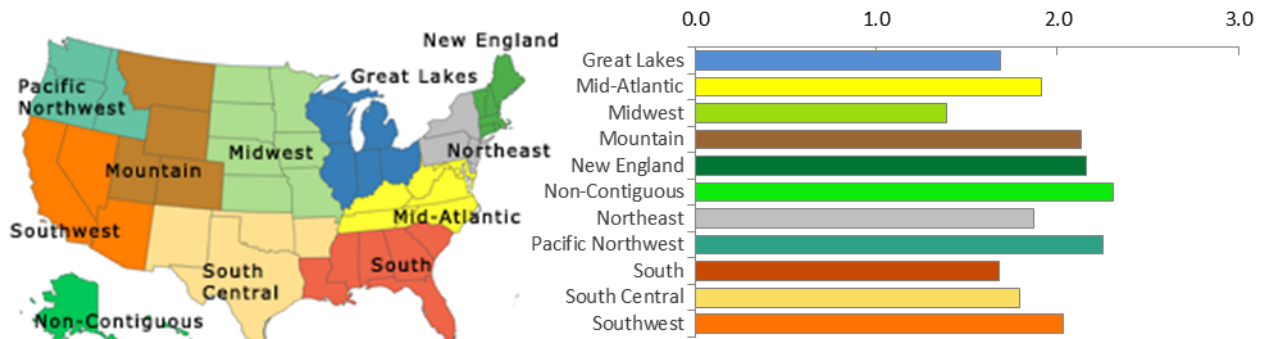


Replace Vapor Barrier - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



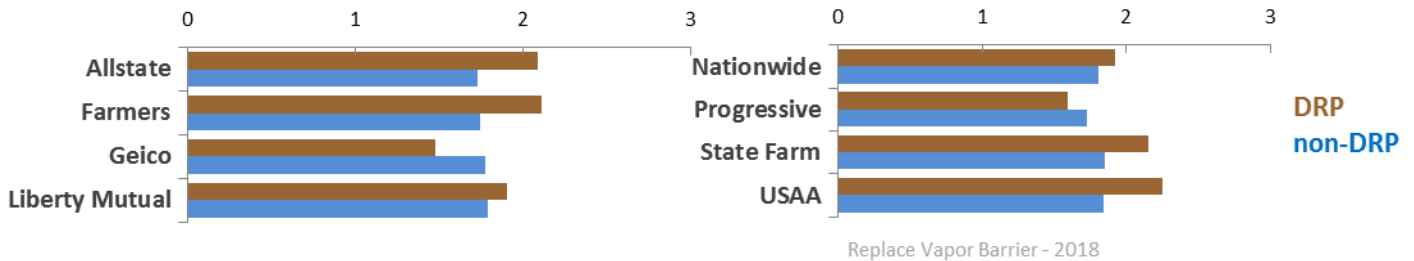
Replace Vapor Barrier - 2018

Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	38.2%	16.7%	20.9%	24.3%	44.7%	1274
Mid-Atlantic	46.7%	13.3%	24.3%	15.7%	30.0%	483
Midwest	25.1%	17.4%	29.2%	28.3%	51.7%	857
Mountain	49.3%	23.0%	19.1%	8.6%	30.3%	218
New England	47.0%	26.3%	22.0%	4.7%	26.3%	320
Non-Contiguous	61.8%	14.6%	16.9%	6.7%	29.9%	127
Northeast	40.6%	18.1%	29.4%	12.0%	20.9%	623
Pacific Northwest	53.9%	19.6%	24.4%	2.2%	19.6%	337
South	36.4%	19.6%	19.4%	24.6%	30.9%	635
South Central	36.4%	24.1%	21.6%	17.9%	44.8%	578
Southwest	49.6%	17.7%	18.9%	13.9%	20.6%	427

Replace Vapor Barrier - 2018

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	50.6%	19.0%	19.0%	11.4%	32.5%	117
Farmers	51.2%	19.5%	18.3%	11.0%	35.4%	127
Geico	32.0%	14.0%	24.0%	30.0%	34.2%	76
Liberty Mutual	40.0%	24.2%	22.1%	13.7%	35.4%	147
Nationwide	42.9%	22.7%	18.5%	16.0%	32.4%	176
Progressive	31.4%	18.6%	27.1%	22.9%	42.6%	122
State Farm	54.8%	15.7%	18.5%	10.9%	33.3%	372
USAA	56.9%	19.0%	16.4%	7.8%	28.8%	163
Non-DRP						
Allstate	36.4%	20.2%	23.6%	19.9%	35.4%	591
Farmers	39.6%	16.0%	24.8%	19.6%	37.1%	518
Geico	38.6%	19.0%	23.8%	18.5%	35.2%	616
Liberty Mutual	39.9%	16.6%	25.7%	17.8%	34.7%	507
Nationwide	40.3%	17.7%	24.2%	17.7%	37.7%	470
Progressive	36.5%	19.4%	24.9%	19.2%	34.3%	580
State Farm	39.4%	22.0%	22.8%	15.9%	34.4%	375
USAA	39.9%	21.0%	22.0%	17.1%	37.0%	521

Replace Vapor Barrier - 2018

Notes from Mike

It is critical that the estimator research to ensure that the vapor barrier is not designated by the OEM as a 1-time use part. This is common if there are airbag pressure sensors in the door.



The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
1678	AudaExplore	Link to DEG inquiry result
11407	CCC	Link to DEG inquiry result
1017	Mitchell	Link to DEG inquiry result

Additional labor to install non-OEM parts

Of those that negotiate for this overall, 21% are paid "always" or "most of the time."



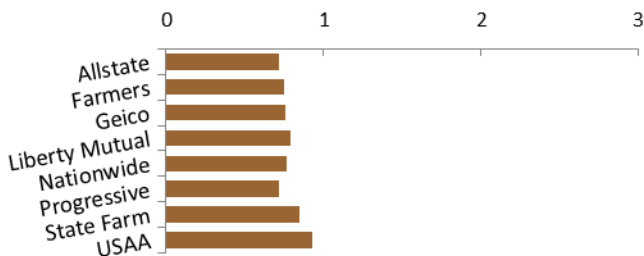
Procedure description: Test-fitting or other labor needed to ensure fit of non-OEM crash parts.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	9.1%	8.5%	27.6%	54.8%	29.2%	732
Farmers	10.1%	9.4%	26.1%	54.4%	30.7%	658
Geico	11.2%	8.7%	24.8%	55.3%	29.2%	718
Liberty Mutual	10.6%	9.8%	27.8%	51.8%	29.9%	672
Nationwide	9.8%	10.6%	26.9%	52.7%	30.6%	664
Progressive	9.7%	8.5%	26.2%	55.5%	29.0%	725
State Farm	13.0%	11.4%	23.8%	51.9%	32.9%	759
USAA	13.6%	13.4%	25.2%	47.8%	30.1%	704

Test fit non-OEM Parts - 2018

Insurance company payment frequency comparison

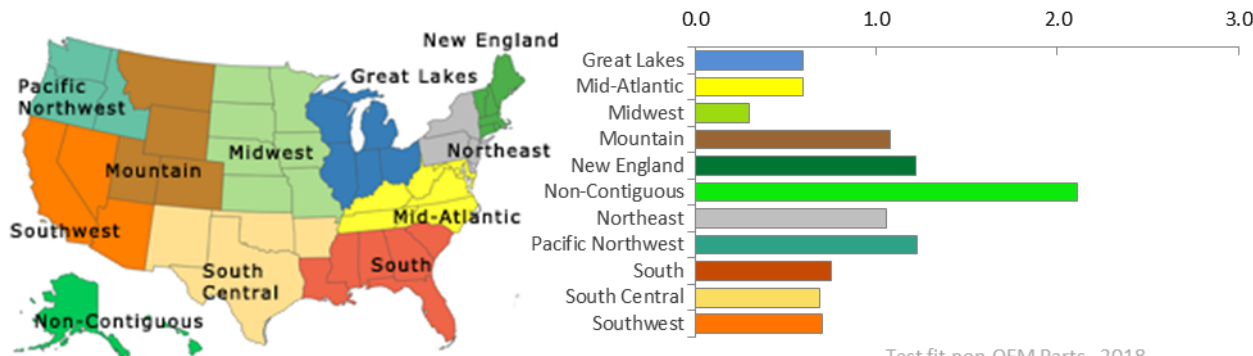


Test fit non-OEM Parts - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



Test fit non-OEM Parts - 2018

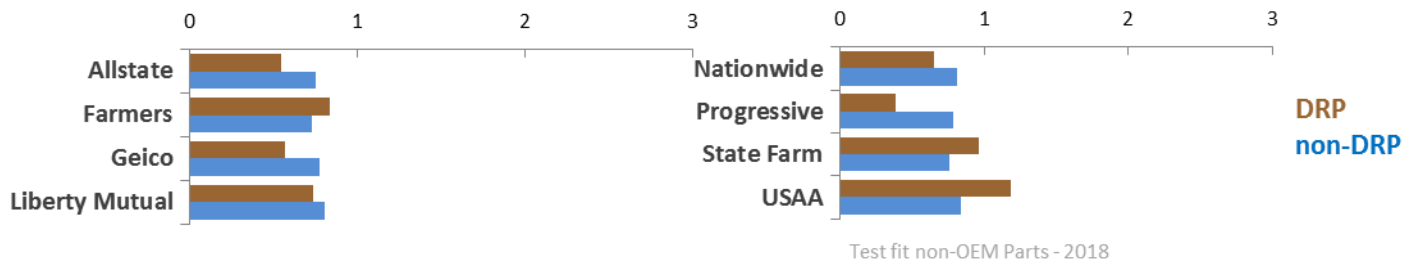
Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	8.8%	7.2%	19.0%	65.0%	34.5%	1251
Mid-Atlantic	8.4%	8.4%	18.2%	65.0%	33.7%	448
Midwest	1.7%	3.4%	18.0%	76.8%	42.7%	813
Mountain	18.0%	10.8%	32.3%	38.9%	22.0%	214
New England	21.5%	16.9%	23.6%	38.0%	11.5%	321
Non-Contiguous	54.7%	9.4%	28.1%	7.8%	40.2%	107
Northeast	12.6%	17.1%	33.9%	36.4%	16.6%	590
Pacific Northwest	25.3%	10.3%	26.3%	38.1%	13.0%	323
South	8.0%	11.2%	28.4%	52.4%	31.6%	602
South Central	7.6%	7.0%	32.1%	53.4%	36.7%	542
Southwest	1.6%	12.8%	40.0%	45.6%	27.6%	421

Test fit non-OEM Parts - 2018

Additional labor to install non-OEM parts

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	4.8%	8.3%	23.8%	63.1%	28.2%	117
Farmers	8.8%	14.3%	28.6%	48.4%	27.8%	126
Geico	12.7%	1.6%	15.9%	69.8%	17.1%	76
Liberty Mutual	8.7%	10.7%	26.2%	54.4%	29.5%	146
Nationwide	6.5%	10.5%	25.0%	58.1%	28.7%	174
Progressive	3.9%	2.6%	22.1%	71.4%	36.9%	122
State Farm	17.4%	12.8%	18.7%	51.1%	39.2%	360
USAA	19.3%	14.0%	33.3%	33.3%	28.3%	159
Non-DRP						
Allstate	10.4%	8.2%	27.6%	53.8%	29.8%	588
Farmers	10.9%	7.5%	25.6%	56.0%	31.8%	510
Geico	11.3%	9.2%	25.9%	53.5%	31.1%	615
Liberty Mutual	11.7%	9.1%	27.9%	51.3%	30.4%	504
Nationwide	11.6%	9.7%	27.0%	51.7%	31.7%	467
Progressive	11.3%	9.4%	26.2%	53.1%	27.7%	575
State Farm	9.6%	9.6%	27.4%	53.3%	27.6%	373
USAA	12.0%	12.8%	22.6%	52.5%	31.0%	519

Test fit non-OEM Parts - 2018

The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
2491	AudaExplore	Link to DEG inquiry result
12132	CCC	Link to DEG inquiry result
6689	Mitchell	Link to DEG inquiry result

Clean-up used/salvage parts

Of those that negotiate for this overall, 46% are paid "always" or "most of the time."



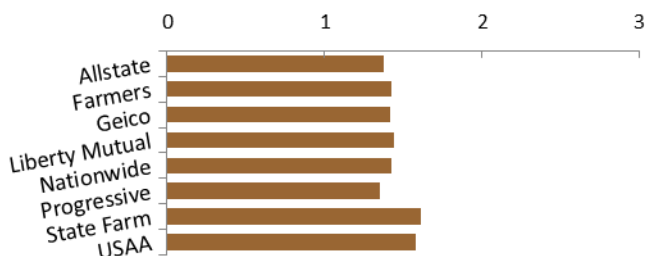
Procedure description: Labor to wash or degrease a used part prior to use.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	25.3%	17.2%	28.0%	29.4%	13.5%	731
Farmers	25.8%	18.8%	28.2%	27.2%	16.5%	655
Geico	25.9%	19.4%	25.2%	29.5%	14.2%	716
Liberty Mutual	26.5%	18.2%	28.4%	26.8%	15.4%	674
Nationwide	26.0%	18.8%	27.6%	27.6%	15.5%	660
Progressive	24.3%	17.4%	27.3%	31.0%	14.6%	728
State Farm	34.0%	17.6%	23.6%	24.8%	13.0%	770
USAA	29.8%	21.6%	25.3%	23.3%	15.9%	705

Clean Up Used Parts - 2018

Insurance company payment frequency comparison

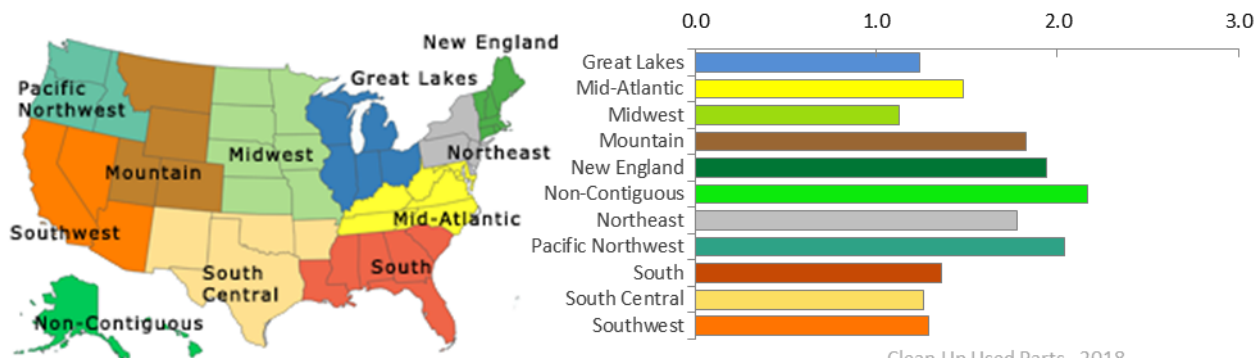


Clean Up Used Parts - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



Clean Up Used Parts - 2018

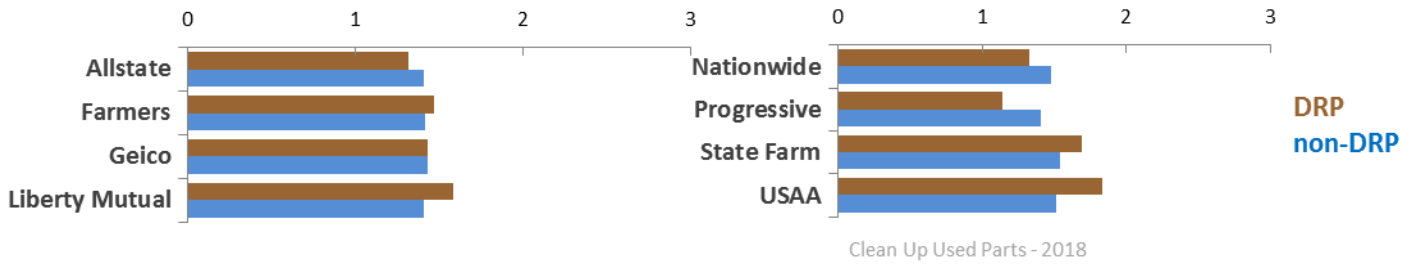
Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	20.1%	17.4%	29.0%	33.5%	12.6%	1250
Mid-Atlantic	28.1%	15.3%	33.4%	23.1%	11.4%	449
Midwest	22.2%	11.0%	24.3%	42.6%	18.3%	823
Mountain	38.3%	18.6%	31.1%	12.0%	17.6%	222
New England	43.1%	23.8%	16.9%	16.3%	1.5%	325
Non-Contiguous	59.5%	13.1%	11.9%	15.5%	18.4%	103
Northeast	33.6%	27.2%	23.0%	16.2%	5.2%	593
Pacific Northwest	47.2%	20.6%	21.6%	10.6%	14.3%	329
South	25.8%	14.0%	30.7%	29.5%	15.9%	577
South Central	19.7%	20.5%	25.9%	34.0%	32.5%	550
Southwest	15.1%	26.1%	31.1%	27.7%	14.6%	418

Clean Up Used Parts - 2018

Clean-up used/salvage parts

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	28.4%	9.8%	27.5%	34.3%	12.1%	116
Farmers	30.2%	14.2%	28.3%	27.4%	15.9%	126
Geico	33.3%	11.1%	20.6%	34.9%	16.0%	75
Liberty Mutual	34.2%	15.8%	25.0%	25.0%	18.4%	147
Nationwide	23.5%	19.5%	23.5%	33.6%	14.4%	174
Progressive	22.9%	6.4%	32.1%	38.5%	10.7%	122
State Farm	41.1%	13.4%	19.4%	26.1%	14.9%	369
USAA	43.4%	15.4%	22.1%	19.1%	13.9%	158
Non-DRP						
Allstate	25.2%	18.5%	27.8%	28.4%	14.2%	591
Farmers	25.0%	19.6%	28.1%	27.4%	16.7%	509
Geico	25.6%	20.3%	25.4%	28.8%	14.4%	617
Liberty Mutual	24.7%	18.9%	28.6%	27.7%	14.8%	508
Nationwide	27.2%	18.5%	29.2%	25.1%	16.3%	466
Progressive	25.1%	20.0%	25.3%	29.6%	15.7%	581
State Farm	27.9%	21.9%	26.7%	23.4%	11.4%	376
USAA	26.1%	23.1%	26.1%	24.7%	16.8%	525

Clean Up Used Parts - 2018

Notes from Mike

Many of the survey respondents indicated that they negotiate for this labor directly with the part provider and it therefore is not a line item on the estimate.



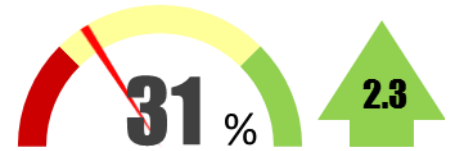
The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
11464	AudaExplore	Refer to Audatex Database Reference Manual
2208	CCC	Link to DEG inquiry result
	Mitchell	Link to DEG inquiry result

Inspect seat belts

Of those that negotiate for this overall, 31% are paid "always" or "most of the time."



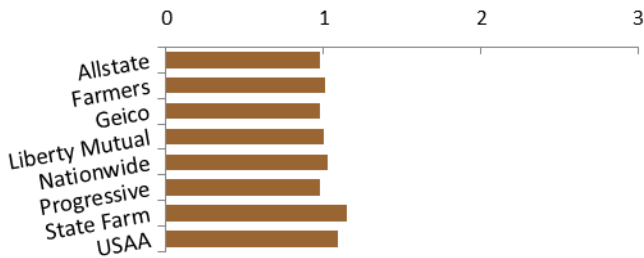
Procedure description: Labor to review condition of seat belts as per OEM requirements/recommendations.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	17.7%	11.7%	22.0%	48.7%	58.9%	730
Farmers	18.6%	11.5%	22.1%	47.8%	61.4%	655
Geico	18.6%	9.3%	23.8%	48.3%	59.4%	715
Liberty Mutual	17.9%	11.9%	22.4%	47.8%	60.2%	673
Nationwide	19.3%	12.1%	21.2%	47.3%	60.2%	663
Progressive	18.9%	10.1%	20.6%	50.3%	59.2%	725
State Farm	22.6%	12.9%	21.9%	42.6%	58.3%	765
USAA	19.8%	14.1%	21.6%	44.5%	59.7%	703

Inspect Seat Belts - 2018

Insurance company payment frequency comparison

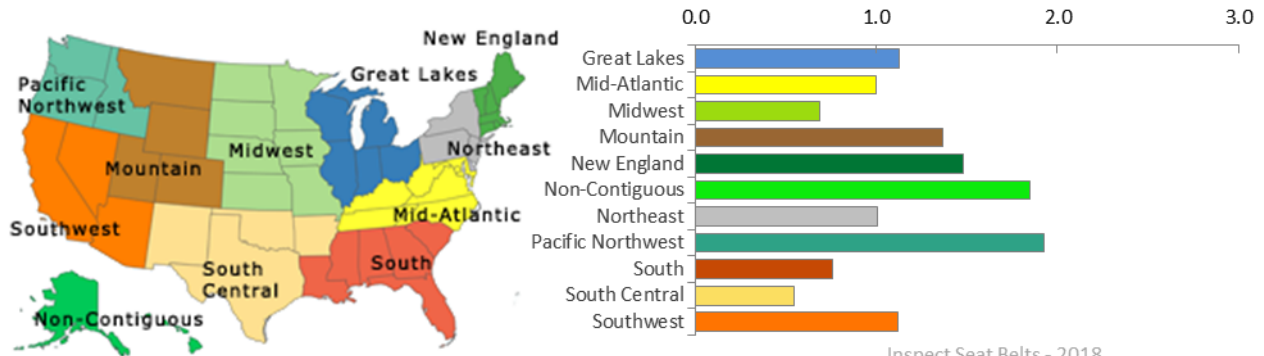


Inspect Seat Belts - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



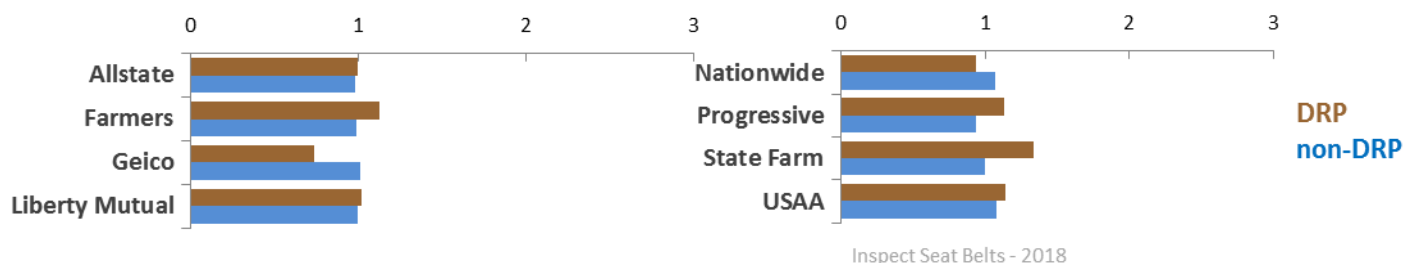
Inspect Seat Belts - 2018

Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	24.0%	8.3%	24.2%	43.5%	64.1%	1242
Mid-Atlantic	16.7%	13.5%	22.6%	47.2%	44.4%	453
Midwest	10.6%	8.2%	20.5%	60.6%	64.2%	816
Mountain	29.9%	11.9%	23.9%	34.3%	70.2%	225
New England	28.1%	23.0%	18.0%	30.9%	55.4%	312
Non-Contiguous	54.5%	3.0%	15.2%	27.3%	70.3%	111
Northeast	17.5%	11.9%	24.4%	46.2%	49.9%	605
Pacific Northwest	58.7%	7.3%	1.8%	32.1%	65.3%	314
South	8.8%	15.9%	17.3%	58.0%	49.9%	589
South Central	4.5%	3.2%	35.1%	57.1%	72.0%	550
Southwest	16.4%	18.6%	25.7%	39.3%	55.6%	412

Inspect Seat Belts - 2018

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.




DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	19.6%	10.9%	19.6%	50.0%	60.7%	117
Farmers	17.4%	17.4%	26.1%	39.1%	63.8%	127
Geico	9.7%	12.9%	19.4%	58.1%	58.1%	74
Liberty Mutual	16.1%	9.7%	33.9%	40.3%	57.5%	146
Nationwide	17.6%	7.4%	26.5%	48.5%	61.6%	177
Progressive	23.1%	13.5%	17.3%	46.2%	57.0%	121
State Farm	30.9%	7.9%	25.2%	36.0%	62.2%	368
USAA	20.0%	13.8%	26.2%	40.0%	59.1%	159
Non-DRP						
Allstate	17.2%	11.9%	22.5%	48.4%	58.6%	589
Farmers	19.0%	10.0%	21.5%	49.5%	60.8%	510
Geico	19.7%	8.8%	24.5%	47.0%	59.6%	617
Liberty Mutual	18.6%	12.6%	19.1%	49.7%	60.8%	508
Nationwide	20.2%	13.8%	19.1%	46.8%	59.7%	466
Progressive	18.0%	9.4%	21.5%	51.1%	59.8%	579
State Farm	15.9%	16.5%	19.4%	48.2%	54.4%	373
USAA	19.6%	14.4%	20.6%	45.5%	60.0%	522

Inspect Seat Belts - 2018

Out of all of the procedures in the survey, this is the one that most keeps me awake at night. Every OEM has a very specific procedure for how to inspect seatbelts. Some even go so far as to state they must be replaced if they were in-use during a collision. Some OEMs also state that the inspection process includes using a scan tool. The response to this question is very concerning to me. It indicates to me that too few shops are researching OEM repair procedures and are thus not aware of this requirement. As an industry, we must accept responsibility for researching and following the requirements for this on every vehicle.

Notes from Mike



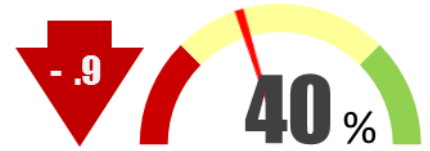
The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
12132	AudaExplore	Refer to Audatex Database Reference Manual
	CCC	Link to DEG inquiry result
	Mitchell	Refer to Mitchell Collision Estimating Guide

Duplicate OEM texture of seam-sealer

Of those that negotiate for this overall, 40% are paid "always" or "most of the time."



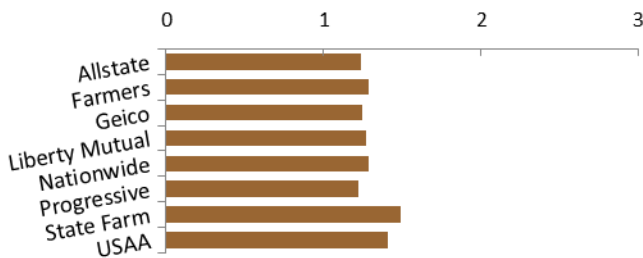
Procedure description: Additional labor to match appearance/texture of seam-sealer.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	20.2%	16.5%	29.9%	33.3%	43.8%	731
Farmers	21.5%	18.4%	27.8%	32.3%	45.9%	653
Geico	21.8%	15.1%	29.3%	33.7%	43.7%	716
Liberty Mutual	21.4%	16.5%	30.3%	31.9%	44.9%	671
Nationwide	21.3%	17.0%	31.3%	30.4%	46.4%	657
Progressive	20.6%	15.6%	29.0%	34.7%	44.3%	723
State Farm	28.0%	19.1%	27.3%	25.6%	43.9%	765
USAA	24.9%	19.0%	27.8%	28.3%	45.1%	701

Duplicate OEM Texture Seam-Sealer - 2018

Insurance company payment frequency comparison

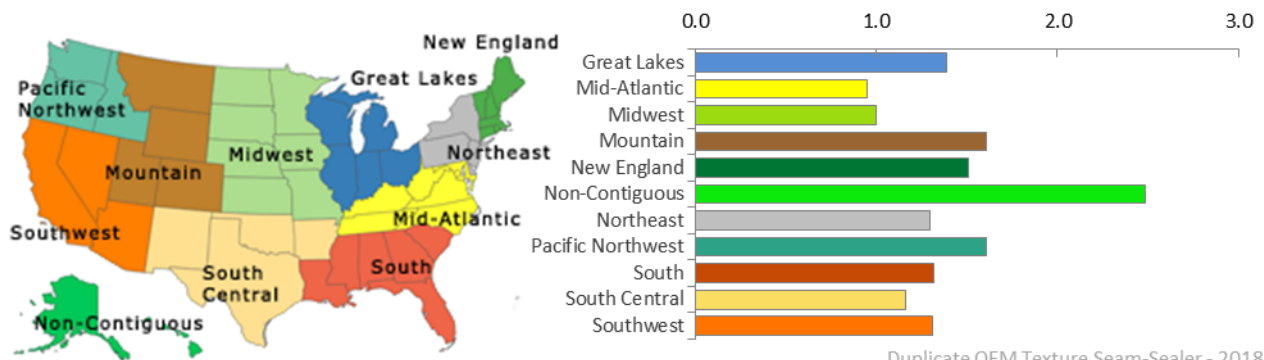


Duplicate OEM Texture Seam-Sealer - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



Duplicate OEM Texture Seam-Sealer - 2018

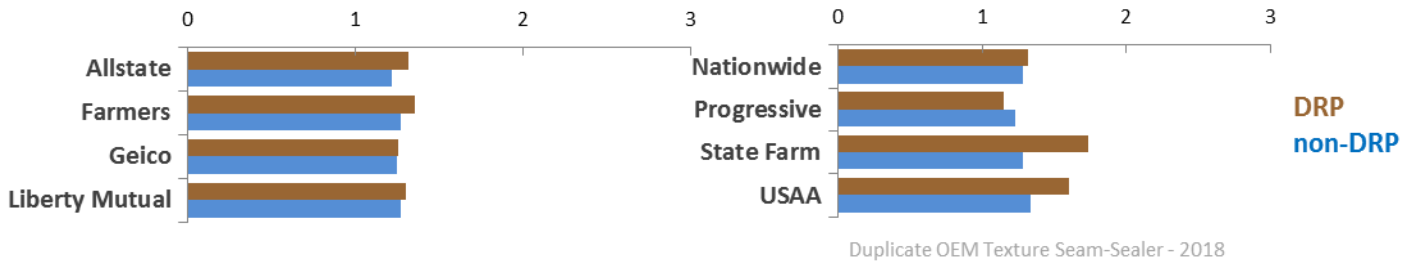
Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	25.9%	15.6%	30.0%	28.5%	40.5%	1231
Mid-Atlantic	9.2%	16.0%	34.9%	39.9%	45.9%	440
Midwest	16.3%	12.4%	26.4%	45.0%	53.5%	832
Mountain	27.0%	30.4%	19.1%	23.5%	48.9%	225
New England	29.2%	22.0%	19.6%	29.2%	45.3%	307
Non-Contiguous	81.6%	2.0%	0.0%	16.3%	57.8%	116
Northeast	15.9%	22.6%	37.4%	24.1%	43.1%	606
Pacific Northwest	29.2%	21.5%	30.6%	18.7%	33.4%	329
South	27.3%	15.8%	18.5%	38.4%	41.1%	579
South Central	19.7%	14.5%	27.6%	38.3%	46.7%	544
Southwest	16.3%	17.6%	46.6%	19.5%	45.8%	408

Duplicate OEM Texture Seam-Sealer - 2018

Duplicate OEM texture of seam-sealer

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	28.1%	10.5%	26.3%	35.1%	51.3%	117
Farmers	23.4%	21.9%	21.9%	32.8%	49.2%	126
Geico	34.0%	4.3%	14.9%	46.8%	36.5%	74
Liberty Mutual	20.9%	17.9%	31.3%	29.9%	54.4%	147
Nationwide	25.9%	11.1%	32.1%	30.9%	53.7%	175
Progressive	21.5%	13.8%	23.1%	41.5%	46.7%	122
State Farm	39.0%	18.0%	21.0%	22.0%	46.1%	371
USAA	34.9%	16.9%	21.7%	26.5%	48.1%	160
Non-DRP						
Allstate	18.6%	17.4%	31.3%	32.7%	42.7%	592
Farmers	20.9%	17.3%	29.5%	32.4%	45.5%	510
Geico	19.9%	16.7%	31.7%	31.7%	44.9%	619
Liberty Mutual	21.3%	16.2%	30.6%	32.0%	42.5%	506
Nationwide	19.7%	18.5%	32.0%	29.7%	44.3%	465
Progressive	20.4%	15.5%	31.0%	33.1%	44.1%	578
State Farm	17.8%	20.1%	34.1%	28.0%	42.3%	371
USAA	21.8%	19.4%	30.1%	28.7%	44.4%	520

Duplicate OEM Texture Seam-Sealer - 2018

Notes from Mike

Although the labor to apply seam sealer on a welded-on or bolted-on part may be included (depending on which estimating system you use), the additional labor required to match the OEM appearance is not-included and can be very time-consuming for the technician.



The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
12130	AudaExplore	Link to DEG inquiry result
11525	CCC	Link to DEG inquiry result
DEG Tip	Mitchell	see Duplication of Seam Sealer Appearance

R+R+I components on used/salvage assemblies

Of those that negotiate for this overall, 61% are paid "always" or "most of the time."



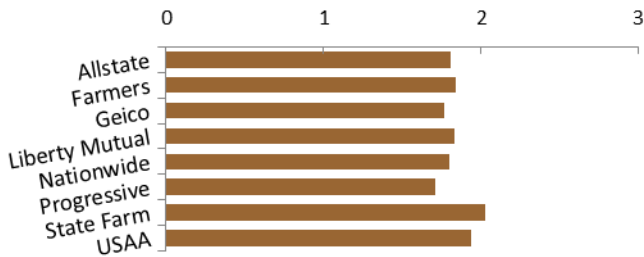
Procedure description: Labor to remove, for example, the door handle from both the vehicle being repaired and the salvage assembly, then install the door handle on the replacement salvage assembly.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	37.2%	23.6%	22.8%	16.4%	7.2%	734
Farmers	38.7%	21.7%	24.6%	14.9%	9.9%	654
Geico	36.0%	23.2%	22.0%	18.7%	7.7%	718
Liberty Mutual	38.5%	21.5%	24.3%	15.7%	8.2%	673
Nationwide	36.3%	23.2%	24.4%	16.1%	9.0%	663
Progressive	34.2%	22.1%	24.6%	19.1%	7.0%	730
State Farm	46.2%	22.7%	19.3%	11.8%	7.2%	769
USAA	42.3%	23.0%	21.0%	13.6%	8.2%	705

R+R+I Components - 2018

Insurance company payment frequency comparison

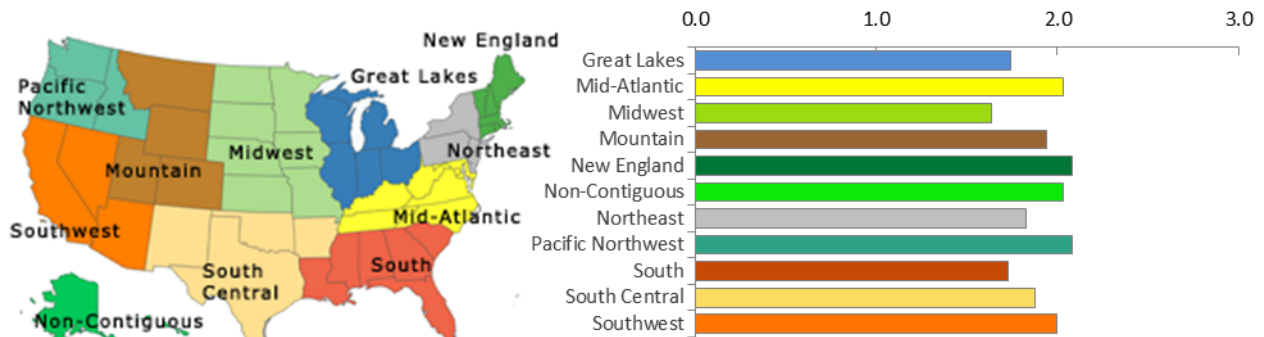


R+R+I Components - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



R+R+I Components - 2018

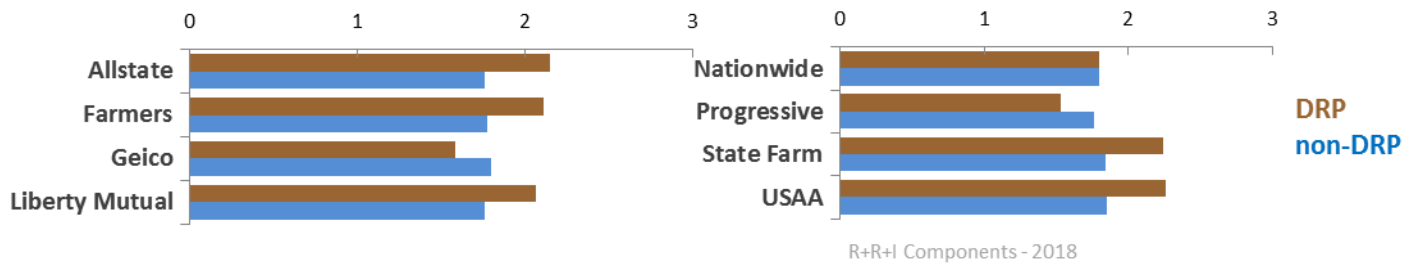
Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	35.0%	22.1%	24.6%	18.3%	4.5%	1239
Mid-Atlantic	43.8%	25.6%	20.1%	10.4%	6.8%	453
Midwest	31.6%	21.3%	26.8%	20.2%	13.4%	818
Mountain	43.0%	22.9%	19.2%	15.0%	4.0%	223
New England	44.5%	25.9%	23.0%	6.6%	2.5%	325
Non-Contiguous	51.6%	15.6%	17.2%	15.6%	38.5%	104
Northeast	37.4%	25.6%	19.5%	17.5%	7.8%	601
Pacific Northwest	47.8%	18.4%	27.6%	6.1%	8.4%	320
South	37.8%	20.7%	18.2%	23.3%	6.6%	589
South Central	44.2%	18.1%	19.1%	18.5%	11.2%	547
Southwest	38.2%	29.0%	27.5%	5.2%	5.6%	427

R+R+I Components - 2018

R+R+I components on used/salvage assemblies

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	49.1%	25.5%	16.4%	9.1%	6.0%	117
Farmers	48.7%	20.2%	24.4%	6.7%	4.8%	125
Geico	31.9%	18.8%	26.1%	23.2%	8.0%	75
Liberty Mutual	44.7%	26.2%	20.6%	8.5%	2.8%	145
Nationwide	34.9%	24.9%	25.4%	14.8%	4.0%	176
Progressive	33.0%	13.9%	26.1%	27.0%	5.7%	122
State Farm	55.8%	20.2%	16.2%	7.8%	6.5%	370
USAA	53.6%	24.5%	15.9%	6.0%	4.4%	158
Non-DRP						
Allstate	35.0%	23.3%	24.4%	17.4%	7.8%	592
Farmers	35.9%	22.4%	25.3%	16.4%	11.6%	510
Geico	36.9%	23.9%	21.6%	17.6%	7.9%	618
Liberty Mutual	36.3%	20.6%	26.0%	17.1%	10.0%	508
Nationwide	36.4%	23.1%	24.6%	15.9%	11.1%	467
Progressive	34.5%	23.9%	24.5%	17.1%	7.4%	582
State Farm	36.2%	26.2%	22.7%	14.9%	8.3%	374
USAA	38.5%	23.0%	23.3%	15.2%	9.7%	524

R+R+I Components - 2018

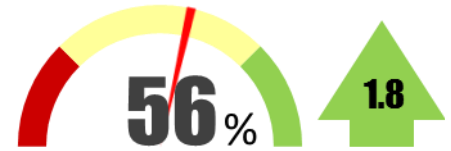
The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
4476	AudaExplore	Link to DEG inquiry result
384	CCC	Link to DEG inquiry result

Apply weld-thru primer

Of those that negotiate for this overall, 56% are paid "always" or "most of the time."



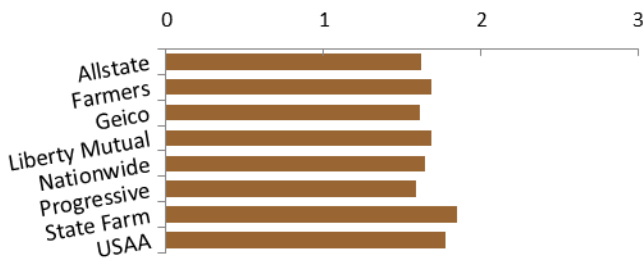
Procedure description: Labor only - not materials - to apply weld-thru primer.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	32.2%	20.8%	23.4%	23.6%	29.7%	724
Farmers	34.7%	20.7%	23.0%	21.6%	32.9%	648
Geico	31.6%	21.8%	22.2%	24.4%	29.4%	708
Liberty Mutual	34.4%	22.1%	22.1%	21.4%	30.4%	664
Nationwide	31.7%	22.6%	24.7%	21.0%	32.4%	654
Progressive	31.4%	20.5%	23.9%	24.1%	30.8%	718
State Farm	41.7%	19.8%	20.0%	18.5%	29.3%	757
USAA	37.2%	22.5%	21.1%	19.2%	30.4%	695

Apply Weld-Thru Primer - 2018

Insurance company payment frequency comparison

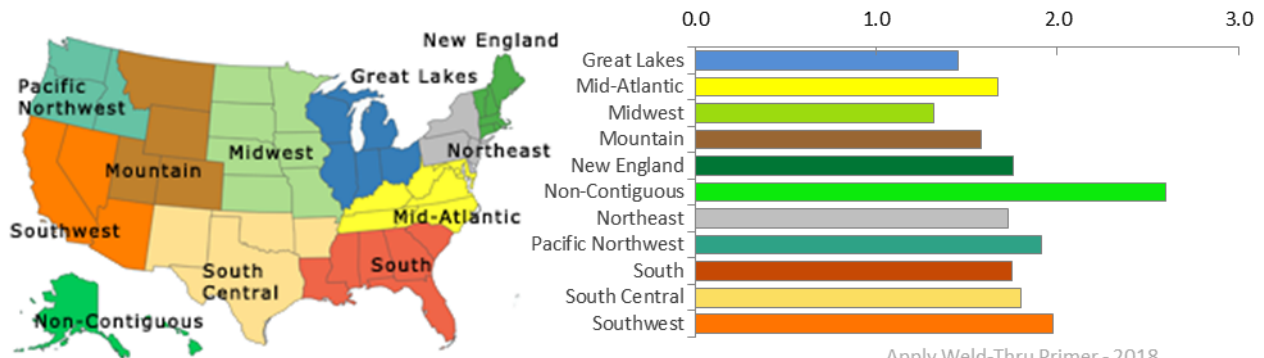


Apply Weld-Thru Primer - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



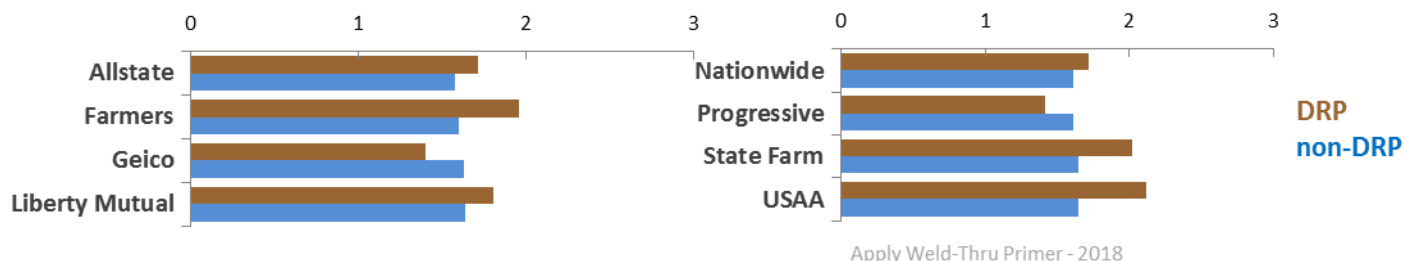
Apply Weld-Thru Primer - 2018

Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	26.6%	19.1%	27.0%	27.4%	36.2%	1214
Mid-Atlantic	36.3%	17.8%	22.6%	23.3%	37.8%	434
Midwest	16.2%	27.6%	28.3%	27.8%	50.2%	830
Mountain	29.7%	25.0%	19.2%	26.2%	23.6%	225
New England	31.8%	29.8%	21.1%	17.3%	9.4%	319
Non-Contiguous	67.0%	27.5%	4.4%	1.1%	16.5%	109
Northeast	36.3%	23.2%	17.5%	23.0%	14.7%	597
Pacific Northwest	47.5%	11.1%	25.8%	15.6%	22.0%	313
South	35.9%	24.9%	17.9%	21.3%	26.9%	572
South Central	40.7%	18.0%	22.2%	19.2%	37.8%	537
Southwest	48.4%	14.6%	23.8%	13.2%	16.5%	418

Apply Weld-Thru Primer - 2018

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	39.8%	16.1%	20.4%	23.7%	21.2%	118
Farmers	49.5%	11.0%	25.3%	14.3%	28.9%	128
Geico	35.0%	6.7%	21.7%	36.7%	20.0%	75
Liberty Mutual	40.5%	19.0%	21.6%	19.0%	22.1%	149
Nationwide	36.6%	18.7%	24.4%	20.3%	30.9%	178
Progressive	27.3%	20.8%	18.2%	33.8%	37.4%	123
State Farm	51.0%	17.1%	15.2%	16.7%	29.7%	374
USAA	54.5%	16.3%	16.3%	13.0%	24.1%	162
Non-DRP						
Allstate	30.1%	22.0%	24.2%	23.7%	31.4%	596
Farmers	30.2%	23.4%	22.8%	23.7%	34.0%	512
Geico	30.7%	24.0%	22.6%	22.6%	30.5%	623
Liberty Mutual	31.9%	23.1%	22.5%	22.5%	32.7%	508
Nationwide	29.2%	24.1%	25.1%	21.6%	32.8%	469
Progressive	31.6%	20.4%	25.3%	22.6%	29.6%	584
State Farm	31.6%	22.8%	24.7%	20.9%	29.5%	373
USAA	30.9%	24.9%	22.7%	21.5%	32.6%	524

Apply Weld-Thru Primer - 2018

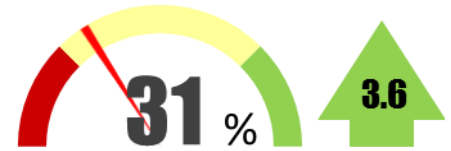
The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
12048	AudaExplore	Link to DEG inquiry result
	CCC	Refer to CCC Guide to Estimating
	Mitchell	Refer to Mitchell Collision Estimating Guide

Remove tar, grease or petroleum-based products

Of those that negotiate for this overall, 31% are paid "always" or "most of the time."



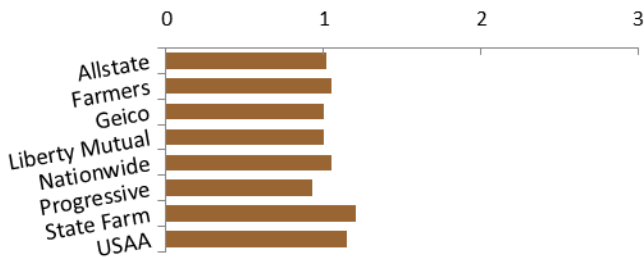
Procedure description: Additional labor to remove tar, grease or petroleum-based products that would interfere with the repair or replacement process of welded-on panels.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	14.3%	15.0%	29.0%	41.7%	57.4%	721
Farmers	17.1%	12.2%	29.3%	41.4%	59.4%	647
Geico	13.8%	16.8%	24.7%	44.7%	56.9%	705
Liberty Mutual	14.7%	14.4%	27.4%	43.5%	57.1%	665
Nationwide	15.9%	14.4%	28.5%	41.2%	57.7%	655
Progressive	11.8%	14.1%	29.6%	44.4%	57.4%	714
State Farm	21.2%	15.9%	25.2%	37.7%	57.5%	755
USAA	18.2%	16.6%	27.0%	38.2%	57.4%	695

Remove Tar Grease Before Weld - 2018

Insurance company payment frequency comparison

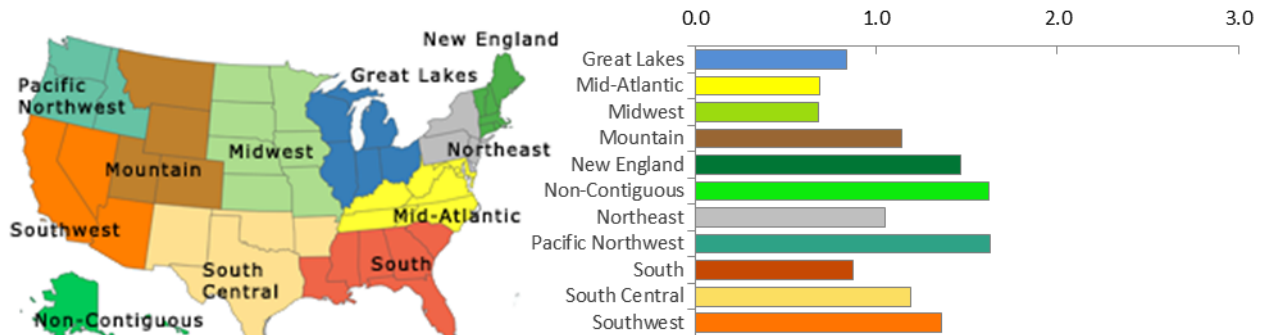


Remove Tar Grease Before Weld - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



Remove Tar Grease Before Weld - 2018

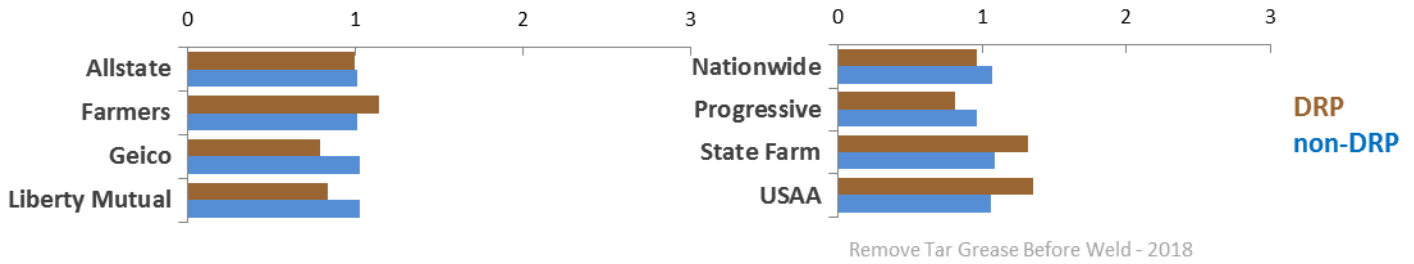
Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	10.0%	8.6%	37.0%	44.4%	60.6%	1213
Mid-Atlantic	7.8%	9.6%	26.3%	56.3%	61.9%	438
Midwest	7.7%	8.4%	28.4%	55.6%	68.6%	832
Mountain	22.9%	12.0%	21.7%	43.4%	63.1%	225
New England	23.4%	23.4%	29.7%	23.4%	35.1%	322
Non-Contiguous	42.3%	11.5%	11.5%	34.6%	73.5%	98
Northeast	11.7%	21.1%	27.2%	39.9%	50.2%	598
Pacific Northwest	35.0%	18.0%	22.4%	24.6%	41.5%	313
South	16.2%	9.0%	20.7%	54.1%	51.5%	549
South Central	19.2%	18.0%	25.7%	37.1%	69.6%	550
Southwest	18.7%	28.3%	23.3%	29.7%	47.7%	419

Remove Tar Grease Before Weld - 2018

Remove tar, grease or petroleum-based products

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.




DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	16.7%	14.6%	20.8%	47.9%	58.6%	116
Farmers	19.6%	11.8%	31.4%	37.3%	59.5%	126
Geico	15.4%	5.1%	23.1%	56.4%	48.0%	75
Liberty Mutual	9.7%	17.7%	19.4%	53.2%	58.1%	148
Nationwide	11.3%	16.9%	28.2%	43.7%	60.1%	178
Progressive	10.4%	12.5%	25.0%	52.1%	61.3%	124
State Farm	26.8%	14.8%	21.8%	36.6%	61.7%	371
USAA	30.9%	13.2%	16.2%	39.7%	57.5%	160
Non-DRP						
Allstate	13.8%	15.0%	29.9%	41.3%	57.4%	596
Farmers	15.8%	12.4%	28.7%	43.1%	59.3%	514
Geico	13.8%	18.1%	25.0%	43.1%	58.1%	621
Liberty Mutual	15.5%	13.6%	29.5%	41.4%	56.9%	511
Nationwide	17.2%	13.8%	28.1%	40.9%	56.9%	471
Progressive	12.4%	14.4%	30.0%	43.2%	56.9%	580
State Farm	16.1%	16.1%	28.2%	39.7%	53.5%	374
USAA	13.4%	17.9%	30.4%	38.4%	57.5%	527

Remove Tar Grease Before Weld - 2018

Like repairing weld burn damage or repairing adjacent panel damage, this is one of the items I most commonly see left off estimates. Keep in mind that there are a number of reasons why these things need to be removed: for access to remove welds, removal to avoid having them catch fire during welding, etc. Most automakers state very clearly in the repair procedures that this is a required step.

Notes from Mike



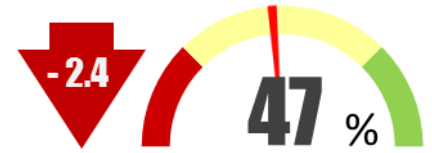
The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
12043	AudaExplore	Link to DEG inquiry result
575	CCC	Link to DEG inquiry result
2208	Mitchell	Link to DEG inquiry result

Remove sound-deadening material

Of those that negotiate for this overall, 47% are paid "always" or "most of the time."



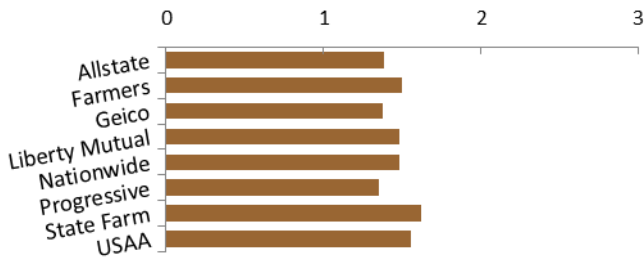
Procedure description: Labor to remove damaged sound-deadening material from a damaged component that is to be repaired.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	22.7%	21.0%	29.4%	27.0%	42.4%	721
Farmers	26.8%	20.8%	27.6%	24.8%	45.0%	645
Geico	22.9%	20.2%	28.5%	28.3%	42.1%	708
Liberty Mutual	25.7%	22.5%	26.2%	25.7%	43.8%	665
Nationwide	25.3%	21.5%	28.6%	24.5%	44.1%	656
Progressive	22.5%	17.9%	31.2%	28.3%	42.1%	713
State Farm	32.0%	20.4%	25.4%	22.2%	41.5%	754
USAA	29.0%	21.9%	25.7%	23.4%	43.3%	693

Remove Sound Deadening Material - 2018

Insurance company payment frequency comparison

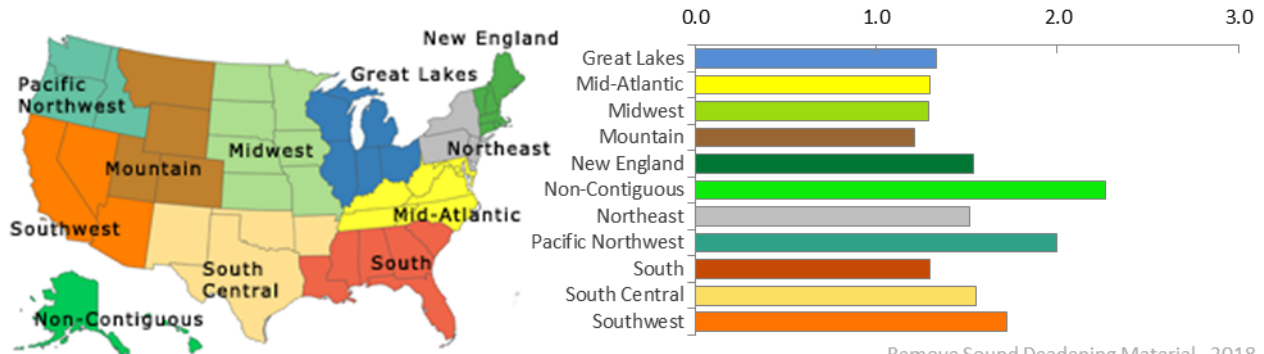


Remove Sound Deadening Material - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



Remove Sound Deadening Material - 2018

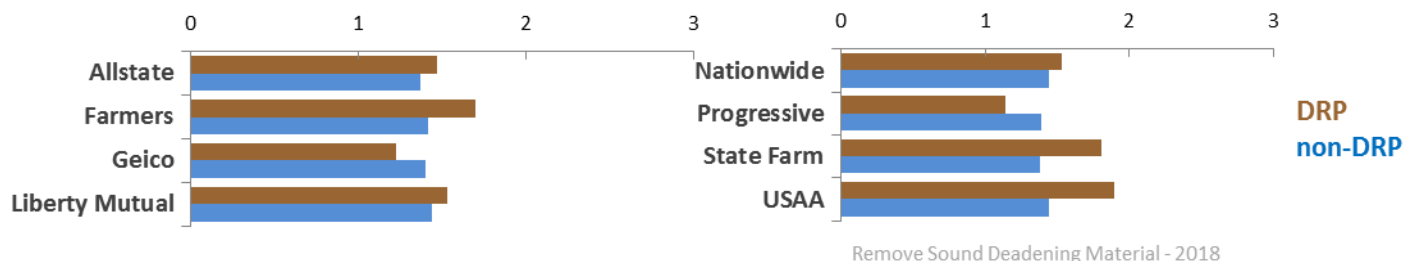
Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	25.2%	16.4%	24.9%	33.6%	41.7%	1206
Mid-Atlantic	17.6%	22.6%	31.8%	28.0%	40.0%	435
Midwest	16.9%	21.0%	36.4%	25.7%	58.4%	825
Mountain	28.0%	9.0%	19.0%	44.0%	55.6%	225
New England	26.8%	27.8%	17.5%	27.8%	39.4%	320
Non-Contiguous	56.1%	19.7%	19.7%	4.5%	36.5%	104
Northeast	27.3%	19.2%	31.7%	21.8%	42.0%	593
Pacific Northwest	43.1%	21.6%	27.0%	8.3%	34.8%	313
South	24.9%	9.8%	35.8%	29.5%	35.1%	564
South Central	25.0%	26.5%	27.2%	21.3%	50.5%	550
Southwest	25.7%	37.1%	20.3%	16.8%	25.0%	420

Remove Sound Deadening Material - 2018

Remove sound-deadening material

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	27.8%	20.8%	22.2%	29.2%	38.5%	117
Farmers	33.8%	23.4%	22.1%	20.8%	38.9%	126
Geico	23.2%	17.9%	17.9%	41.1%	25.3%	75
Liberty Mutual	27.3%	21.6%	28.4%	22.7%	40.5%	148
Nationwide	28.4%	19.6%	28.4%	23.5%	42.7%	178
Progressive	21.9%	6.8%	34.2%	37.0%	40.7%	123
State Farm	40.3%	19.9%	20.4%	19.5%	39.2%	372
USAA	45.7%	16.0%	21.3%	17.0%	42.0%	162
Non-DRP						
Allstate	21.1%	21.1%	31.0%	26.8%	43.5%	595
Farmers	24.1%	20.4%	29.2%	26.3%	46.6%	513
Geico	22.8%	20.5%	30.5%	26.2%	44.4%	624
Liberty Mutual	24.1%	23.0%	25.9%	27.0%	44.8%	511
Nationwide	23.4%	22.6%	28.7%	25.3%	44.7%	472
Progressive	22.5%	20.7%	30.0%	26.7%	42.7%	581
State Farm	21.6%	21.2%	31.3%	26.0%	44.2%	373
USAA	22.8%	24.1%	27.2%	25.9%	43.9%	524

Remove Sound Deadening Material - 2018

The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
433	CCC	Link to DEG inquiry result

Install sound-deadening material

Of those that negotiate for this overall, 73% are paid "always" or "most of the time."



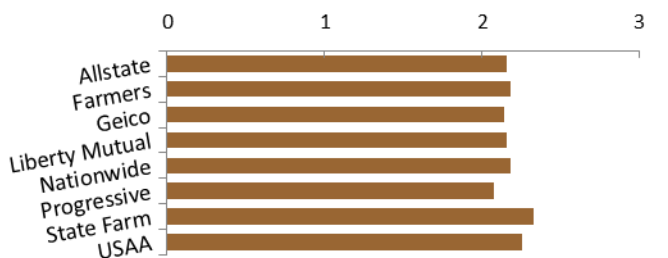
Procedure description: Labor to install sound-deadening material.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	50.9%	21.1%	21.2%	6.8%	10.1%	723
Farmers	53.2%	18.7%	21.0%	7.2%	12.7%	651
Geico	51.0%	20.7%	19.7%	8.6%	9.9%	709
Liberty Mutual	52.4%	18.1%	22.3%	7.2%	10.5%	667
Nationwide	52.8%	19.6%	20.6%	7.0%	11.3%	657
Progressive	48.5%	20.4%	21.6%	9.4%	9.9%	718
State Farm	58.6%	20.1%	17.1%	4.2%	8.7%	756
USAA	55.4%	20.0%	19.2%	5.3%	10.5%	697

Install Sound Deadening Material - 2018

Insurance company payment frequency comparison

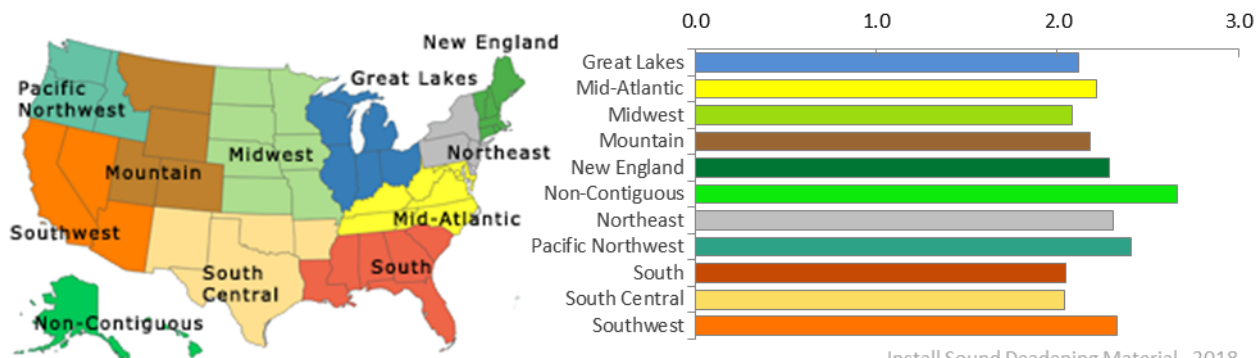


Install Sound Deadening Material - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



Install Sound Deadening Material - 2018

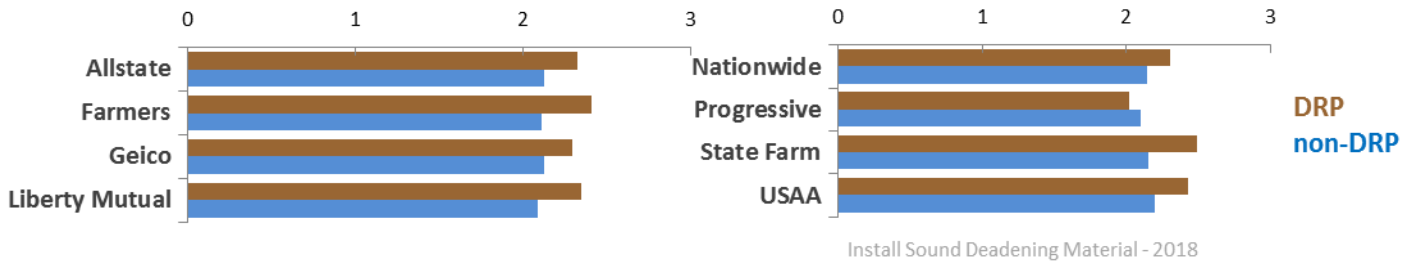
Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	51.2%	16.4%	25.3%	7.1%	8.7%	1208
Mid-Atlantic	46.9%	29.8%	21.6%	1.8%	9.3%	440
Midwest	49.2%	18.1%	23.9%	8.8%	19.2%	819
Mountain	54.1%	23.2%	9.7%	13.0%	17.8%	225
New England	61.5%	12.0%	20.6%	6.0%	5.0%	317
Non-Contiguous	79.4%	6.9%	13.7%	0.0%	6.4%	109
Northeast	53.8%	27.6%	14.0%	4.6%	5.5%	598
Pacific Northwest	63.4%	18.0%	14.5%	4.1%	1.2%	321
South	47.4%	19.8%	22.8%	9.9%	10.5%	563
South Central	47.3%	20.3%	21.2%	11.2%	18.5%	550
Southwest	59.2%	20.1%	15.0%	5.6%	3.7%	428

Install Sound Deadening Material - 2018

Install sound-deadening material

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.




DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	58.8%	20.2%	16.7%	4.4%	3.4%	118
Farmers	60.8%	21.7%	15.0%	2.5%	5.5%	127
Geico	62.2%	12.2%	18.9%	6.8%	2.6%	76
Liberty Mutual	61.2%	17.3%	17.3%	4.3%	6.1%	148
Nationwide	59.6%	15.7%	19.9%	4.8%	6.7%	178
Progressive	48.7%	15.9%	23.9%	11.5%	8.9%	124
State Farm	69.0%	14.6%	13.0%	3.4%	4.6%	372
USAA	63.4%	19.6%	13.7%	3.3%	5.0%	161
Non-DRP						
Allstate	49.2%	21.6%	22.0%	7.2%	11.4%	596
Farmers	50.9%	18.1%	22.4%	8.6%	14.5%	517
Geico	49.6%	22.1%	19.9%	8.4%	10.7%	624
Liberty Mutual	49.4%	18.5%	23.8%	8.2%	11.7%	513
Nationwide	50.0%	21.4%	20.9%	7.8%	12.9%	473
Progressive	48.8%	21.5%	21.0%	8.8%	10.1%	584
State Farm	46.8%	26.6%	21.4%	5.2%	12.8%	375
USAA	52.6%	20.5%	20.9%	6.0%	12.1%	528

Install Sound Deadening Material - 2018

More and more vehicle manufacturers are moving to liquid applied sound deadening (LASD), and the labor required to duplicate the OEM appearance of this can be very time consuming. Even traditional sound-deadening can require the technician trace the old sound deadening pad, make a template, use a heat gun to apply, etc. Sound-deadening is increasingly being used in more areas – door shells, quarter panels, trunk floors, roofs – as the OEMs move to create a quieter vehicle cabin.

Notes from Mike



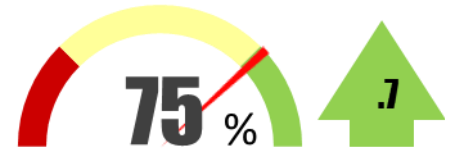
The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
4724	AudaExplore	Link to DEG inquiry result
526	CCC	Link to DEG inquiry result
1146	Mitchell	Link to DEG inquiry result

Rust-proofing

Of those that negotiate for this overall, 75% are paid "always" or "most of the time."



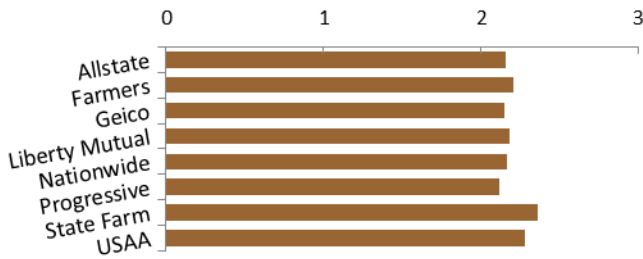
Procedure description: Labor to apply cavity wax or body wax inside of enclosed areas (such as rails) following repair or replacement to seal the inside.

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	50.1%	23.5%	19.0%	7.4%	9.5%	728
Farmers	52.7%	23.5%	16.3%	7.5%	10.4%	651
Geico	51.1%	22.1%	17.0%	9.8%	9.3%	712
Liberty Mutual	52.2%	22.2%	16.7%	8.8%	9.5%	666
Nationwide	50.8%	23.1%	18.3%	7.8%	10.5%	659
Progressive	49.5%	22.3%	18.9%	9.3%	9.2%	721
State Farm	60.9%	19.5%	13.9%	5.6%	8.7%	762
USAA	55.7%	22.5%	15.4%	6.3%	8.9%	697

Apply Cavity or Body Wax - 2018

Insurance company payment frequency comparison

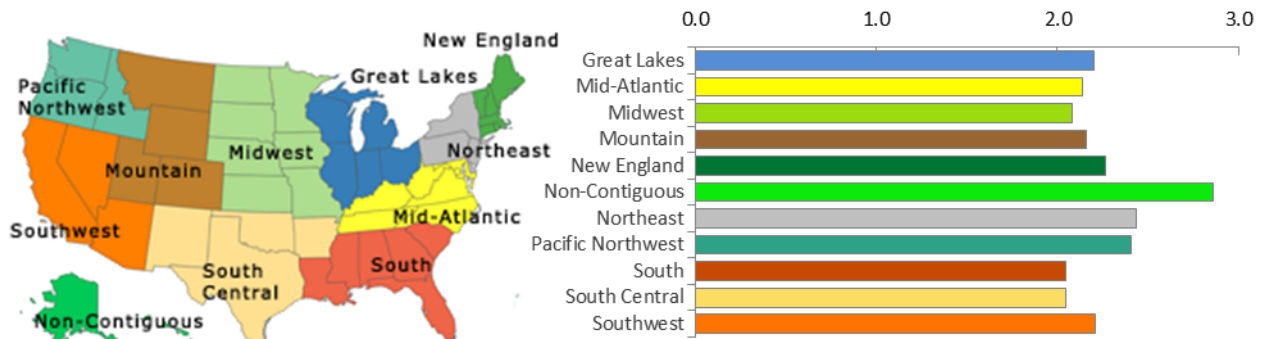


Apply Cavity or Body Wax - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



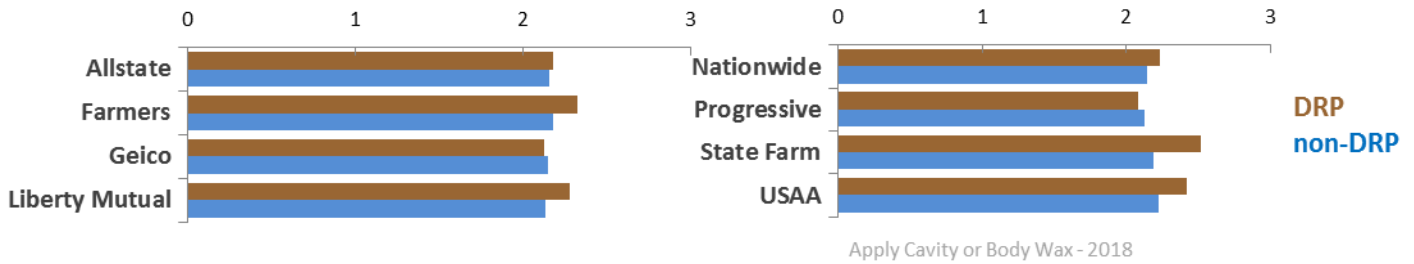
Apply Cavity or Body Wax - 2018

Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	51.1%	24.5%	17.3%	7.0%	8.1%	1211
Mid-Atlantic	49.1%	22.5%	21.7%	6.7%	7.5%	438
Midwest	48.8%	21.7%	18.5%	11.0%	14.0%	831
Mountain	53.7%	19.5%	16.3%	10.5%	15.6%	225
New England	56.3%	22.7%	12.9%	8.1%	6.3%	315
Non-Contiguous	92.6%	3.2%	2.1%	2.1%	12.8%	109
Northeast	60.0%	26.1%	11.5%	2.4%	2.5%	598
Pacific Northwest	63.9%	18.9%	11.7%	5.5%	9.3%	321
South	49.8%	18.9%	17.9%	13.4%	9.8%	570
South Central	45.2%	23.4%	22.5%	8.9%	16.0%	550
Southwest	52.0%	22.8%	19.1%	6.2%	5.6%	428

Apply Cavity or Body Wax - 2018

Responses by DRP Status


This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	54.2%	18.7%	17.8%	9.3%	10.1%	119
Farmers	56.2%	24.8%	14.9%	4.1%	5.5%	128
Geico	57.4%	13.2%	14.7%	14.7%	10.5%	76
Liberty Mutual	56.7%	20.9%	15.7%	6.7%	10.1%	149
Nationwide	56.0%	18.2%	18.9%	6.9%	11.2%	179
Progressive	49.6%	20.0%	19.1%	11.3%	7.3%	124
State Farm	70.2%	15.8%	9.6%	4.4%	8.8%	375
USAA	61.4%	23.5%	11.1%	3.9%	6.1%	163
Non-DRP						
Allstate	49.1%	24.8%	19.1%	7.0%	9.3%	600
Farmers	51.3%	23.5%	16.7%	8.6%	11.6%	516
Geico	50.2%	23.5%	17.4%	8.9%	9.1%	627
Liberty Mutual	50.5%	22.9%	17.1%	9.5%	9.4%	511
Nationwide	48.7%	25.2%	17.9%	8.2%	10.3%	474
Progressive	49.3%	23.2%	18.6%	8.9%	9.5%	587
State Farm	51.4%	23.4%	18.2%	6.9%	8.5%	378
USAA	53.5%	22.5%	16.8%	7.2%	9.7%	526

Apply Cavity or Body Wax - 2018

Notes from Mike



I see too many shops itemize just one line for 'corrosion protection' on their estimates with a lump sum for labor and materials. This is very concerning. Each individual corrosion protection operation should be itemized on the estimate (with the requisite labor and materials cost) with the OEM documentation to support each line item.

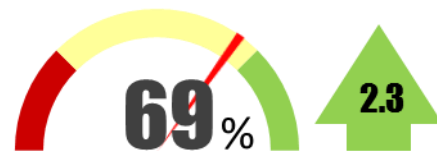
The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
11859	AudaExplore	Link to DEG inquiry result
11628	CCC	Link to DEG inquiry result
3621	Mitchell	Link to DEG inquiry result

Apply seam-sealer on welded-on panels

Of those that negotiate for this overall, 69% are paid "always" or "most of the time."



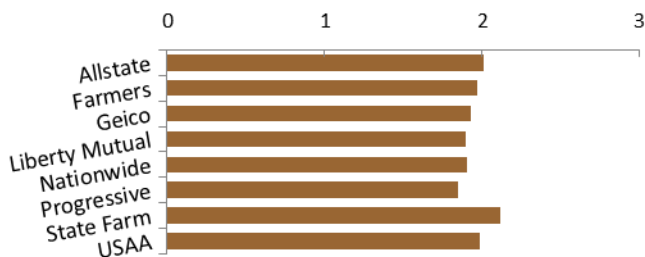
Procedure description: Labor to apply seam-sealer on new welded-on parts that are not shipped with it from the factory. (Mitchell says this is a not-included operation)

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	40.5%	34.2%	10.8%	14.4%	11.9%	126
Farmers	39.4%	30.9%	17.0%	12.8%	15.3%	111
Geico	42.1%	25.2%	15.9%	16.8%	12.3%	122
Liberty Mutual	38.6%	26.7%	20.8%	13.9%	12.9%	116
Nationwide	39.4%	27.3%	18.2%	15.2%	16.1%	118
Progressive	37.7%	26.2%	20.0%	16.2%	15.0%	153
State Farm	52.9%	21.8%	9.2%	16.0%	15.0%	140
USAA	44.7%	23.3%	18.4%	13.6%	14.2%	120

Seam Sealer on Welded Panels - 2018

Insurance company payment frequency comparison

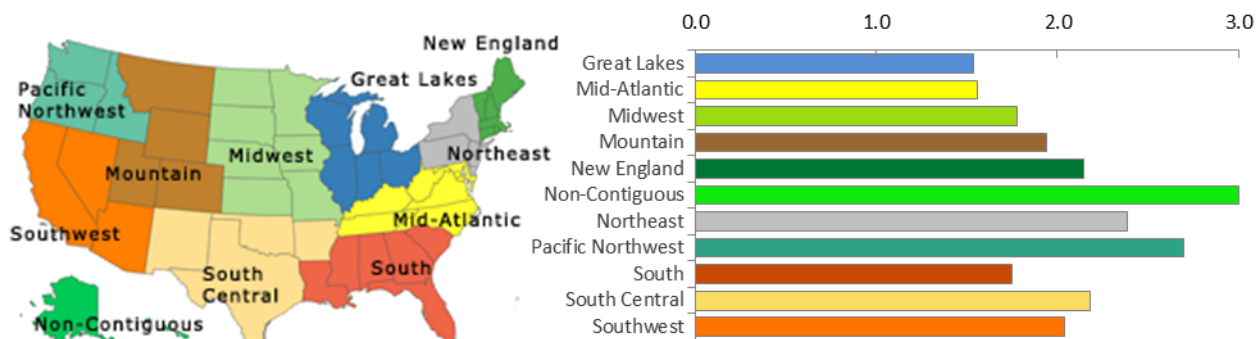


Seam Sealer on Welded Panels - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



Seam Sealer on Welded Panels - 2018

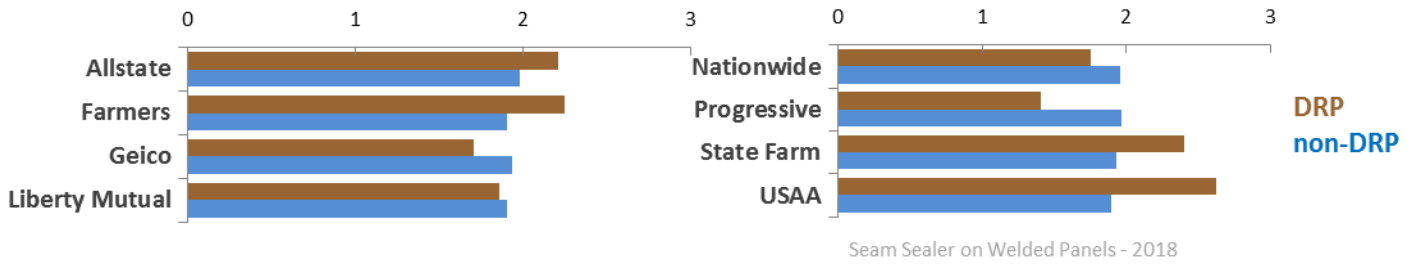
Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	20.0%	40.6%	12.3%	27.1%	12.9%	178
Mid-Atlantic	41.5%	4.9%	22.0%	31.7%	0.0%	41
Midwest	39.3%	17.2%	25.4%	18.0%	26.5%	166
Mountain	47.1%	0.0%	52.9%	0.0%	5.6%	18
New England	49.1%	32.1%	3.8%	15.1%	0.0%	53
Non-Contiguous	100.0%	0.0%	0.0%	0.0%	0.0%	1
Northeast	52.0%	36.3%	10.8%	1.0%	8.1%	111
Pacific Northwest	85.0%	0.0%	15.0%	0.0%	0.0%	40
South	45.0%	8.3%	23.3%	23.3%	14.3%	70
South Central	50.6%	19.0%	27.8%	2.5%	34.2%	120
Southwest	40.2%	37.1%	8.8%	13.9%	6.7%	208

Seam Sealer on Welded Panels - 2018

Apply seam-sealer on welded-on panels

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	42.9%	42.9%	7.1%	7.1%	12.5%	16
Farmers	43.8%	43.8%	6.3%	6.3%	20.0%	20
Geico	42.9%	14.3%	14.3%	28.6%	22.2%	9
Liberty Mutual	35.7%	28.6%	21.4%	14.3%	12.5%	16
Nationwide	41.7%	16.7%	16.7%	25.0%	11.1%	27
Progressive	33.3%	11.1%	18.5%	37.0%	22.9%	35
State Farm	72.9%	8.3%	4.2%	14.6%	15.8%	57
USAA	76.9%	15.4%	0.0%	7.7%	27.8%	18
Non-DRP						
Allstate	40.2%	33.0%	11.3%	15.5%	11.8%	110
Farmers	38.5%	28.2%	19.2%	14.1%	14.3%	91
Geico	42.0%	26.0%	16.0%	16.0%	11.5%	113
Liberty Mutual	39.1%	26.4%	20.7%	13.8%	13.0%	100
Nationwide	38.7%	30.7%	18.7%	12.0%	17.6%	91
Progressive	38.8%	30.1%	20.4%	10.7%	12.7%	118
State Farm	39.4%	31.0%	12.7%	16.9%	14.5%	83
USAA	40.0%	24.4%	21.1%	14.4%	11.8%	102

Seam Sealer on Welded Panels - 2018

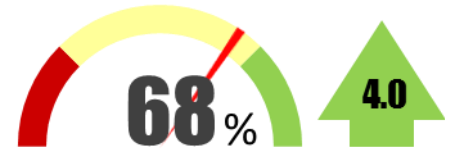
The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
12139	AudaExplore	not applicable
	CCC	not applicable
	Mitchell	Link to DEG inquiry result

Apply seam-sealer on bolted-on panels

Of those that negotiate for this overall, 68% are paid "always" or "most of the time."



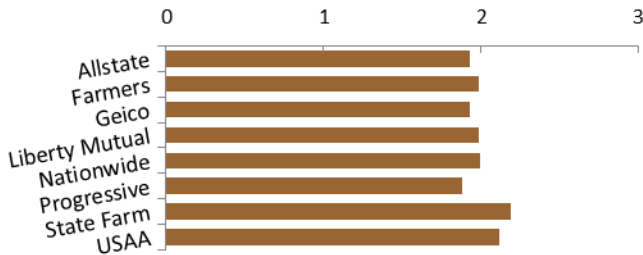
Procedure description: Labor to apply seam-sealer on new bolted-on parts that are not shipped with it from the factory. (CCC and AudaExplore say this is NOT included.)

Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	43.5%	21.9%	18.9%	15.7%	12.1%	644
Farmers	45.4%	22.0%	19.2%	13.5%	14.2%	578
Geico	43.5%	20.9%	20.0%	15.5%	13.0%	631
Liberty Mutual	46.6%	21.1%	17.2%	15.1%	12.4%	596
Nationwide	45.9%	22.2%	17.6%	14.3%	12.7%	584
Progressive	41.9%	22.2%	18.2%	17.7%	12.8%	610
State Farm	56.5%	18.3%	13.0%	12.2%	12.3%	674
USAA	52.3%	19.5%	15.7%	12.5%	13.0%	624

Seam Sealer on Bolted Parts - 2018

Insurance company payment frequency comparison

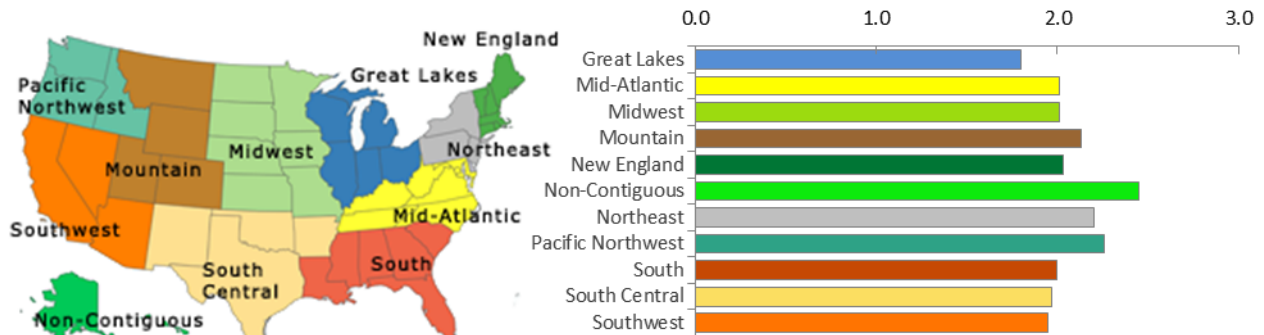


Seam Sealer on Bolted Parts - 2018

ABOVE: Overall responses for this operation. See 'How to read the survey results' on page 8 for detailed explanation.

LEFT: The chart to the left provides a graphic illustration to visually compare the relative payment frequencies of each insurer for this item. The scale is based on a composite score of all responses. See 'How to read the survey results' on page 8 for how this ranking is calculated.

Response by Region



Seam Sealer on Bolted Parts - 2018

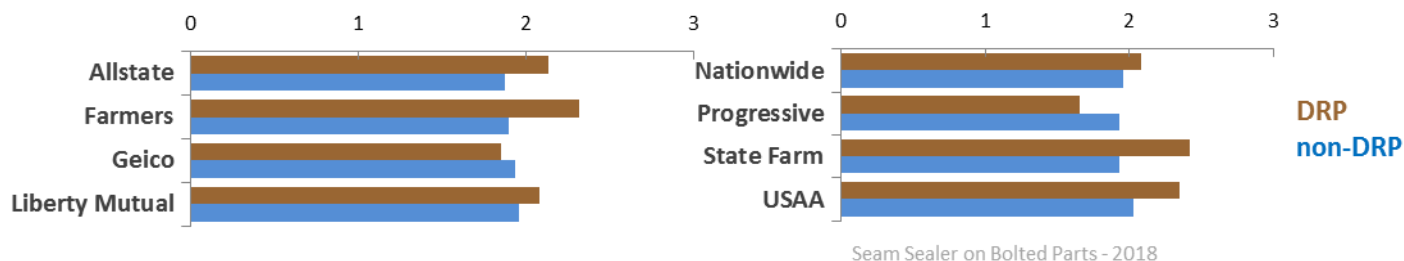
Region	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Great Lakes	39.6%	19.2%	22.7%	18.6%	10.2%	1067
Mid-Atlantic	48.0%	19.9%	17.1%	14.9%	9.4%	393
Midwest	44.9%	24.6%	17.6%	12.9%	17.0%	690
Mountain	51.1%	25.5%	8.5%	14.9%	28.4%	197
New England	46.6%	26.3%	10.9%	16.2%	11.6%	301
Non-Contiguous	72.4%	2.3%	23.0%	2.3%	15.5%	103
Northeast	57.3%	16.8%	14.3%	11.6%	9.9%	527
Pacific Northwest	53.1%	25.5%	15.2%	6.2%	7.1%	312
South	48.8%	18.7%	16.7%	15.8%	12.0%	517
South Central	48.4%	16.9%	17.5%	17.2%	20.2%	466
Southwest	39.9%	28.9%	17.3%	14.0%	8.7%	368

Seam Sealer on Bolted Parts - 2018

Apply seam-sealer on bolted-on panels

Responses by DRP Status

This breakdown shows the differing reimbursement policies of insurers with regard to whether or not a repair facility is part of the insurers' direct repair program. The results are calculated from all facilities, nationwide, that indicated their DRP status with that insurer.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	56.2%	16.2%	13.3%	14.3%	10.3%	117
Farmers	57.7%	21.6%	15.3%	5.4%	11.2%	125
Geico	45.1%	16.9%	15.5%	22.5%	6.6%	76
Liberty Mutual	49.2%	23.5%	12.9%	14.4%	10.8%	148
Nationwide	49.7%	21.9%	15.5%	12.9%	12.4%	177
Progressive	35.5%	18.3%	22.6%	23.7%	9.7%	103
State Farm	66.2%	16.7%	9.5%	7.6%	10.5%	354
USAA	64.0%	15.8%	11.5%	8.6%	12.6%	159
Non-DRP						
Allstate	40.6%	23.2%	20.2%	16.1%	12.5%	527
Farmers	41.8%	22.1%	20.3%	15.8%	15.0%	453
Geico	43.3%	21.5%	20.7%	14.4%	13.9%	555
Liberty Mutual	45.6%	20.3%	18.7%	15.4%	12.9%	448
Nationwide	44.2%	22.3%	18.6%	14.9%	12.8%	407
Progressive	43.3%	23.0%	17.3%	16.4%	13.4%	507
State Farm	45.3%	20.1%	17.2%	17.5%	14.4%	320
USAA	48.3%	20.8%	17.1%	13.9%	13.1%	465

Seam Sealer on Bolted Parts - 2018

Notes from Mike

Remember that some automaker parts (such as all Toyota and Lexus hoods, shells and decklids) do not come seam-sealed, so CCC users may need to add an estimate line-item to account for this labor.



The following submissions have been identified by the DEG as relating to this specific operation.



DEG Tracking #	Provider	Inquiry Details
11450	AudaExplore	not applicable
	CCC	Link to DEG inquiry result
	Mitchell	not applicable

OVERALL RANKING

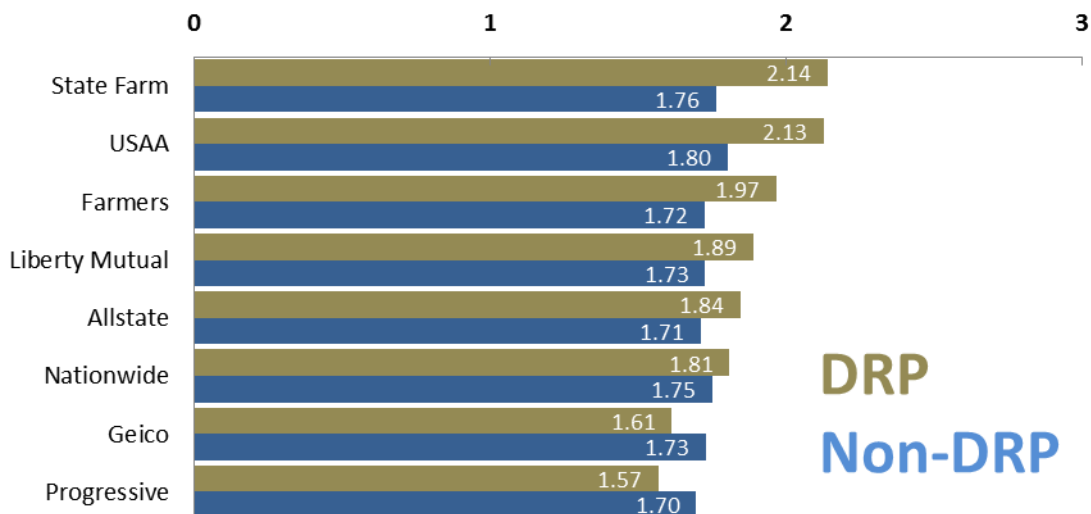
The chart below ranks relative payment frequencies for each surveyed repair operation, all insurers combined. Clean and Retape Molding is paid for most often. (See '[How to read survey results](#)' for rank calculation).

All Items by Relative Payment Frequency



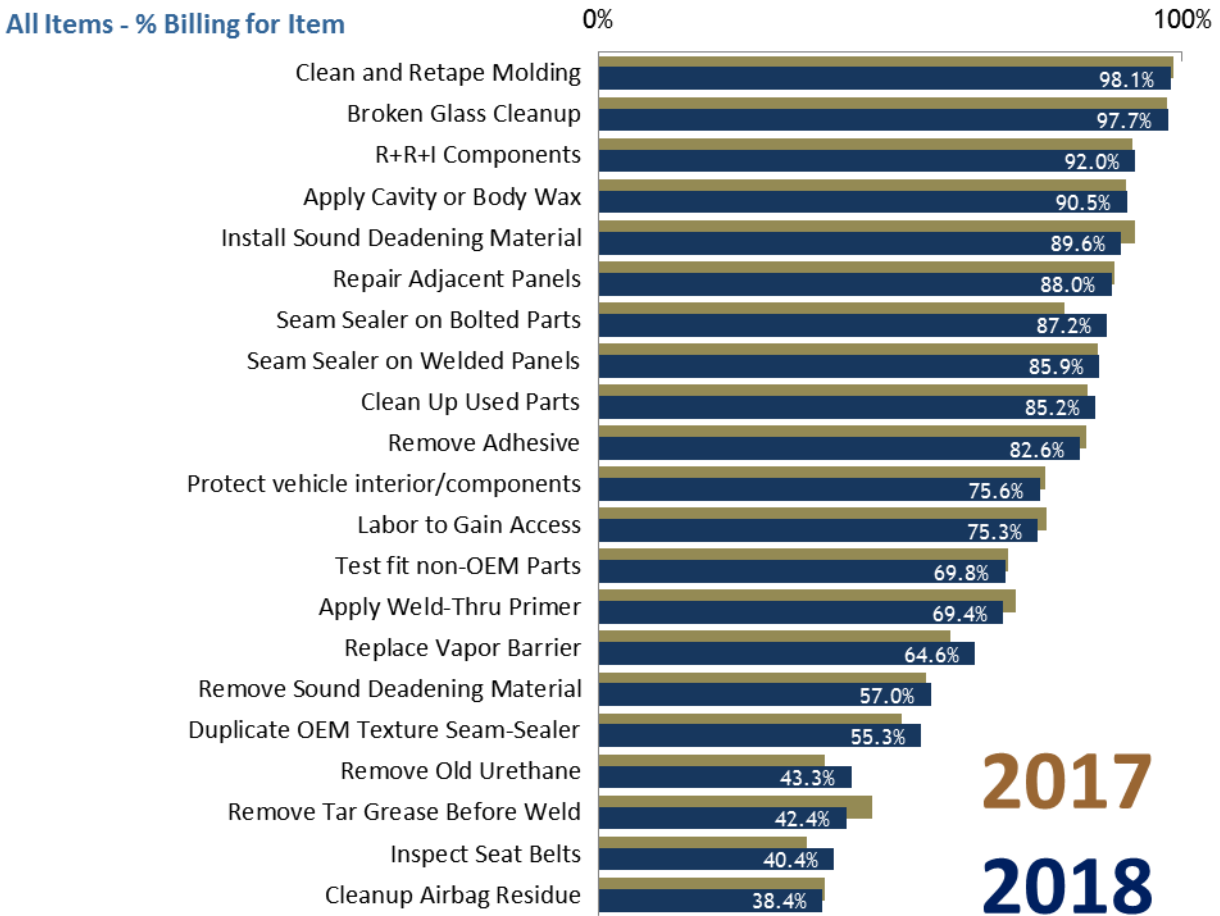
When compared to the other insurers, State Farm and USAA appear more likely to pay for not-included procedures than the other insurers. Most of the eight largest insurers are more likely to pay their DRP shops for these procedures than they are non-DRP shops, with Geico and Progressive being the exceptions.

DRP vs Non-DRP Shops - Relative Payment Frequency of All Items



NEVER ASKED?

The chart below shows the percentage of repair facilities that negotiate to be paid for the procedures listed. In 2018, for example, it can be seen that more shops sought payment for 'Remove old urethane' (43.3% of respondents) compared to 2017.



How do you use the "Who Pays for What?" survey results?

73% of shops use these survey results to train and remind staff about "not-included" repair procedures

45% share survey results with insurance company reps to demonstrate that they are not "the only one"

14% share results with customers to show that the procedures they are billing for are not "unreasonable"

ADDITIONAL QUESTIONS

Estimating systems

Estimating Systems in Use	756 Responses 2018	767 Responses 2017	743 Responses 2016
AudaExplore	28.3%	29.2%	37.7%
CCC Information Services	82.9%	79.8%	74.8%
Mitchell International	22.2%	21.3%	26.1%
Other	1.6%	2.1%	2.0%

Totals to more than 100% due to multiple system installations

28.7%
of shops reported
multiple
estimating systems
installed

In 2018, 28.7 percent of shops reported having two or more estimating systems installed. This is up slightly from the 26.5 percent recorded last year, but within the survey margin of error and not significant. Both 2017 and 2018 were both significantly below the 34.1 percent in 2016.

Notes from Mike: *It appears that CCC continues to see an increase in users while AudaExplore and Mitchell, though down last year, are virtually unchanged this year. Over the past few years, there has been a not-insignificant drop in the percentage of shops having multiple estimating systems. I think both these trends are based on more insurance companies switching to CCC, with shops following and having less of a need to have multiple estimating systems for the different insurers. It's also noteworthy that (below) more than one-third of CCC users cite the quality of the product as their primary reason for using that system – more than twice the percentage that cited that reason for Mitchell or AudaExplore.*



The primary reason for choosing to use each of the estimating systems in use at this location:

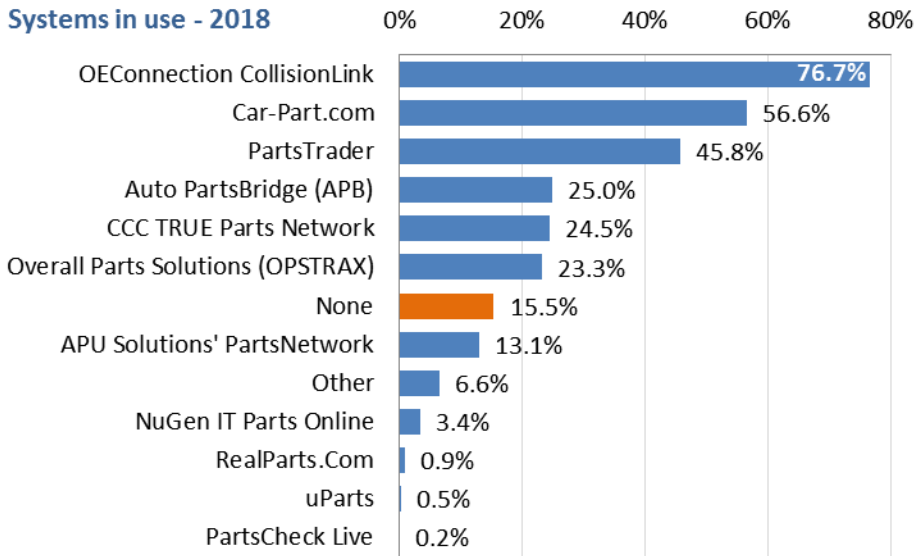
1 in 3 shops say
insurer requirements dictate
the estimating system
they use.

2018	AudaExplore	CCC	Mitchell
Ins company / DRP required	47.2%	30.5%	39.0%
Quality of product	12.7%	37.6%	12.8%
Match insurer estimates	14.6%	7.6%	21.3%
Familiarity	13.7%	15.0%	15.2%

2018

While the top reason for choosing an estimating system in many cases appears to be insurer driven, the three additional reasons most often chosen include a familiarity with the system, the overall quality of the product (the top reason for CCC users) and having the additional estimating system to match insurer-written estimates.

Electronic parts systems



84.5% of shops are using electronic parts systems
(unchanged from 84.4% in 2017)

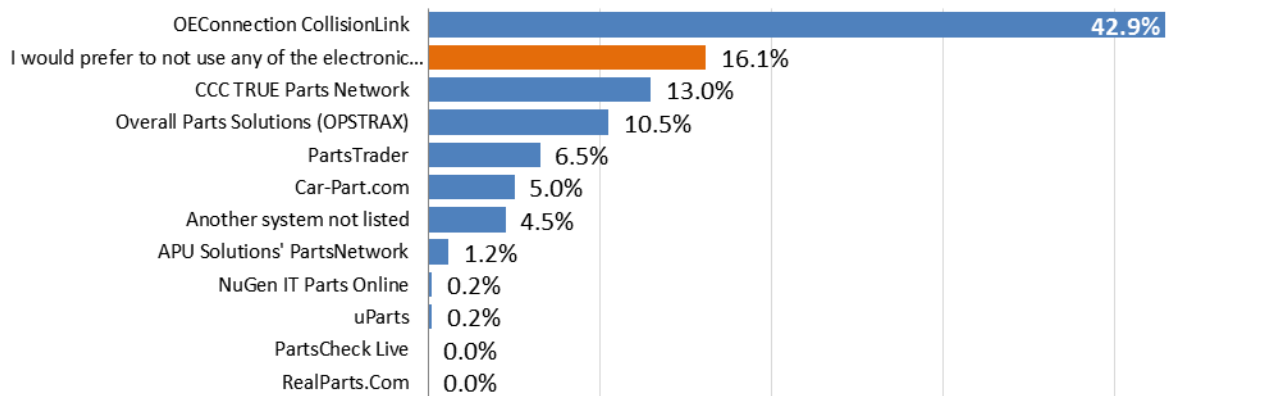
Of those, **96.2%** are using two or more different systems

Note: Total adds up to more than 100% due to shops having multiple systems installed

Notes from Mike: Although the percentage of shops that say they would prefer not to use ANY of the available systems has fallen to 16 percent – a significant decline from 31 percent two years ago – it still indicates that nearly 1-in-6 shops find none of the current systems are meeting their needs.



Assuming you could use any electronic parts system at your facility, for any insurance company, which system would be your PREFERRED system overall?



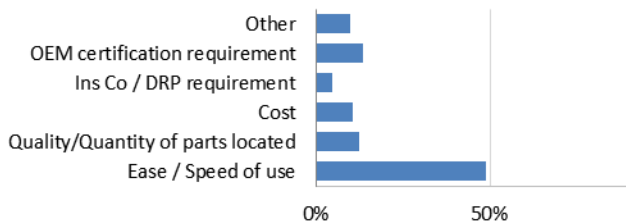
16% of shops would prefer not to use any of the systems currently available (down from 17% in 2017 and 31.2% in 2016)

Electronic parts systems

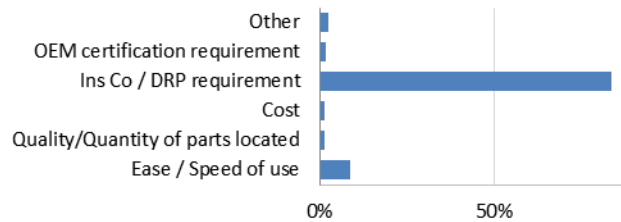
Indicate the PRIMARY reason you chose to use each of the electronic parts systems in use at your facility

NOTE: Charts provided for the seven systems most commonly in use in 2018.

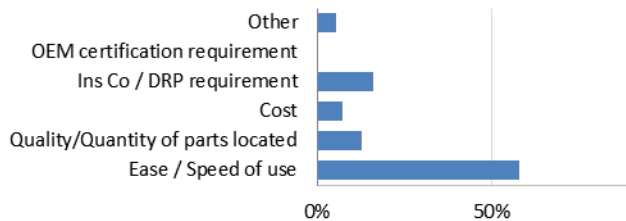
OEConnection CollisionLink



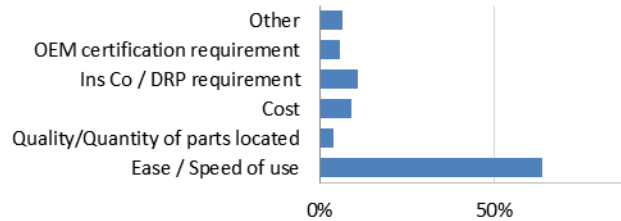
PartsTrader



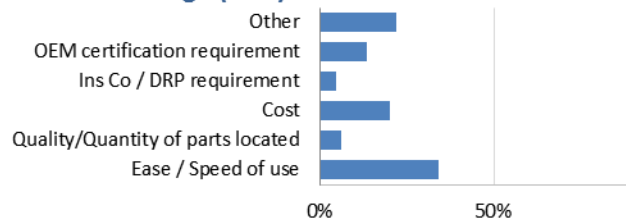
Car-Part.com



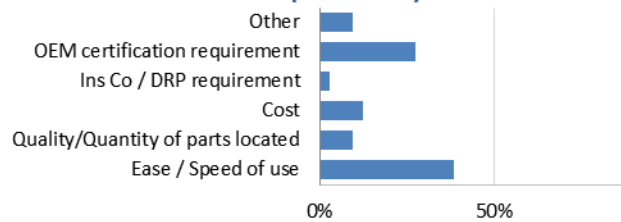
CCC TRUE Parts Network



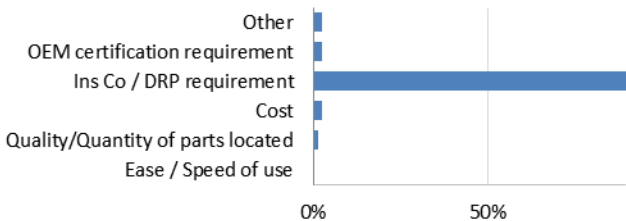
Auto PartsBridge (APB)



Overall Parts Solutions (OPSTRAX)



APU Solutions' PartsNetwork



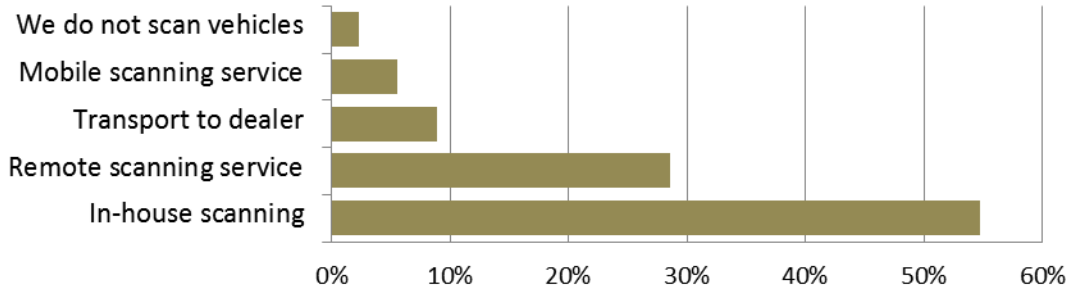
Insurance company requirements appear to be the main driver behind the use of some parts systems

Notes from Mike: *It is my belief that insurers should have an open platform that allows a shop to use whatever software they prefer. Parts vendors are feeling the financial pressures of having to "pay-to-play" with multiple vendors, and eventually are going to have to make decisions on which system they participate in.*

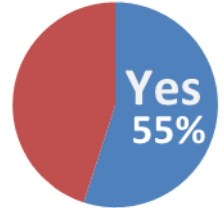


Scanning rates

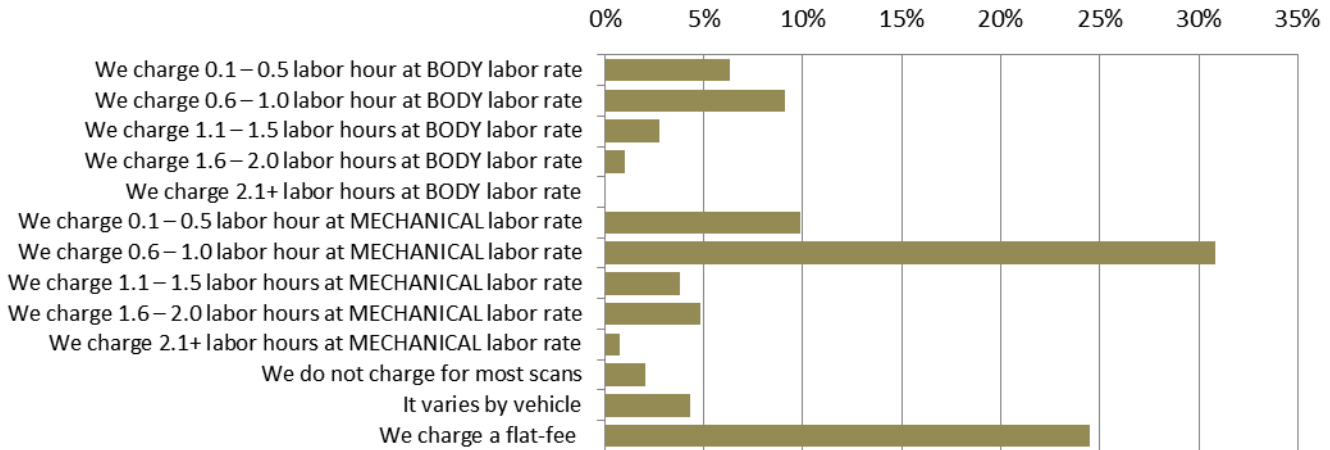
Select the MOST COMMON method you use to scan vehicles (pre- or post-repair).



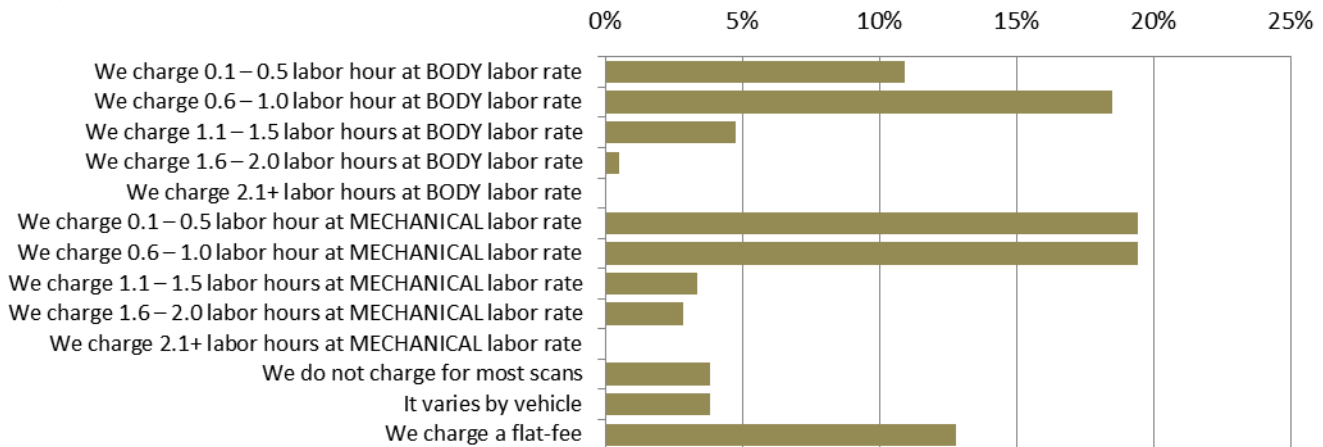
When you transport vehicles to a dealership to be scanned, do you charge labor time for transporting the vehicle?



How do you MOST COMMONLY charge for an in-house scan?

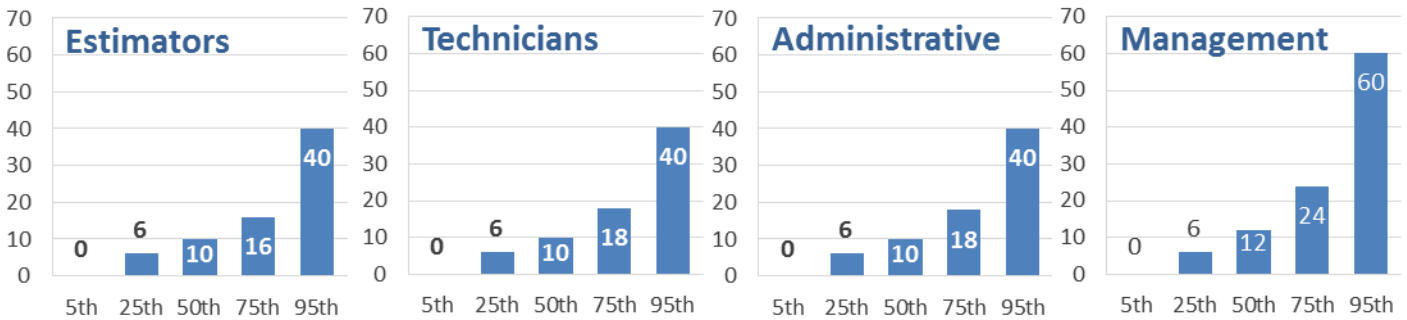


When you use a remote scanning service, how do you MOST COMMONLY charge for your labor (i.e., hooking up the vehicle) for a scan?



Training

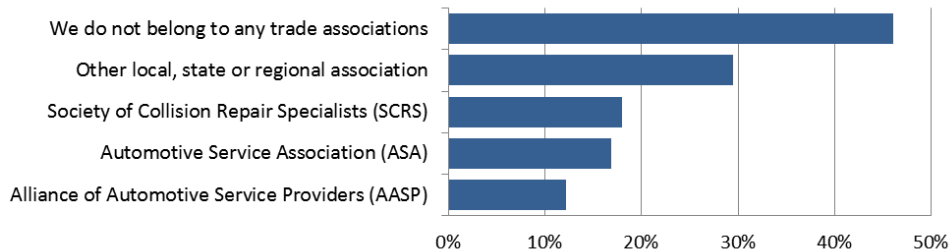
Shops were asked how many hours of formal training each type of employee receives annually, including training from I-CAR, paint companies, the OEMs or other suppliers. It appears that most employees receive a similar amount of training, though estimators receive the least; an estimator completing 16 hours of training in a year is receiving more training than those at 75 percent of all other shops. Shops in the top 5 percent (the 95th percentile) are offering more than double the annual training as even those shops in the 75th percentile.



Notes from Mike: Shops need to take the cost of training into account when establishing their labor rates as I believe the investment in training will increase in the years to come because of the rapid changes and complexity in vehicle design and technology.



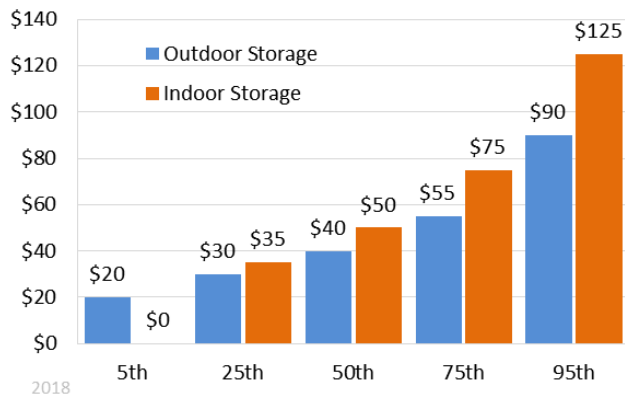
Association membership



Storage rates

The posted daily INDOOR and OUTDOOR storage rates at this location:

Range of Storage Rates 2018

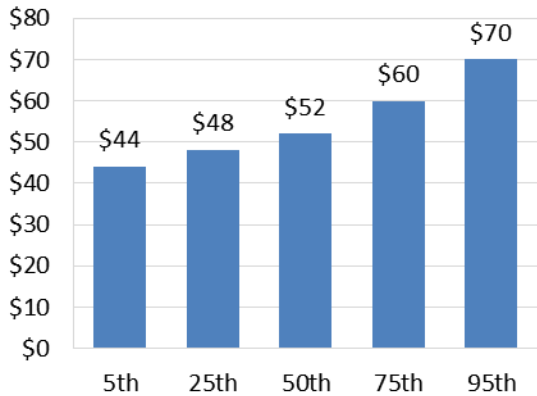


The chart to the left expresses indoor and outdoor storage rates as percentile groups.

Each percentile group shows the dollar amount that the specified percentage of respondents falls above/below. For example, the chart shows that the 25th percentile for indoor storage is \$35, which means that 25 percent of respondents charge less than \$35, and the other 75 percent charge more than \$35 per day. As another example, \$75 falls at the 75th percentile for indoor storage, meaning 75 percent of all shops in the country charge \$75 or less, yet another 25 percent of shops charge more than \$75 per day for indoor storage.

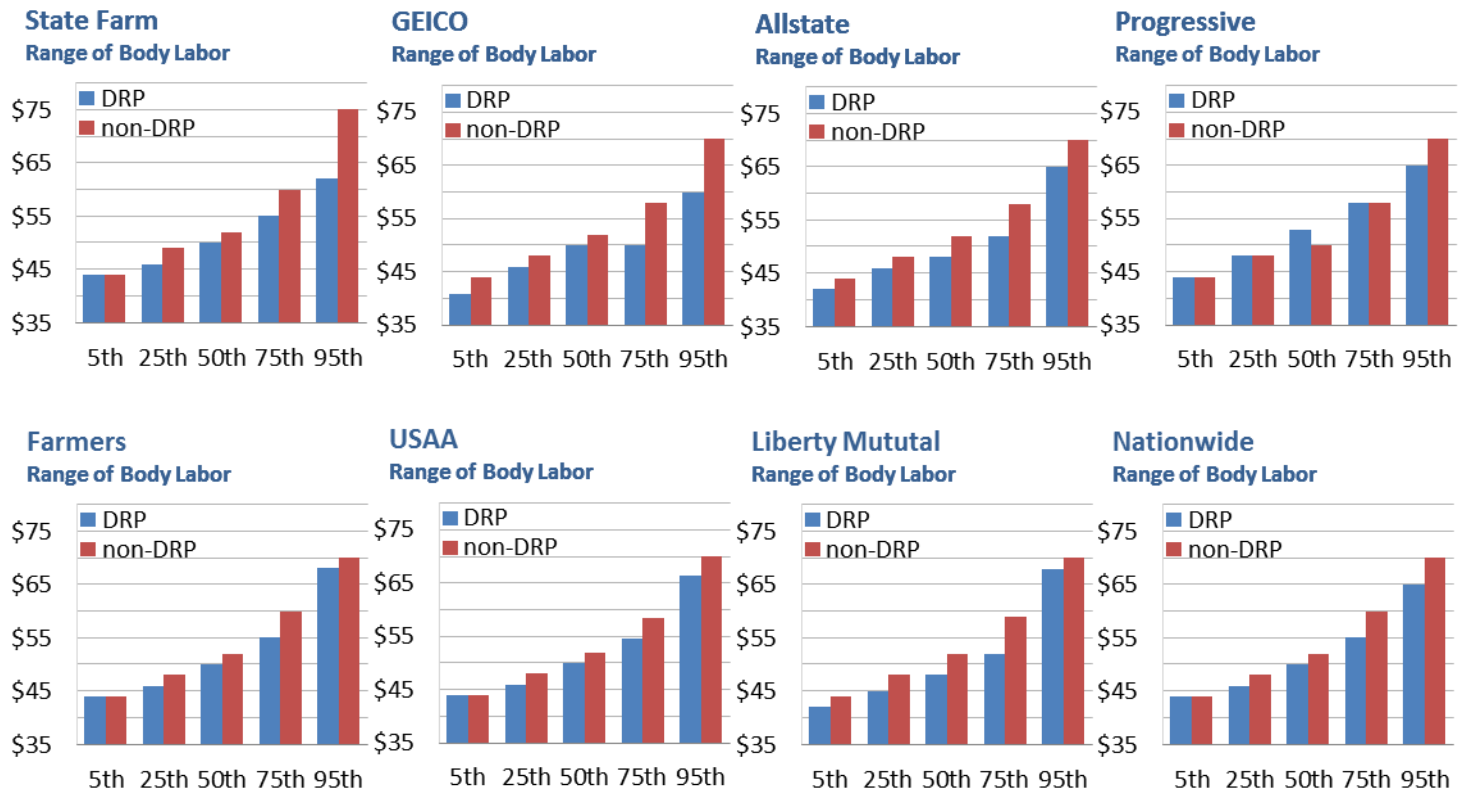
Body labor rates

Range of Non-DRP Body Rates

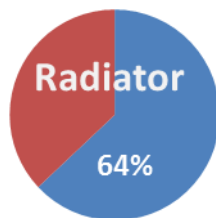


The chart at left shows the range of actual body repair rates across all eight insurers, for repairers who are not DRP participants with those insurers. Each percentile group shows the dollar amount that the specified percentage of respondents falls above/below. For example, the chart shows that \$48 per hour falls at the 25th percentile, which means that 25 percent of respondents charge less than \$48, and the other 75 percent charge more than \$48 per hour. As another example, \$60 per hour falls at the 75th percentile, meaning 75 percent of all shops in the country charge less than this, yet another 25 percent of shops charge more than \$60 per hour. Also, if a shop is charging \$44 per hour, then only 5 percent of shops charge less than this, and 95 percent charge more.

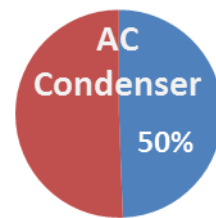
Actual hourly body repair rates for each insurer:



Body labor vs mechanical labor



How are you paid to perform an R&I or R&R?
Body Labor or
Mechanical Labor



RESOURCES

These suggestions are by no means meant to be an exhaustive list of all resources available on the topic. They are meant to give you an idea of the types of resources available and some of the places to look for them.

Articles

MATCH OE QUALITY DURING SOUNDPROOFING REPLACEMENT

SearchAutoParts (September 21, 2016) - [Website](#)

ANDERSON SHOWS NORTHEAST SHOPS HOW HIS “WHO PAYS FOR WHAT?” SURVEYS CAN HELP

AutobodyNews (April 8, 2016) - [Website](#)

THE DASH LIGHT MYTH

ABRN (August 8, 2013) - [Website](#)

RECYCLING A PART REQUIRES ADDED PROCEDURES

ABRN (June 11, 2012) - [Website](#)

DETERMINING THE COST OF DOING BUSINESS

ABRN (May 16, 2012) - [Website](#)

OEM/Supplier Information

These are just a few of the videos available from 3M™ Collision Repair at <http://3mcollision.com/library/videos>

Seam Sealer Matching Made Easy - [Video from 3M](#)

How to match OEM Textured Seam Sealers - [Video from 3M](#)

Matching OEM Seam Sealer and Texture in A Wheel House - [Video from 3M](#)

Tech Tip: Matching OEM Seam Sealer in Corner Applications - [Video from 3M](#)

Weld Through Seam Sealer Application STRSW - [Video from 3M](#)

Matching Special OEM Seam Sealer Applications: Door Skin Seams - [Video from 3M](#)

Matching OEM Sound Deadening - [Video from 3M](#)

Matching OEM Sound Deadening Pads or Texture - [Video from 3M](#)

3M Collision Repair Tech Tips - Replacing and Replicating Sound Deadener - [Video from 3M](#)

3M How To: Replace Sound Deadening products - [Video from 3M](#)

Off Vehicle Restoration of Sound Deadener in Collision Repair - [Video from 3M](#)

Restoring Corrosion Protection with Cavity Wax - [Video from 3M](#)

Introducing Cavity Wax Plus - [Video from 3M](#)

3M Collision Repair Tech Tips - Restore Undercoatings, Proper Corrosion Protection - [Video from 3M](#)

3M Repair Application and Job Cost Guide - Microsoft Excel Spreadsheet - [CollisionAdvice website](#)

3M 2015 Accurate Cost Estimating (ACE) Tool - Microsoft Excel Spreadsheet - [CollisionAdvice website](#)

I-CAR Repairability Technical Support Portal - OEM tech articles, bulletins, position statements - [I-CAR website](#)

Car Manufacturer technical information websites - [OEM 1STOP website](#)

OEM Documentation and Position Statements - Collision Advice website - [Collision Advice website](#)

Database Enhancement Gateway

“Estimate Toolbox” section on the DEG website contains a copy of the estimating guides (often referred to as “P-pages”) for all the estimating systems:

[AudaExplore](#)

[CCC Information Systems](#)

[Mitchell International](#)

Automotive Service Association

Reference Chart of Not-Included Operations When Installing New Replacement Parts – [Free Tools from ASA](#)

Reference Chart of Not-Included Operations When Installing LKQ Parts – [Free Tools from ASA](#)

Society of Collision Repair Specialists

Guide to Complete Repair Planning - [publication online](#)

OEM Technical Info by Automaker - [SCRS website](#)

Collision Advice Negotiation Best Practices

❖ Visit the [CollisionAdvice website](#) to download free negotiation best practices guides

Mike Anderson Seminar Programs

❖ Visit the [CollisionAdvice website](#)

CRASH Network

For regular coverage of survey results including additional analysis of the data and topics covered in the survey.

[CRASH Network Website](#)

SPONSOR

The results of this survey are being made available to repair facilities at no cost thanks to the generous support of



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