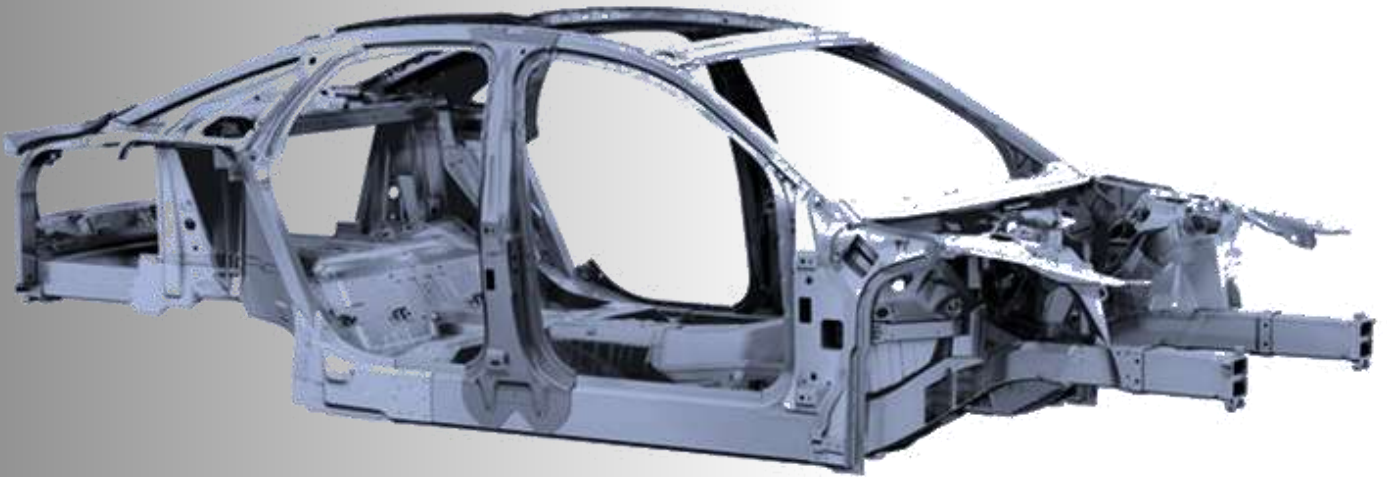




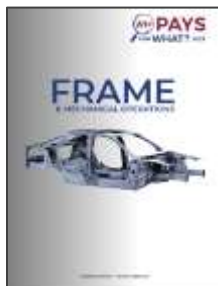
# FRAME

& MECHANICAL OPERATIONS



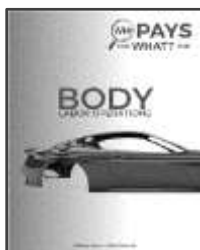
## There are four different annual surveys in the "Who Pays for What?" series.

This report contains the results of the survey covering  
frame and mechanical operations conducted in April of 2024.



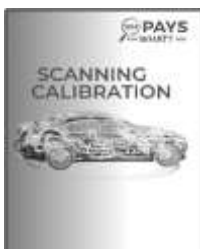
Second quarter

### Frame & Mechanical Operations



Third quarter

### Body Labor



Fourth quarter

### Scanning & Calibration



First quarter

### Refinish Operations

## Become a survey participant

To sign up to participate in future surveys visit [www.crashnetwork.com/collisionadvice](http://www.crashnetwork.com/collisionadvice)

## Get past survey results

To obtain results from prior surveys, visit [www.crashnetwork.com/collisionadvice](http://www.crashnetwork.com/collisionadvice)

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### Who conducted this survey?

**CollisionAdvice** ([www.CollisionAdvice.com](http://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](http://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

I genuinely 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 and estimate line-items we cover throughout the year.



Our goal has always been to help shops become aware of the not-included procedures they are doing or materials they are using and understand how often other shops are being compensated for them. There are several operations in this survey that saw payment frequency changes, both up and down. Many of them, however, are within the survey's margin of error and should not be interpreted as a meaningful change.

In general, the multi-year trend has been an increasing number of shops negotiating and being paid for these "not-included" procedures. And that's the whole reason we are doing this!

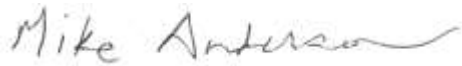
Please continue to participate in these surveys, and encourage other shops to do so. The more participation we have, the more accurate the results. I can't wait to see what the results will look like in five more years!

**Share your thoughts with us.**

You can email us at

[tiffany@collisionadvice.com](mailto:tiffany@collisionadvice.com)

Thanks again for supporting this effort to improve our industry.



Mike Anderson

President, CollisionAdvice

[www.CollisionAdvice.com](http://www.CollisionAdvice.com)

#### 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](http://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 October. It will cover "not included" repair procedures related to vehicle scanning, calibration and aluminum repair operations.

Purpose and Methodology

In 2015, Collision Advice and CRASH Network launched this 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 quarter’s survey, which ran throughout July, asked body shops nationwide to report how often they are paid for a variety of frame and mechanical repair operations by the eight largest auto insurers. The other surveys in the series examine procedures related to body repair, scanning and calibration 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 20,000 individuals in the industry. 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."

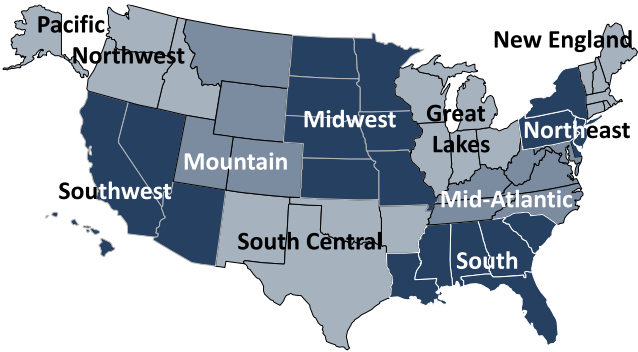
Respondents

The survey received responses from 683 collision repair facilities. Shops of all types (see shop type table) and from all 50 states (see table on following page) participated in the survey. In addition, respondents were asked to provide their DRP status with each insurer. The following DRP participation rate was recorded for each insurer.

Shop Type	Count	%
Independent	426	62%
Dealership	108	16%
Multi-shop	99	14%
Franchise	50	7%

Insurer	State Farm	Nationwide	Allstate	Farmers	Progressive	USAA	Liberty Mutual	Geico	None
Shops in DRP	35%	16%	16%	14%	11%	10%	9%	8%	50%

A regional breakdown is also provided for each repair procedure based on the 10 regions below, with the number of respondents from each region shown to the right.



Region	Count
Great Lakes	126
Mid-Atlantic	65
Midwest	78
Mountain	53
New England	32
Northeast	79
Pacific Northwest	39
South	73
South Central	67

Margin of Error

Assuming a nationwide repair facility population of approximately 40,000 (based on U.S. Census Bureau and National Automotive Dealers Association data) the survey results have a minimum margin of error of +/- 3.7% with a 95% confidence level on questions involving all respondents. This means that, if 30% of respondents overall said they are paid "always" or "most of the time" for a procedure, we can say with 95% confidence that between 26% and 34% of facilities are actually paid "always " or "most of the time" for that procedure. This margin of error will increase to a varying degree due to smaller sample sizes and population size changes in the result breakdowns – particularly in the regional breakdowns and DRP vs. non-DRP comparisons.

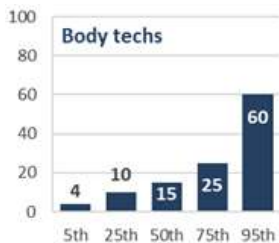
## INTRODUCTION

### How to read the survey results

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," "some of the time," and "never." These columns do not include those who said they "never asked" and should be interpreted as, "Of those facilities that do negotiate for this procedure, this percent is paid at this frequency." The "never asked" column 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.



**Percentiles:** This report expresses some results in percentiles, rather than a simple "average" response. Each percentile group (for example 5<sup>th</sup>, 25<sup>th</sup>, 50<sup>th</sup>, etc.) represents the value that the specified percentage of respondents falls below. For example, a result of 60 in the 95<sup>th</sup> percentile means that 95% of the responses were below 60, and just 5% of the responses were higher than 60.

**Speedometer:** At the top of each repair procedure section, you will see a "speedometer" graph that shows the percentage of shops who are paid for the procedure "most" or "all" of the time. The arrow indicates the percentage change from the prior year. Keeping in mind our margin of error, only changes that exceed that margin 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.



### 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 when they include it on their estimates, yet another 20% 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](mailto:info@crashnetwork.com) with any comments, questions, concerns or suggestions.

Shops from  
50 states  
participated in  
this survey

State	Count
AK	3
AL	5
AR	9
AZ	14
CA	47
CO	10
CT	14
DC	0
DE	1
FL	29
GA	25
HI	6
IA	21
ID	11
IL	32
IN	15
KS	15
KY	6
LA	3
MA	7
MD	5
ME	1
MI	28
MN	30
MO	10
MS	6
MT	8
NC	22
ND	2
NE	8
NH	2
NJ	17
NM	3
NV	4
NY	32
OH	17
OK	7
OR	11
PA	29
RI	7
SC	5
SD	7
TN	15
TX	48
UT	31
VA	16
VT	1
WA	14
WI	19
WV	1
WY	4
<b>TOTAL</b>	<b>683</b>

## 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, Mitchell TechAdvisor, CCC ONE Repair Methods, I-CAR's Repairability Technical Support Portal, etc. 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, like 3M's Collision Repair Materials Planner (CRiMP) tool, 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 to just about any line item on your estimate. Arm your estimators with the tools and resources needed to answer those questions and you can be among the shops successfully being paid for many of the procedures in this survey.

Lastly, be sure to check out the "Resources" listed at the end of this report for some other sources of help.

*Mike Anderson*

-Mike Anderson



## Database Enhancement Gateway (DEG)

The Database Enhancement Gateway (DEG) has provided 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.

The 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

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 (Audatex, CCC, and Mitchell) 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	<a href="#">Link to DEG</a>
8581	Audatex	<a href="#">Link to DEG</a>
17616	Mitchell	<a href="#">Link to DEG</a>

Clicking on the link for a procedure will bring you directly to the DEG website where you can read the full explanation by the information provider involved. In the example below, 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

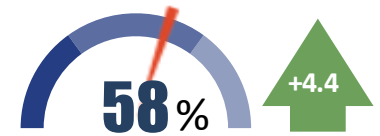
The following repair operations are included in this survey.

Repair operation	Description
<b>Pre-measure to diagnose structural damage</b>	Measuring the vehicle prior to repairs to determine extent of damage.
<b>Remove coatings from pinch welds &amp; repair 'witness marks' after clamp removal</b>	Labor to remove undercoating/seam sealer from pinch welds prior to clamping vehicle for anchoring, and to repair "witness marks" (clamp damage) after removing clamps (does not include refinish labor).
<b>Destructive testing of welds</b>	Make test welds and perform destructive testing on them prior to welding on vehicle to ensure welder is set up properly.
<b>Mobilize vehicle</b>	Labor required to transport non-drivable vehicle into/around the shop through the use of wheel dollies or other means.
<b>Pre-diagnostic alignment</b>	Conduct an alignment prior to repairs to determine if any suspension components will be needed as part of the repair.
<b>R&amp;I of electrical components</b>	Removal and reinstallation (or partial set-back beyond 12-20 inches) of electrical components from areas on the vehicle on which welding will occur during repairs to prevent damage from electromagnetic pulse (EMP).
<b>Stall cure time</b>	Fee for the time (in some cases 36 to 48 hours) during which a vehicle must remain stationary to allow structural / adhesive bonding to cure.
<b>Final verification of measurements</b>	Final check and print-out of measurements following completion of repairs.
<b>Clear personal data</b>	Labor to erase customer's personal data (such as garage door code, GPS data, data from a synched cell phone, etc.) from a vehicle that has been declared a total loss.
<b>Disconnect and reconnect battery when performing repairs</b>	Disconnect battery prior to repairing a vehicle, and reconnect the battery after repairs are complete.
<b>Battery reconnect procedures</b>	Perform all procedures required by the OEM after a battery has been disconnected and reconnected (i.e. initializations, steering angle sensor, etc.).
<b>Administrative fee for re-keying estimate</b>	A fee for the administrative time required to enter an insurer-prepared estimate into the shop's estimating system or to reconcile insurer estimate and shop estimate.
<b>Administrative fee for total losses</b>	A fee for the administrative time required to generate an estimate, valuation report or other paperwork related to a vehicle declared a total loss rather than being repaired.
<b>Transport vehicle to sublet service provider</b>	Towing costs or labor to drive the vehicle to/from dealership or other sublet provider
<b>Tire run-out test</b>	Use a gauge or wheel balancer to check tires for flat spots.
<b>Parts cart storage</b>	Fee for space required for carts holding parts removed from vehicles that are subsequently declared total losses.
<b>Jig rental</b>	Fee for short-term use of a needed jig or fixture for measuring a particular vehicle using a bench system.
<b>Jig assembly</b>	The labor time spent assembling a jig prior to installation.
<b>Photo-based estimate</b>	Preparing a photo-based estimate at the insurer's request.

## REPAIR OPERATIONS

### Pre-measure to diagnose structural damage

Of those that negotiate for this, 58% are paid "always" or "most of the time."

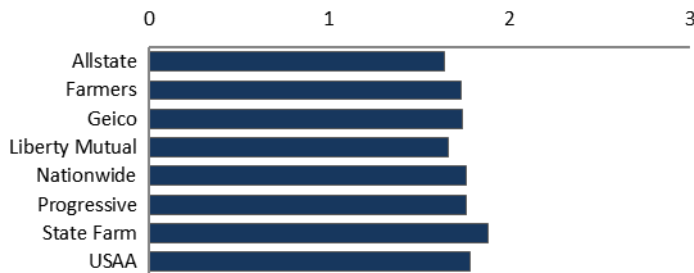


**Operation:** Measuring the vehicle prior to repairs to determine extent of damage.

#### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	28.0%	25.1%	29.3%	17.6%	20.8%	518
Farmers	30.2%	26.7%	28.9%	14.2%	22.9%	485
Geico	30.6%	28.2%	25.5%	15.8%	20.5%	518
Liberty Mutual	30.8%	23.5%	26.6%	19.1%	22.2%	492
Nationwide	32.2%	27.9%	24.1%	15.8%	22.5%	481
Progressive	32.1%	26.7%	26.5%	14.7%	19.9%	537
State Farm	37.6%	26.7%	22.0%	13.8%	19.1%	556
USAA	34.2%	24.1%	26.9%	14.8%	21.0%	504

Pre-measure to diagnose structural damage - 2024



Pre-measure to diagnose structural damage - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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



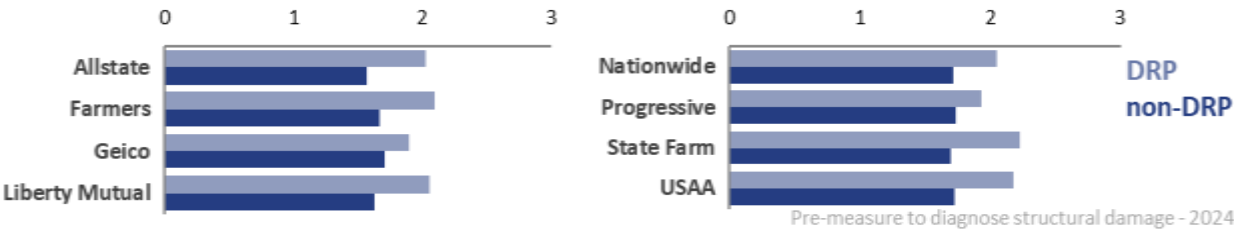
Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	27.6%	27.2%	25.7%	19.5%	27.6%	721
Mid-Atlantic	30.0%	26.2%	31.9%	11.8%	17.0%	377
Midwest	23.0%	34.2%	25.2%	17.6%	37.1%	442
Mountain	17.0%	32.2%	28.4%	22.5%	12.7%	331
New England	48.4%	23.6%	27.4%	0.6%	16.0%	187
Northeast	34.1%	27.2%	27.2%	11.6%	18.8%	499
Pacific Northwest	42.5%	28.5%	17.4%	11.6%	18.5%	254
South	39.0%	13.3%	25.2%	22.4%	11.6%	475
South Central	32.0%	24.9%	26.5%	16.6%	19.8%	405
Southwest	36.3%	28.3%	24.8%	10.5%	21.5%	400

Pre-measure to diagnose structural damage - 2024

Pre-measure to diagnose structural damage

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	36.9%	36.9%	16.9%	9.2%	21.7%	83
Farmers	40.4%	38.6%	10.5%	10.5%	18.6%	70
Geico	38.7%	22.6%	29.0%	9.7%	24.4%	41
Liberty Mutual	45.9%	24.3%	18.9%	10.8%	22.9%	48
Nationwide	37.1%	38.7%	16.1%	8.1%	23.5%	81
Progressive	37.0%	37.0%	8.7%	17.4%	16.4%	55
State Farm	53.5%	25.4%	11.3%	9.9%	21.5%	181
USAA	50.0%	27.5%	12.5%	10.0%	24.5%	53
Non-DRP						
Allstate	26.2%	23.9%	30.7%	19.1%	21.0%	391
Farmers	28.5%	25.4%	30.3%	15.8%	24.3%	375
Geico	29.5%	29.2%	24.0%	17.3%	20.8%	432
Liberty Mutual	29.4%	24.0%	26.5%	20.1%	22.5%	404
Nationwide	31.4%	27.1%	23.6%	17.9%	22.7%	362
Progressive	31.2%	26.3%	28.0%	14.5%	20.6%	436
State Farm	28.9%	28.6%	25.9%	16.5%	18.2%	325
USAA	32.3%	24.2%	27.6%	15.8%	21.1%	408

Pre-measure to diagnose structural damage - 2024

As we see ADAS become more prevalent, it is critical to pre-measure the vehicle because any minor misalignments can affect the ADAS accuracy. I believe pre-measuring a vehicle to diagnose the damage has become as critical as pre-repair scanning of a vehicle. Nissan/Infiniti, for example, has a [position statement](#) on this, and the OEM repair procedures for some Honda vehicles state that rear damage requires that the entire vehicle be measured.

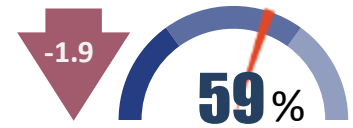
Notes from Mike



DEG Tracking #	Information Provider	Inquiry Details
12205	Audatex	<a href="#">Link to DEG inquiry result</a>
6608	CCC	<a href="#">Link to DEG inquiry result</a>
11073	Mitchell	<a href="#">Link to DEG inquiry result</a>

## Remove coatings from pinch-welds, repair "witness marks"

*Of those that negotiate for this, 59% are paid "always" or "most of the time."*

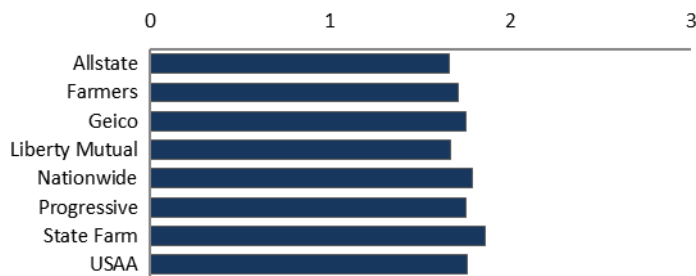


**Operation:** Labor to remove undercoating/seam sealer from pinch-welds prior to clamping vehicle for anchoring, and to repair "witness marks" (clamp damage) after removing clamps (does not include refinish labor).

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	29.6%	25.3%	26.3%	18.9%	24.2%	517
Farmers	28.7%	28.7%	27.3%	15.2%	25.5%	486
Geico	30.4%	28.6%	27.0%	14.0%	24.7%	511
Liberty Mutual	28.7%	26.8%	27.0%	17.5%	24.7%	486
Nationwide	32.0%	29.2%	24.4%	14.4%	26.2%	478
Progressive	31.1%	27.9%	26.2%	14.8%	23.6%	530
State Farm	36.2%	27.1%	23.4%	13.3%	22.0%	549
USAA	31.2%	27.2%	28.3%	13.2%	25.0%	504

Remove coatings from pinch-welds, and repair - 2024

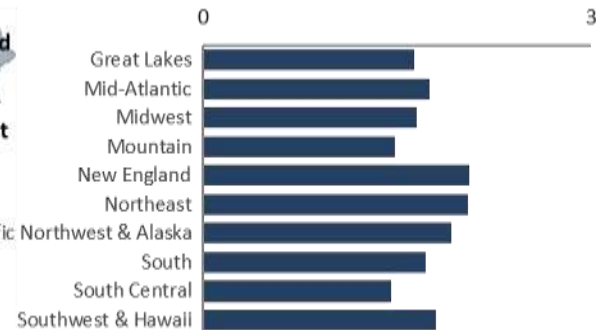


Remove coatings from pinch-welds, and repair - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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



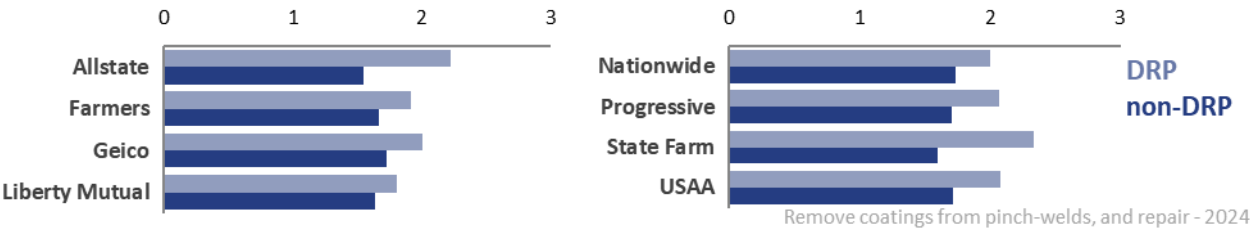
Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	29.4%	23.7%	27.8%	19.1%	29.8%	717
Mid-Atlantic	27.6%	29.4%	33.1%	9.9%	23.3%	382
Midwest	24.2%	27.8%	37.2%	10.8%	38.7%	452
Mountain	22.6%	24.8%	30.4%	22.2%	27.7%	318
New England	43.2%	26.6%	23.1%	7.1%	8.6%	185
Northeast	38.5%	34.0%	21.4%	6.1%	13.7%	497
Pacific Northwest	31.1%	41.1%	16.3%	11.5%	17.7%	254
South	35.8%	20.2%	24.3%	19.7%	16.8%	470
South Central	24.5%	23.4%	25.2%	26.9%	27.4%	394
Southwest	33.0%	29.8%	22.0%	15.2%	28.1%	392

Remove coatings from pinch-welds, and repair - 2024

Remove coatings from pinch-welds, 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.



DRP	Always	Most of the time	Some of the time	Never	Never asked	Responses
Allstate	55.6%	19.0%	17.5%	7.9%	23.2%	82
Farmers	40.4%	25.0%	21.2%	13.5%	23.5%	68
Geico	35.5%	38.7%	16.1%	9.7%	22.5%	40
Liberty Mutual	44.4%	13.9%	19.4%	22.2%	18.2%	44
Nationwide	42.9%	27.0%	17.5%	12.7%	22.2%	81
Progressive	45.7%	26.1%	17.4%	10.9%	17.9%	56
State Farm	57.6%	23.6%	13.9%	4.9%	20.0%	180
USAA	50.0%	20.0%	17.5%	12.5%	21.6%	51
Non-DRP						
Allstate	24.6%	26.3%	28.7%	20.5%	25.1%	391
Farmers	26.7%	29.6%	27.4%	16.2%	26.5%	377
Geico	30.2%	27.4%	27.7%	14.8%	25.5%	427
Liberty Mutual	27.2%	27.2%	27.9%	17.6%	25.7%	405
Nationwide	30.2%	29.4%	25.2%	15.3%	27.4%	361
Progressive	29.3%	28.0%	27.4%	15.3%	24.8%	427
State Farm	25.0%	28.7%	27.9%	18.4%	24.0%	321
USAA	28.6%	28.3%	29.3%	13.8%	26.0%	411

Remove coatings from pinch-welds, and repair - 2024

Remember, failure to secure a fixture clamp to pinchwelds without first removing all undercoating and seam sealer when called for by the automaker increases the likelihood that the vehicle can slip when you are pulling it, causing further damage or adversely impacting the accuracy of the measurements. So those coatings need to be removed in order to perform a proper and safe repair. Toyota, for example, very clearly states this in its published repair procedures as well as in a CRIB bulletin; Nissan also came out with a position statement on this procedure. Other OEMs will address this within their repair manual. The repair after clamp removal is sometimes referred to as repair of "witness marks."

While it is good to see that shops are getting reimbursed for this, what is concerning for me are the number of photos that I see on shops' social media that show vehicles being anchored in ways that are NOT approved by the automaker. Not all OEMs allow a shop to anchor a vehicle on the pinchwelds, and it is CRITICAL that shops do the research to determine what is and is not permitted for a safe and proper repair on each vehicle.

Here's a link to an [SCRS "Quick Tip" video](#) on this topic.

Notes from  
Mike

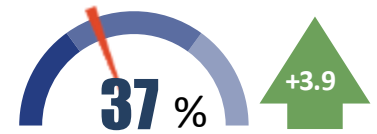


DEG Tracking #	Information Provider	Inquiry Details
11628	CCC	<a href="#">Link to DEG inquiry result</a>
10501	Audatex	<a href="#">Link to DEG inquiry result</a>



## Destructive testing of welds

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

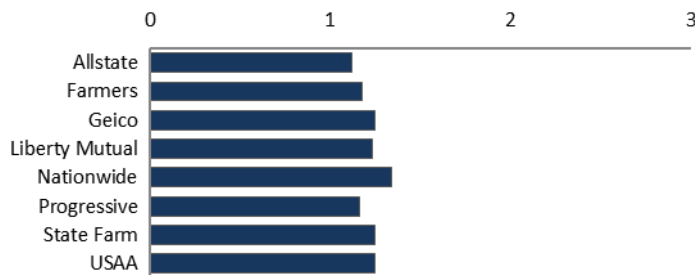


**Operation:** Make test welds and perform destructive testing on them prior to welding on vehicle to ensure welder is set up properly.

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	14.3%	17.8%	33.6%	34.3%	37.9%	517
Farmers	15.8%	19.2%	32.0%	33.0%	39.5%	491
Geico	15.8%	23.3%	31.4%	29.5%	37.2%	513
Liberty Mutual	16.9%	20.9%	30.1%	32.1%	38.5%	491
Nationwide	19.3%	23.8%	28.6%	28.3%	39.2%	477
Progressive	16.5%	18.0%	30.0%	35.5%	38.0%	527
State Farm	20.7%	18.7%	25.4%	35.3%	37.2%	546
USAA	17.3%	19.5%	33.9%	29.4%	38.5%	509

Destructive testing of welds - 2024



Destructive testing of welds - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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



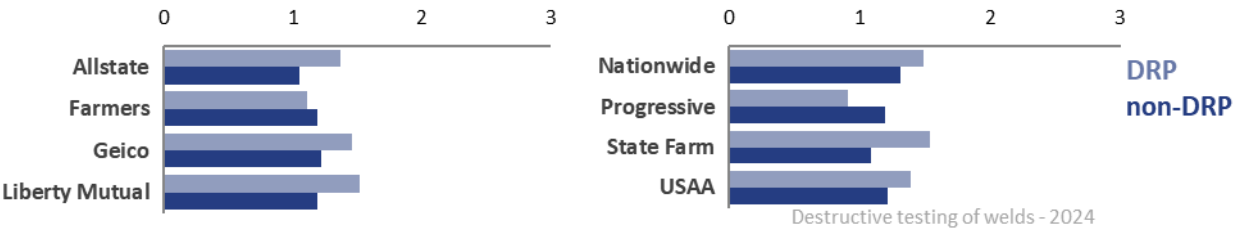
Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	9.5%	24.6%	26.1%	39.8%	49.5%	707
Mid-Atlantic	14.1%	19.7%	40.1%	26.0%	28.6%	377
Midwest	15.4%	21.5%	34.4%	28.7%	57.0%	453
Mountain	9.0%	22.0%	33.5%	35.5%	26.6%	334
New England	19.6%	14.7%	33.3%	32.4%	38.2%	165
Northeast	27.2%	19.8%	24.7%	28.3%	30.8%	526
Pacific Northwest	22.0%	26.6%	37.6%	13.9%	29.4%	245
South	22.9%	7.0%	29.3%	40.8%	32.5%	465
South Central	20.7%	19.0%	28.1%	32.2%	38.9%	396
Southwest	10.6%	26.4%	27.6%	35.4%	37.0%	403

Destructive testing of welds - 2024

Destructive testing of welds

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%	28.3%	30.0%	25.0%	27.7%	83
Farmers	15.6%	22.2%	20.0%	42.2%	35.7%	70
Geico	12.5%	45.8%	16.7%	25.0%	40.0%	40
Liberty Mutual	27.6%	24.1%	20.7%	27.6%	39.6%	48
Nationwide	18.2%	34.5%	25.5%	21.8%	32.1%	81
Progressive	6.3%	21.9%	28.1%	43.8%	39.6%	53
State Farm	30.0%	20.0%	23.6%	26.4%	39.2%	181
USAA	15.8%	28.9%	34.2%	21.1%	28.3%	53
Non-DRP						
Allstate	13.3%	14.9%	35.7%	36.1%	39.0%	395
Farmers	15.6%	18.6%	35.0%	30.8%	38.6%	386
Geico	14.9%	21.5%	34.2%	29.5%	36.3%	432
Liberty Mutual	15.4%	20.5%	31.9%	32.3%	37.4%	406
Nationwide	19.0%	22.2%	29.2%	29.6%	40.0%	360
Progressive	17.6%	17.6%	30.8%	34.1%	36.8%	432
State Farm	14.8%	18.7%	26.8%	39.7%	34.9%	321
USAA	17.1%	17.5%	35.0%	30.4%	38.5%	418

Destructive testing of welds - 2024

This is very important!

Notes from  
Mike



While the percentage of shops getting reimbursed for this has been increasing for the past few years, just 37% being paid regularly is still very, very concerning. We need to WAKE UP on this one. This is a non-negotiable procedure. EVERY OEM states that we need to do this (though the actual testing process itself will vary by OEM). If your techs aren't doing this, don't delay, get them doing it today!

A proper weld involves so many factors (the correct type of welder, at the correct settings, with the correct wire, and the correct gas mixture) that it is nearly impossible to tell if the settings are correct without first performing destructive test welds.

I would highly encourage shops to use an electronic quality control app to document via photos the test welds performed. I have seen some repaired cars with welds that could be popped loose simply by prying on them with a screwdriver. That is a scary situation that can be avoided by verifying the welder settings with a destructive test weld.

We at Collision Advice have asked I-CAR to develop a series of videos that technicians can watch in regard to OEM-specific destructive tests to ensure this critical step is performed properly. I recently was at a shop that set up and performed a destructive test weld that failed because the welding equipment did not have the latest software update. That was not the first time I've seen that happen. Be sure to check with your welder equipment company to know when any updates should be performed.

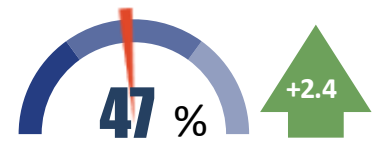


DEG Tracking #	Information Provider	Inquiry Details
12565	CCC	<a href="#">Link to DEG inquiry result</a>
11835	Mitchell	<a href="#">Link to DEG inquiry result</a>
11232	Audatex	<a href="#">Link to DEG inquiry result</a>



## Mobilize vehicle

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

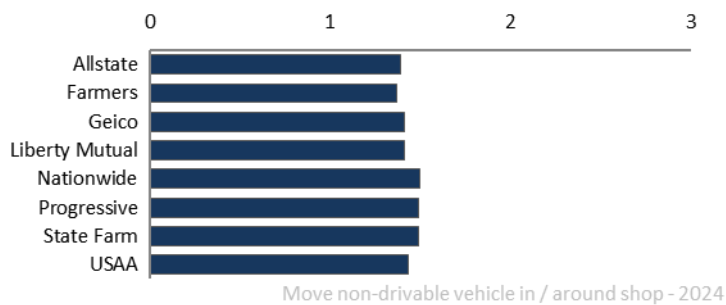


**Operation:** Labor required to transport non-drivable vehicle into/around the shop using wheel dollies or other means.

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	25.5%	17.7%	26.7%	30.0%	34.4%	508
Farmers	25.3%	18.3%	24.7%	31.7%	37.1%	477
Geico	25.9%	19.6%	24.1%	30.4%	34.5%	507
Liberty Mutual	26.8%	19.6%	21.5%	32.2%	34.4%	483
Nationwide	28.3%	20.7%	23.4%	27.6%	35.3%	470
Progressive	26.7%	22.6%	24.1%	26.7%	33.8%	521
State Farm	28.9%	19.7%	23.3%	28.1%	33.5%	541
USAA	26.2%	19.8%	24.7%	29.3%	34.8%	497

Move non-drivable vehicle in / around shop - 2024



Move non-drivable vehicle in / around shop - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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

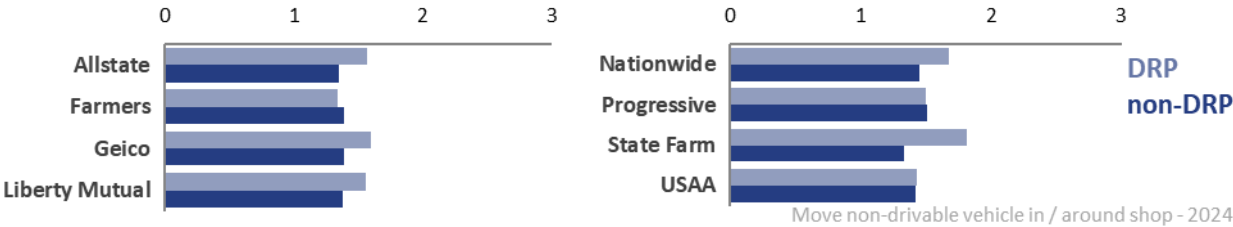


Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	28.1%	12.3%	25.2%	34.4%	42.9%	723
Mid-Atlantic	30.7%	11.1%	36.1%	22.1%	32.4%	361
Midwest	33.0%	22.3%	18.6%	26.0%	51.8%	446
Mountain	3.9%	19.9%	37.9%	38.3%	38.1%	333
New England	50.4%	29.1%	2.6%	17.9%	28.7%	164
Northeast	29.7%	30.9%	16.9%	22.5%	22.9%	507
Pacific Northwest	24.9%	19.9%	32.6%	22.7%	27.3%	249
South	36.7%	12.8%	13.8%	36.7%	19.7%	468
South Central	21.6%	16.4%	24.0%	38.0%	34.7%	383
Southwest	7.7%	31.5%	35.6%	25.2%	40.0%	370

Move non-drivable vehicle in / around shop - 2024

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	32.1%	19.6%	21.4%	26.8%	32.5%	83
Farmers	27.7%	17.0%	17.0%	38.3%	31.9%	69
Geico	28.0%	28.0%	20.0%	24.0%	37.5%	40
Liberty Mutual	33.3%	19.4%	16.7%	30.6%	23.4%	47
Nationwide	28.0%	32.0%	20.0%	20.0%	39.0%	82
Progressive	35.0%	20.0%	5.0%	40.0%	28.6%	56
State Farm	41.2%	19.3%	18.5%	21.0%	34.6%	182
USAA	24.3%	27.0%	16.2%	32.4%	27.5%	51
Non-DRP						
Allstate	24.7%	17.3%	26.3%	31.8%	35.3%	394
Farmers	25.8%	18.6%	24.2%	31.4%	37.9%	380
Geico	26.4%	18.3%	23.6%	31.7%	34.4%	433
Liberty Mutual	26.2%	19.2%	20.8%	33.8%	36.0%	406
Nationwide	28.8%	18.0%	22.7%	30.5%	34.9%	358
Progressive	26.5%	22.6%	25.8%	25.1%	34.3%	431
State Farm	22.7%	20.4%	24.1%	32.9%	33.1%	323
USAA	27.1%	18.4%	24.4%	30.1%	35.9%	415

Move non-drivable vehicle in / around shop - 2024

Notes from  
Mike

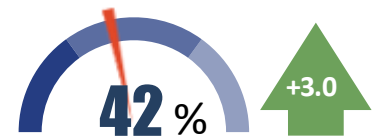
It's not uncommon for a vehicle to be towed into the shop that you can't start or drive. You may need to jack it up to put dollies underneath it, or it may require multiple people to push it into or around the shop. Recently I was in a shop where a technician had to go out and weld the tie-rod together just so they could move a vehicle into the shop. All of that is a not-included operation.



DEG Tracking #	Information Provider	Inquiry Details
20790	CCC	<a href="#">Link to DEG inquiry result</a>
20791	Mitchell	<a href="#">Link to DEG inquiry result</a>
20792	Audatex	<a href="#">Link to DEG inquiry result</a>

## Pre-diagnostic alignment

*Of those that negotiate for this, 42% are paid "always" or "most of the time."*

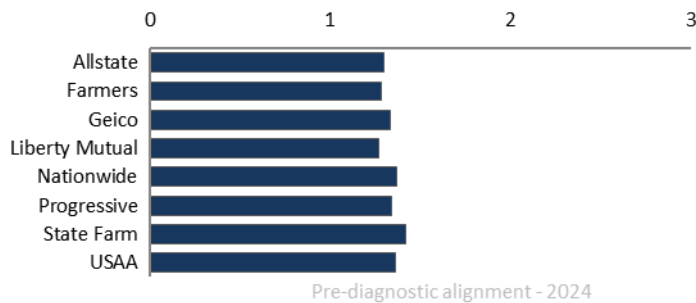


**Operation:** Conduct an alignment prior to repairs to determine if any suspension components will be needed as part of the repair.

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	21.3%	19.2%	27.5%	32.0%	33.5%	508
Farmers	20.3%	17.7%	31.3%	30.7%	34.8%	485
Geico	21.5%	21.8%	25.1%	31.6%	33.0%	506
Liberty Mutual	20.6%	18.7%	28.3%	32.4%	33.8%	485
Nationwide	22.7%	21.0%	27.2%	29.1%	34.3%	470
Progressive	21.8%	21.5%	26.1%	30.7%	32.8%	519
State Farm	25.3%	19.8%	26.4%	28.6%	32.0%	535
USAA	22.0%	20.2%	29.5%	28.3%	33.7%	501

Pre-diagnostic alignment - 2024



Pre-diagnostic alignment - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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

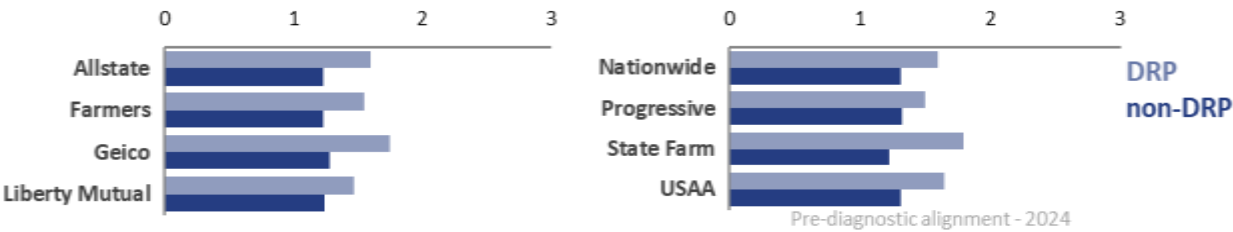


Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	17.1%	14.6%	26.6%	41.7%	50.0%	714
Mid-Atlantic	26.9%	20.5%	22.0%	30.7%	30.0%	377
Midwest	24.8%	26.5%	17.2%	31.5%	47.0%	449
Mountain	12.2%	16.0%	32.4%	39.4%	34.5%	325
New England	23.6%	22.0%	22.8%	31.7%	24.1%	162
Northeast	27.1%	21.3%	18.2%	33.4%	22.7%	511
Pacific Northwest	29.2%	23.2%	36.3%	11.3%	33.6%	253
South	14.8%	11.3%	41.4%	32.5%	17.9%	453
South Central	20.0%	22.6%	28.1%	29.4%	38.5%	382
Southwest	27.1%	28.4%	30.7%	13.9%	20.9%	383

Pre-diagnostic alignment - 2024

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	33.9%	12.9%	32.3%	21.0%	24.4%	82
Farmers	31.4%	13.7%	33.3%	21.6%	25.0%	68
Geico	34.4%	21.9%	28.1%	15.6%	20.0%	40
Liberty Mutual	33.3%	8.3%	30.6%	27.8%	21.7%	46
Nationwide	27.3%	27.3%	23.6%	21.8%	32.1%	81
Progressive	26.2%	26.2%	19.0%	28.6%	23.6%	55
State Farm	36.6%	22.0%	25.2%	16.3%	30.9%	178
USAA	35.1%	16.2%	27.0%	21.6%	26.0%	50
Non-DRP						
Allstate	18.0%	21.2%	26.7%	34.1%	35.3%	394
Farmers	18.2%	18.6%	30.8%	32.4%	36.2%	387
Geico	19.6%	22.5%	24.2%	33.7%	34.2%	433
Liberty Mutual	18.1%	20.8%	27.9%	33.2%	35.0%	408
Nationwide	20.9%	20.4%	27.2%	31.5%	34.7%	360
Progressive	21.1%	21.1%	26.4%	31.3%	34.0%	430
State Farm	18.9%	19.4%	26.3%	35.5%	32.6%	322
USAA	19.3%	21.2%	30.3%	29.2%	34.6%	419

Pre-diagnostic alignment - 2024

Notes from  
Mike

The ADAS in today's vehicles are reliant on proper suspension alignment as well as steering angle sensors. This procedure is something we expect to become more prevalent in the future.

It might be helpful to watch the [SCRS Quick Tip video](#) on this topic. Also, download [this spreadsheet](#) from Hunter Engineering (which I helped them build) on not-included alignment operations.



DEG Tracking #  
20707

Information Provider  
CCC

Inquiry Details  
[Link to DEG inquiry result](#)

## R&I of electrical components

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

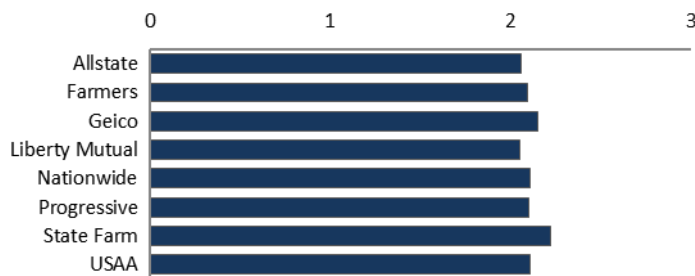


**Operation:** Removal and reinstallation (or partial set-back beyond 12-20 inches) of electrical components from areas on the vehicle on which welding will occur during repairs to prevent damage from electromagnetic pulse (EMP).

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	40.8%	31.6%	20.3%	7.3%	9.8%	498
Farmers	39.8%	35.5%	18.9%	5.8%	11.5%	471
Geico	42.5%	34.8%	17.5%	5.2%	9.7%	493
Liberty Mutual	41.1%	30.1%	21.5%	7.4%	11.0%	471
Nationwide	43.8%	30.2%	19.6%	6.4%	12.2%	460
Progressive	41.6%	33.4%	18.1%	6.9%	9.4%	512
State Farm	47.9%	31.3%	15.3%	5.5%	9.2%	524
USAA	42.3%	32.9%	18.9%	6.0%	10.3%	485

R&I of electrical components - 2024

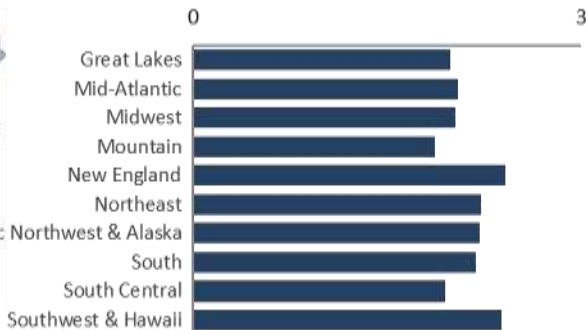


R&I of electrical components - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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



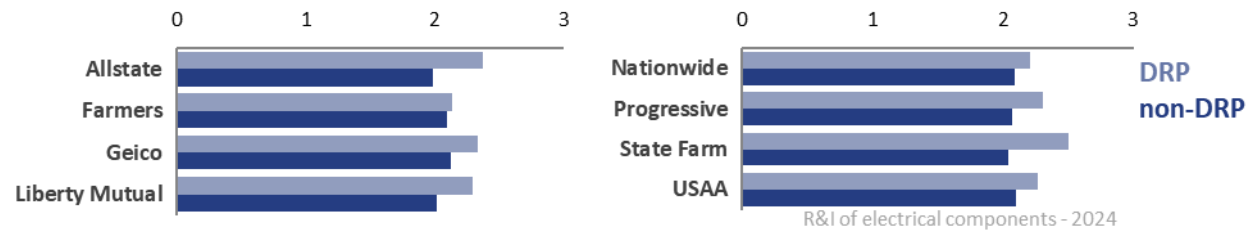
Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	39.1%	29.4%	23.0%	8.4%	11.9%	690
Mid-Atlantic	38.8%	33.4%	21.6%	6.3%	8.3%	349
Midwest	39.1%	36.9%	12.0%	12.0%	17.7%	435
Mountain	27.3%	42.6%	19.4%	10.7%	13.2%	333
New England	58.8%	30.1%	5.2%	5.9%	13.6%	177
Northeast	46.1%	34.1%	16.2%	3.7%	7.2%	500
Pacific Northwest	40.7%	44.7%	10.2%	4.4%	1.3%	229
South	48.6%	26.7%	19.4%	5.3%	3.5%	454
South Central	35.8%	26.5%	34.3%	3.4%	16.1%	386
Southwest	56.5%	27.7%	14.0%	1.8%	8.9%	361

R&I of electrical components - 2024

R&I of electrical components

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	53.8%	33.3%	9.0%	3.8%	4.9%	82
Farmers	44.8%	31.3%	16.4%	7.5%	5.6%	71
Geico	55.0%	27.5%	12.5%	5.0%	2.4%	41
Liberty Mutual	58.3%	18.8%	16.7%	6.3%	0.0%	48
Nationwide	48.1%	28.6%	19.5%	3.9%	4.9%	81
Progressive	55.6%	27.8%	9.3%	7.4%	5.3%	57
State Farm	64.3%	24.0%	9.4%	2.3%	5.0%	180
USAA	46.2%	36.5%	15.4%	1.9%	0.0%	52
Non-DRP						
Allstate	38.2%	30.9%	22.8%	8.1%	10.6%	398
Farmers	39.6%	35.4%	19.3%	5.7%	12.3%	383
Geico	41.4%	34.7%	18.5%	5.4%	10.2%	433
Liberty Mutual	39.0%	30.9%	22.2%	7.9%	12.1%	405
Nationwide	43.1%	29.7%	19.8%	7.3%	13.5%	362
Progressive	39.9%	33.6%	19.6%	6.9%	9.7%	435
State Farm	39.1%	33.9%	19.4%	7.6%	11.1%	325
USAA	42.1%	32.1%	19.0%	6.8%	11.3%	415

R&I of electrical components - 2024

This is absolutely required by all the vehicle manufacturers, and here's why: Welding systems are typically 110 to 220 volts, far more than the 11-15 volt charging systems in most cars. Electric welders also produce high levels of electromagnetic noise. So, any conductor of electricity – such as electrical components – can work as an antenna, picking up the charge from a welder with its higher voltage that can destroy the electronics.

We have seen that OEMs now vary on how far to remove electrical components. Some OEMs say 12 inches, others (including Toyota and Lexus) say 18 inches, and still others (such as Land Rover and Jaguar) say 20 inches. In addition, Toyota and Lexus state you must disconnect the main SRS connector located under the center console; this requires the removal of the seat which then may trigger the need for a seat calibration. That is why we say: Learn to research, research to learn.

Notes from  
Mike



DEG Tracking #	Information Provider	Inquiry Details
15971	Audatex	<a href="#">Link to DEG inquiry result</a>
7889	CCC	<a href="#">Link to DEG inquiry result</a>
16887	Mitchell	<a href="#">Link to DEG inquiry result</a>



## Stall cure time

*Of those that negotiate for this, 9% are paid "always" or "most of the time."*

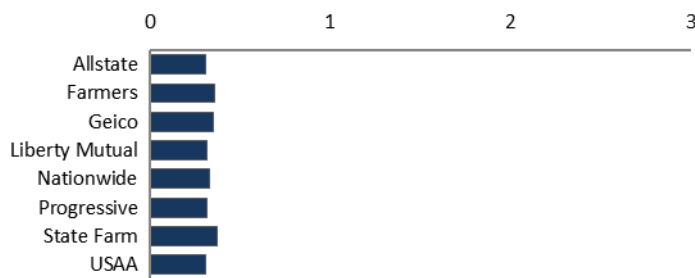


**Operation:** Fee for the time (in some cases 36 to 48 hours, as required by the OEM) during which a vehicle must remain stationary to allow structural / adhesive bonding to cure.

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	4.9%	4.1%	8.2%	82.8%	75.6%	499
Farmers	6.9%	2.6%	10.3%	80.2%	75.7%	478
Geico	4.8%	5.6%	8.9%	80.6%	74.9%	495
Liberty Mutual	5.7%	3.3%	8.2%	82.8%	74.5%	478
Nationwide	5.2%	3.4%	10.3%	81.0%	75.2%	468
Progressive	4.8%	4.0%	9.7%	81.5%	75.6%	508
State Farm	7.5%	3.8%	6.8%	82.0%	74.5%	522
USAA	5.6%	1.6%	11.3%	81.5%	74.6%	489

Stall cure time - 2024



Stall cure time - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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

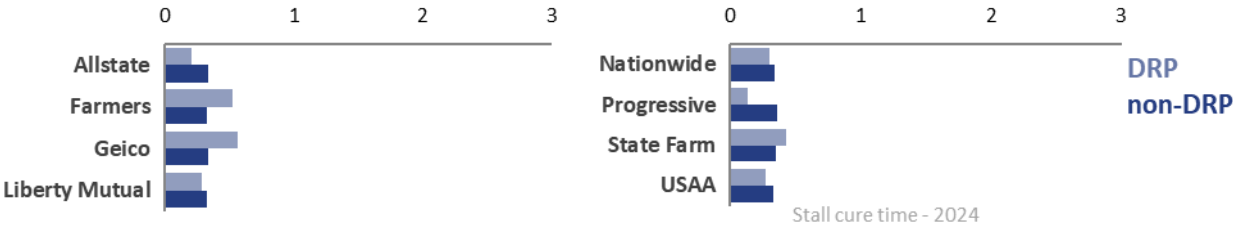


Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	5.5%	5.5%	0.7%	88.3%	80.1%	730
Mid-Atlantic	9.7%	2.2%	11.8%	76.3%	73.4%	350
Midwest	2.5%	7.4%	1.2%	88.9%	82.1%	452
Mountain	0.0%	7.3%	0.9%	91.8%	66.0%	324
New England	3.9%	7.8%	27.5%	60.8%	69.1%	165
Northeast	6.4%	0.8%	6.4%	86.4%	74.6%	492
Pacific Northwest	18.6%	4.3%	27.1%	50.0%	70.1%	234
South	4.4%	0.0%	0.7%	94.9%	69.2%	441
South Central	8.9%	1.1%	17.8%	72.2%	77.2%	394
Southwest	0.0%	2.5%	22.5%	75.0%	77.5%	355

Stall cure time - 2024

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	0.0%	4.2%	12.5%	83.3%	70.7%	82
Farmers	9.5%	9.5%	4.8%	76.2%	69.1%	68
Geico	0.0%	22.2%	11.1%	66.7%	76.9%	39
Liberty Mutual	0.0%	5.9%	17.6%	76.5%	63.0%	46
Nationwide	0.0%	10.0%	10.0%	80.0%	75.6%	82
Progressive	0.0%	6.7%	0.0%	93.3%	73.7%	57
State Farm	11.4%	2.3%	4.5%	81.8%	75.7%	181
USAA	0.0%	0.0%	26.7%	73.3%	71.7%	53
Non-DRP						
Allstate	6.3%	4.2%	6.3%	83.2%	76.1%	398
Farmers	6.5%	1.1%	10.9%	81.5%	76.5%	392
Geico	5.4%	4.5%	8.9%	81.3%	74.4%	437
Liberty Mutual	6.9%	2.9%	6.9%	83.3%	75.3%	413
Nationwide	6.5%	2.2%	10.8%	80.6%	74.8%	369
Progressive	5.7%	3.8%	11.3%	79.2%	75.4%	431
State Farm	5.8%	4.7%	8.1%	81.4%	73.3%	322
USAA	6.6%	1.9%	9.4%	82.1%	74.6%	417

Stall cure time - 2024

As we start to see more manufacturers use riveting with structural adhesives, it's important to know what the cure time is for those adhesives. It's very OEM-specific. In some cases, there's a 36- to 48-hour cure time, during which the vehicle cannot be moved. So, make sure you research the OEM repair procedures (including the "Precautions" sections) to ensure you're following the guidelines for approved products as well cure times and (just as important) temperatures.

Notes from  
Mike

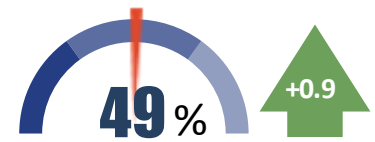


DEG Tracking #	Information Provider	Inquiry Details
14123	Audatex	<a href="#">Link to DEG inquiry result</a>
5317	CCC	<a href="#">Link to DEG inquiry result</a>
12709	Mitchell	<a href="#">Link to DEG inquiry result</a>



## Final verification of measurements

*Of those that negotiate for this, 49% are paid "always" or "most of the time."*

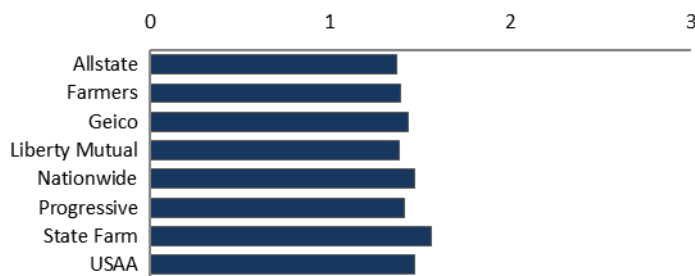


**Operation:** Final check and print-out of measurements following completion of repairs.

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	21.5%	25.9%	21.1%	31.5%	48.8%	490
Farmers	22.5%	24.6%	22.9%	30.1%	49.7%	469
Geico	23.6%	24.8%	22.1%	29.5%	47.3%	490
Liberty Mutual	21.8%	25.9%	21.3%	31.0%	49.0%	469
Nationwide	23.5%	27.9%	21.2%	27.4%	50.5%	457
Progressive	22.8%	25.1%	22.4%	29.7%	48.3%	501
State Farm	30.1%	22.1%	21.7%	26.1%	46.4%	515
USAA	24.3%	26.7%	20.6%	28.3%	48.6%	481

Final verification of measurements - 2024

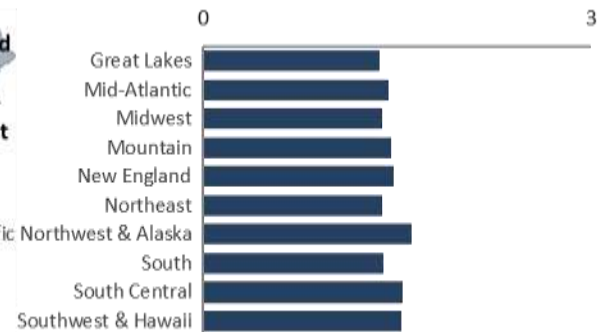


Final verification of measurements - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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



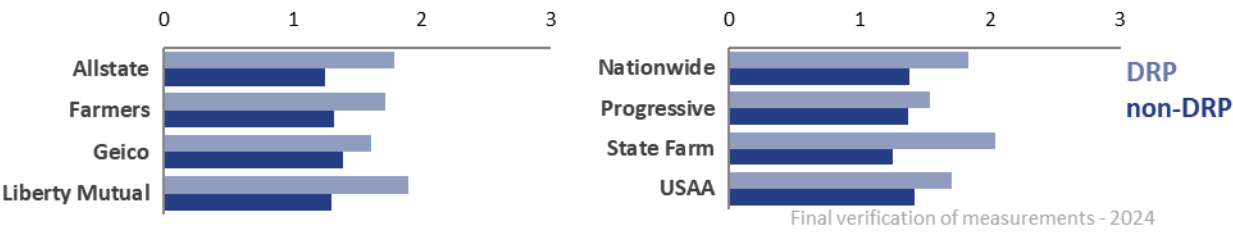
Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	24.7%	20.1%	21.2%	33.9%	59.3%	695
Mid-Atlantic	16.6%	29.9%	33.2%	20.3%	44.7%	338
Midwest	25.6%	21.4%	18.5%	34.5%	62.4%	447
Mountain	21.1%	35.7%	10.6%	32.7%	38.8%	325
New England	27.8%	21.5%	20.3%	30.4%	53.3%	169
Northeast	21.7%	24.7%	23.1%	30.4%	38.4%	485
Pacific Northwest	16.5%	40.3%	30.9%	12.2%	39.0%	228
South	24.6%	21.9%	21.1%	32.4%	42.1%	442
South Central	28.4%	19.1%	30.7%	21.9%	44.0%	384
Southwest	32.9%	24.0%	6.0%	37.1%	53.5%	359

Final verification of measurements - 2024

Final verification of measurements

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	34.6%	30.8%	13.5%	21.2%	35.8%	81
Farmers	30.8%	30.8%	17.9%	20.5%	43.5%	69
Geico	34.8%	17.4%	21.7%	26.1%	42.5%	40
Liberty Mutual	29.0%	48.4%	6.5%	16.1%	31.1%	45
Nationwide	23.9%	47.8%	15.2%	13.0%	42.5%	80
Progressive	37.1%	14.3%	14.3%	34.3%	37.5%	56
State Farm	49.0%	22.5%	11.8%	16.7%	43.3%	180
USAA	25.7%	40.0%	14.3%	20.0%	32.7%	52
Non-DRP						
Allstate	18.6%	22.9%	23.4%	35.1%	52.2%	393
Farmers	21.5%	22.0%	23.7%	32.8%	51.7%	385
Geico	22.4%	25.1%	22.0%	30.5%	48.5%	433
Liberty Mutual	20.8%	22.3%	22.8%	34.0%	51.7%	408
Nationwide	23.7%	23.1%	21.3%	32.0%	53.3%	362
Progressive	20.4%	26.1%	23.7%	29.9%	50.6%	427
State Farm	19.3%	19.9%	28.0%	32.9%	49.4%	318
USAA	23.9%	24.4%	21.4%	30.3%	51.4%	414

Final verification of measurements - 2024

I believe that as the vehicle manufacturers continue to use new substrates and combinations of substrates to allow the inertia forces to transfer throughout the vehicle to protect the occupants, they will increasingly state that the complete vehicle will have to be post-measured following repairs to verify that everything is structurally sound.

I would HIGHLY encourage those of you who are using an electronic quality control (QC) app to document this.

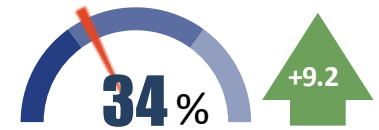
Notes from Mike



DEG Tracking #	Information Provider	Inquiry Details
12205	Audatex	<a href="#">Link to DEG inquiry result</a>
17849	Mitchell	<a href="#">Link to DEG inquiry result</a>

## Clear personal data

*Of those that negotiate for this, 34% are paid "always" or "most of the time."*

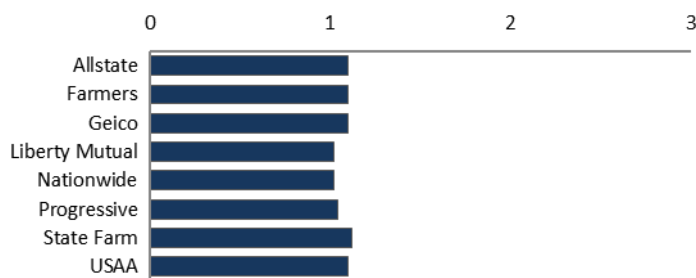


**Operation:** Labor to erase customer's personal data (such as garage door code, GPS data, data from a synched cell phone, etc.) from a vehicle that has been declared a total loss.

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	24.7%	9.6%	16.4%	49.3%	70.6%	497
Farmers	25.2%	10.1%	14.4%	50.4%	70.8%	476
Geico	25.2%	9.5%	15.0%	50.3%	69.9%	489
Liberty Mutual	22.0%	11.3%	13.5%	53.2%	70.4%	476
Nationwide	22.9%	9.3%	15.0%	52.9%	70.1%	468
Progressive	22.7%	10.7%	14.7%	52.0%	70.2%	504
State Farm	26.0%	8.4%	16.9%	48.7%	70.2%	516
USAA	24.7%	10.3%	15.8%	49.3%	70.0%	487

Erase customer data from total loss vehicle - 2024



Erase customer data from total loss vehicle - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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

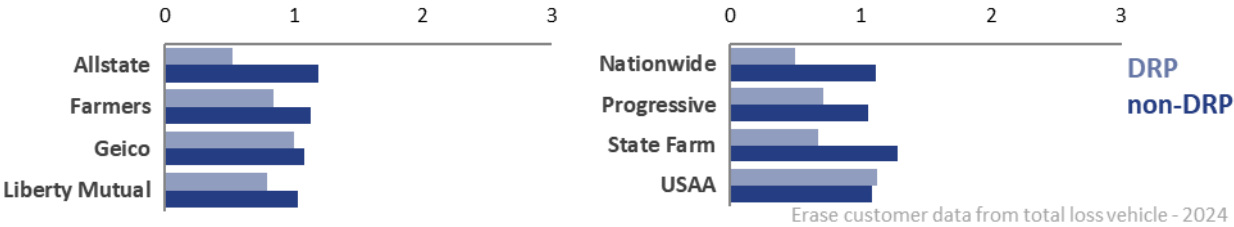


Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	19.9%	10.6%	17.4%	52.1%	67.1%	718
Mid-Atlantic	28.9%	7.0%	20.2%	43.9%	67.2%	348
Midwest	19.7%	13.7%	19.7%	47.0%	73.6%	444
Mountain	7.8%	0.0%	15.5%	76.7%	66.7%	309
New England	22.4%	40.8%	14.3%	22.4%	68.8%	157
Northeast	37.2%	6.1%	13.3%	43.3%	64.1%	501
Pacific Northwest	46.4%	5.4%	12.5%	35.7%	75.4%	228
South	14.2%	7.1%	10.6%	68.1%	75.3%	458
South Central	28.2%	20.5%	0.0%	51.3%	80.6%	402
Southwest	23.9%	6.8%	20.5%	48.7%	66.4%	348

Erase customer data from total loss vehicle - 2024

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	13.0%	0.0%	13.0%	73.9%	72.6%	84
Farmers	15.8%	10.5%	15.8%	57.9%	71.6%	67
Geico	25.0%	12.5%	0.0%	62.5%	79.5%	39
Liberty Mutual	21.4%	0.0%	14.3%	64.3%	68.9%	45
Nationwide	4.5%	9.1%	18.2%	68.2%	73.2%	82
Progressive	11.8%	11.8%	11.8%	64.7%	70.2%	57
State Farm	14.0%	4.7%	16.3%	65.1%	75.8%	178
USAA	20.0%	13.3%	26.7%	40.0%	70.0%	50
Non-DRP						
Allstate	26.3%	11.0%	17.8%	44.9%	70.3%	397
Farmers	25.9%	10.3%	14.7%	49.1%	70.6%	395
Geico	24.6%	9.0%	16.4%	50.0%	69.2%	435
Liberty Mutual	22.1%	11.5%	13.9%	52.5%	70.7%	416
Nationwide	26.5%	8.8%	15.0%	49.6%	69.6%	372
Progressive	23.4%	10.2%	15.6%	50.8%	70.3%	431
State Farm	29.9%	10.3%	17.8%	42.1%	66.9%	323
USAA	24.4%	10.2%	15.0%	50.4%	69.9%	422

Erase customer data from total loss vehicle - 2024

Clearing the vehicle owner's personal data is something we need to start thinking about for our customers. There was a [news report](#) in 2023 about a Tesla that had been declared a total loss in the U.S. subsequently being driven in Ukraine – with the driver there using the still-connected Spotify account belonging to the former U.S. owner of the vehicle.

A vehicle owner today may have their home address stored in their navigation unit of the vehicle. Their contacts can be stored when they synch their phone. Garage door opener codes might be stored. So, we need to be asking the vehicle owner, when the vehicle is a total loss, if they would they like us to erase their personal information. The process for this can be found in the owner's manual.

Check the [Resources section](#) at the end of this report for a link to an excellent document from NADA on "Personal Data in Your Car."

Notes from Mike



DEG Tracking #	Information Provider	Inquiry Details
20793	Audatex	<a href="#">Link to DEG inquiry result</a>
20794	CCC	<a href="#">Link to DEG inquiry result</a>
20795	Mitchell	<a href="#">Link to DEG inquiry result</a>

## Disconnect and reconnect battery

*Of those that negotiate for this, 81% are paid "always" or "most of the time."*

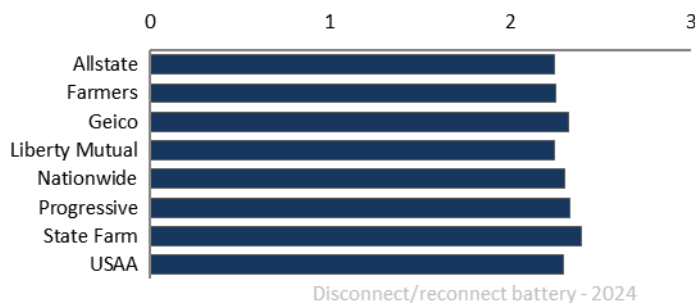


**Operation:** Disconnect battery prior to repairing a vehicle, and reconnect the battery after repairs are complete.

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	50.8%	27.6%	16.7%	4.8%	4.4%	500
Farmers	49.7%	29.9%	16.6%	3.8%	4.9%	474
Geico	52.6%	29.5%	15.6%	2.3%	4.0%	495
Liberty Mutual	51.2%	26.8%	17.1%	4.9%	5.3%	476
Nationwide	53.6%	27.0%	15.0%	4.4%	5.3%	457
Progressive	54.2%	28.8%	13.2%	3.9%	4.1%	514
State Farm	57.1%	27.5%	12.6%	2.8%	3.3%	523
USAA	52.0%	28.8%	15.3%	3.9%	4.7%	488

Disconnect/reconnect battery - 2024

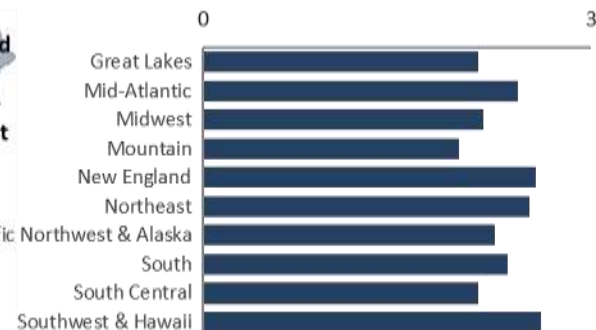


Disconnect/reconnect battery - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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



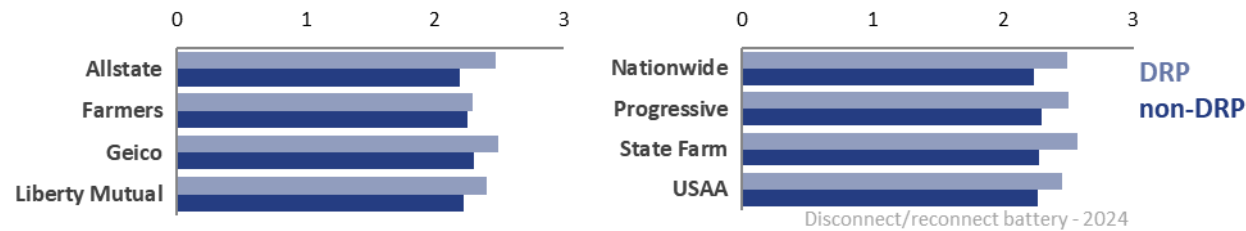
Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	48.7%	22.2%	22.0%	7.1%	8.8%	727
Mid-Atlantic	58.9%	27.0%	13.2%	0.9%	2.1%	340
Midwest	46.1%	32.6%	13.2%	8.1%	6.8%	438
Mountain	27.1%	50.0%	16.5%	6.5%	5.8%	329
New England	74.9%	9.9%	12.9%	2.3%	0.0%	171
Northeast	64.0%	25.8%	9.2%	1.0%	1.4%	496
Pacific Northwest	45.8%	37.0%	14.5%	2.6%	1.3%	230
South	55.1%	26.7%	17.1%	1.1%	0.0%	439
South Central	41.4%	32.0%	24.6%	1.9%	8.1%	394
Southwest	71.4%	21.4%	3.4%	3.7%	3.6%	363

Disconnect/reconnect battery - 2024

Disconnect and reconnect battery

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	66.7%	18.5%	9.9%	4.9%	2.4%	83
Farmers	53.6%	27.5%	13.0%	5.8%	4.2%	72
Geico	61.0%	26.8%	12.2%	0.0%	0.0%	41
Liberty Mutual	66.7%	14.6%	10.4%	8.3%	0.0%	48
Nationwide	63.8%	23.8%	10.0%	2.5%	1.2%	81
Progressive	66.7%	22.2%	5.6%	5.6%	5.3%	57
State Farm	71.9%	17.4%	6.7%	3.9%	2.2%	182
USAA	56.9%	33.3%	7.8%	2.0%	0.0%	51
Non-DRP						
Allstate	47.4%	29.4%	18.2%	4.9%	4.7%	403
Farmers	49.2%	29.7%	17.6%	3.5%	4.9%	389
Geico	51.7%	29.5%	16.2%	2.6%	4.3%	439
Liberty Mutual	49.5%	27.9%	17.9%	4.6%	5.8%	414
Nationwide	50.9%	27.6%	16.5%	5.0%	6.1%	362
Progressive	52.4%	29.5%	14.4%	3.8%	3.9%	441
State Farm	49.0%	32.5%	16.2%	2.2%	3.7%	326
USAA	51.5%	28.0%	16.3%	4.3%	5.2%	422

Disconnect/reconnect battery - 2024

Every vehicle manufacturer says you must disconnect the battery for welding. But other procedures also require disconnecting the battery, such as disconnecting an electrical component or even a fender where a ground wire is attached. Some shops believe that if they're using a 'memory saver' that is sufficient. That's not accurate. You still need to disconnect the battery cable. You must research the OEM procedures for vehicle-specific steps that must be followed. There can also be wait time after a vehicle has been turned off before you can disconnect the battery. Disconnecting the battery often will set diagnostic trouble codes (DTCs). You can't check for those without doing a post-repair vehicle scan in conjunction with reconnecting the battery. Lastly, it's important to use the correct terminology: It's not "R&I battery" when all you are doing is just disconnecting one cable. It's "D&R battery" (for disconnect and reconnect).

Notes from Mike



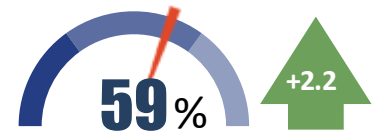


DEG Tracking #	Information Provider	Inquiry Details
12260	CCC	<a href="#">Link to DEG inquiry result</a>
17083	Audatex	<a href="#">Link to DEG inquiry result</a>
16887	Mitchell	<a href="#">Link to DEG inquiry result</a>



## Battery reconnect procedures

*Of those that negotiate for this, 59% are paid "always" or "most of the time."*

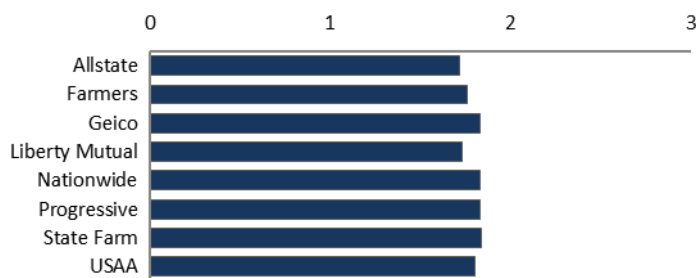


**Operation:** Perform all procedures required by the OEM after a battery has been disconnected and reconnected (i.e. initializations, steering angle sensor, etc.).

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	31.1%	25.1%	28.2%	15.5%	29.5%	502
Farmers	33.2%	24.2%	28.4%	14.2%	30.3%	475
Geico	37.0%	24.5%	23.4%	15.1%	29.2%	496
Liberty Mutual	32.4%	23.8%	27.7%	16.1%	29.7%	478
Nationwide	36.5%	23.5%	26.3%	13.6%	29.9%	461
Progressive	35.8%	24.7%	25.6%	13.9%	29.3%	509
State Farm	38.0%	22.3%	24.7%	14.9%	28.1%	523
USAA	35.7%	23.8%	25.5%	15.1%	29.4%	489

Steps required after a battery disconnect - 2024



Steps required after a battery disconnect - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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



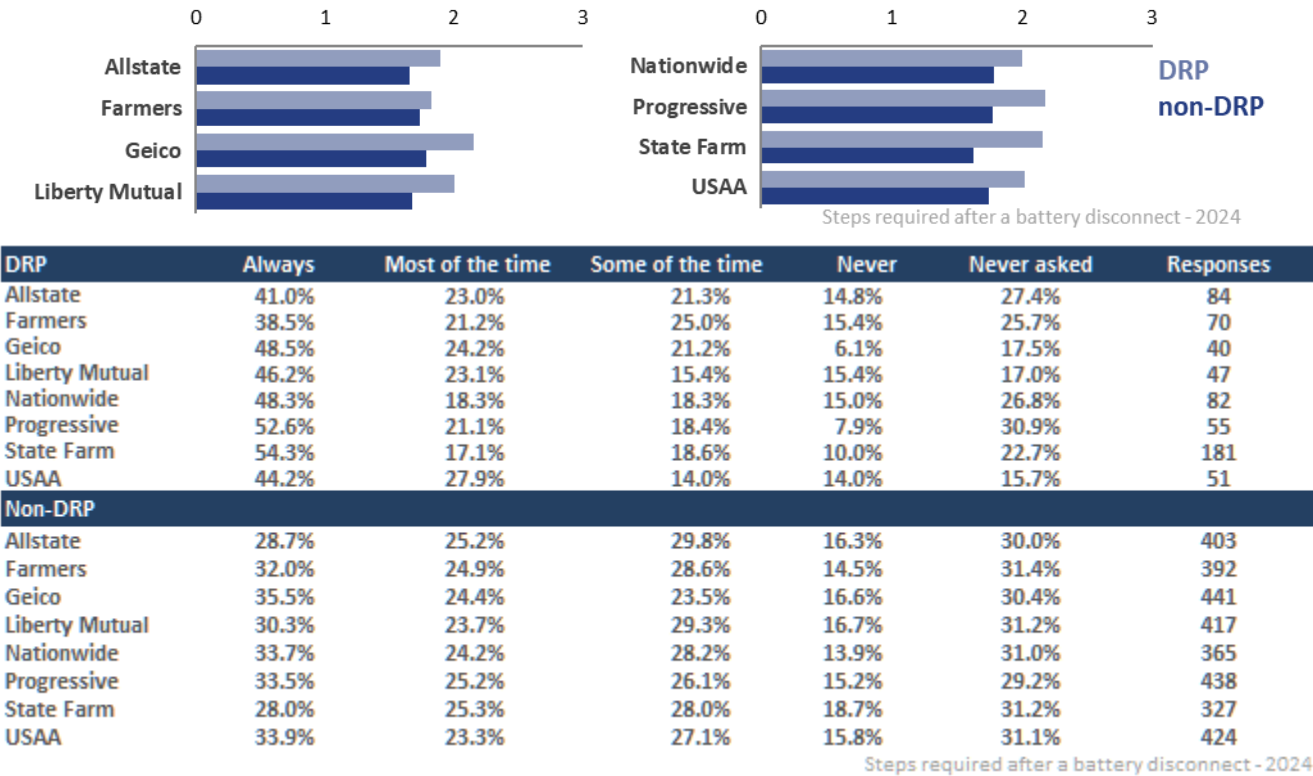
Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	32.9%	16.8%	26.0%	24.3%	42.2%	720
Mid-Atlantic	29.3%	26.3%	27.0%	17.4%	21.3%	343
Midwest	31.1%	24.2%	26.9%	17.8%	40.4%	443
Mountain	12.5%	31.3%	31.7%	24.6%	32.7%	333
New England	74.6%	22.5%	1.4%	1.4%	13.9%	165
Northeast	45.2%	32.1%	13.9%	8.8%	20.8%	500
Pacific Northwest	32.4%	26.9%	35.2%	5.5%	20.9%	230
South	42.0%	11.8%	33.0%	13.2%	22.8%	451
South Central	25.1%	26.2%	34.8%	14.0%	29.5%	396
Southwest	33.7%	27.1%	27.8%	11.4%	27.6%	352

Steps required after a battery disconnect - 2024

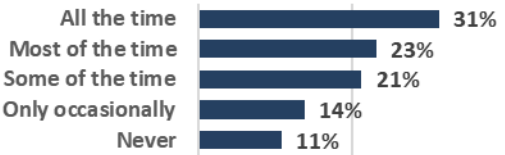
Battery reconnect procedures

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.




How frequently do you research OEM repair procedures that are necessary after a battery is reconnected?



Researching procedures required when the battery is disconnected and reconnected is critical to a safe and proper repair. **This needs to happen every single time on every single vehicle.** I was analyzing the procedures called for by one Asian OEM recently and found **11 procedures required after reconnecting the battery.** A lot of people think these procedures are just something related to electronics or one-touch features, but in some cases, performing a steering sensor zero point calibration may be required, which can impact ADAS functions. Disconnecting the battery often will set diagnostic trouble codes (DTCs). You can't check for those without doing a post-repair vehicle scan in conjunction with reconnecting the battery.

Notes from Mike





DEG Tracking #	Information Provider	Inquiry Details
12260	CCC	<a href="#">Link to DEG inquiry result</a>
16887	Mitchell	<a href="#">Link to DEG inquiry result</a>
17128	Mitchell	<a href="#">Link to DEG inquiry result</a>



## Administrative fee for re-rekeying of estimate or reconciliation of insurer estimate and shop estimate



*Of those that negotiate for this, 8% are paid "always" or "most of the time."*

**Operation:** A fee for the administrative time required to enter an insurer-prepared estimate into the shop's estimating system or to reconcile insurer estimate and shop estimate.

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	3.8%	2.7%	12.6%	80.9%	62.7%	490
Farmers	4.6%	2.9%	9.1%	83.4%	62.4%	466
Geico	5.6%	3.4%	9.6%	81.4%	63.2%	481
Liberty Mutual	4.6%	2.3%	10.3%	82.9%	62.4%	466
Nationwide	4.8%	2.4%	10.2%	82.5%	63.6%	456
Progressive	4.8%	3.2%	13.9%	78.1%	62.1%	493
State Farm	5.4%	3.8%	8.6%	82.3%	63.2%	505
USAA	5.6%	2.8%	10.7%	80.9%	62.9%	480

Admin fee for re-rekeying of estimate - 2024



Admin fee for re-rekeying of estimate - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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



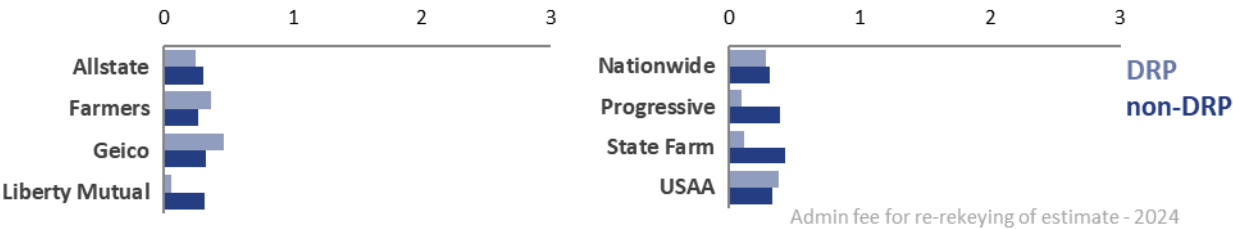
Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	3.1%	3.1%	7.7%	86.1%	64.1%	722
Mid-Atlantic	0.8%	0.8%	19.2%	79.2%	62.1%	330
Midwest	0.0%	13.6%	0.9%	85.5%	74.7%	434
Mountain	4.4%	6.6%	2.7%	86.3%	46.5%	340
New England	32.0%	0.0%	4.0%	64.0%	83.4%	151
Northeast	16.2%	0.5%	20.7%	62.6%	59.3%	486
Pacific Northwest	0.0%	0.0%	20.8%	79.2%	64.8%	219
South	4.6%	0.0%	9.2%	86.2%	59.0%	424
South Central	3.5%	2.1%	4.9%	89.6%	61.6%	375
Southwest	0.0%	1.5%	15.8%	82.7%	62.6%	356

Admin fee for re-rekeying of estimate - 2024

Administrative fee for re-keying estimate

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	5.6%	0.0%	8.3%	86.1%	56.1%	82
Farmers	6.7%	6.7%	3.3%	83.3%	57.1%	70
Geico	0.0%	15.4%	15.4%	69.2%	66.7%	39
Liberty Mutual	0.0%	0.0%	5.9%	94.1%	61.4%	44
Nationwide	3.4%	6.9%	3.4%	86.2%	64.2%	81
Progressive	0.0%	4.5%	0.0%	95.5%	60.7%	56
State Farm	1.6%	1.6%	3.3%	93.4%	65.5%	177
USAA	6.3%	6.3%	6.3%	81.3%	68.6%	51
Non-DRP						
Allstate	3.5%	3.5%	13.9%	79.2%	64.1%	401
Farmers	4.2%	2.1%	10.6%	83.1%	63.5%	389
Geico	6.2%	2.5%	9.3%	82.0%	63.0%	435
Liberty Mutual	5.2%	2.6%	11.0%	81.3%	62.7%	415
Nationwide	5.2%	1.5%	11.9%	81.3%	63.7%	369
Progressive	5.6%	3.1%	16.0%	75.3%	62.3%	430
State Farm	7.4%	4.9%	11.5%	76.2%	62.0%	321
USAA	5.7%	2.5%	11.3%	80.5%	62.3%	422

Admin fee for re-rekeying of estimate - 2024

*It appears that shops continue to re-key estimates, although many can often take advantage of technology to do this task, such as CCC's Auto Workfile Entry (AWE).*

Notes from Mike

## Administrative fee for total losses

*Of those that negotiate for this, 77% are paid "always" or "most of the time."*

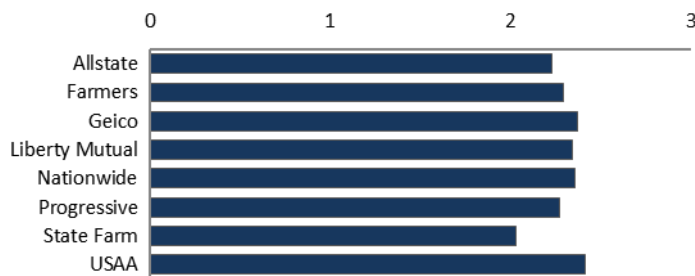


**Operation:** A fee for the administrative time required to generate an estimate, valuation report or other paperwork related to a vehicle declared a total loss rather than being repaired.

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	62.3%	12.6%	10.6%	14.5%	7.1%	496
Farmers	64.9%	11.8%	10.6%	12.7%	7.7%	469
Geico	67.2%	13.1%	9.2%	10.5%	7.5%	494
Liberty Mutual	66.2%	13.2%	9.1%	11.6%	7.4%	476
Nationwide	67.5%	11.9%	9.1%	11.5%	8.9%	460
Progressive	64.0%	12.8%	8.9%	14.3%	6.9%	505
State Farm	59.2%	9.1%	7.6%	24.2%	7.9%	516
USAA	68.6%	12.2%	10.5%	8.7%	8.2%	489

Admin fee for total losses - 2024

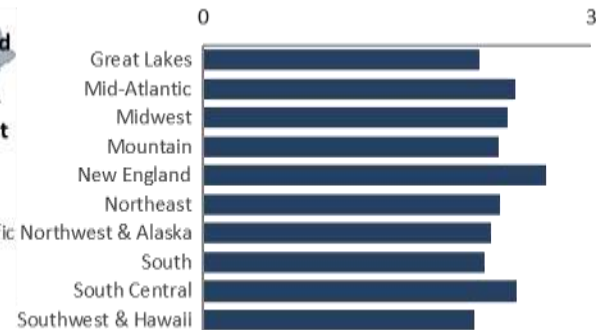


Admin fee for total losses - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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



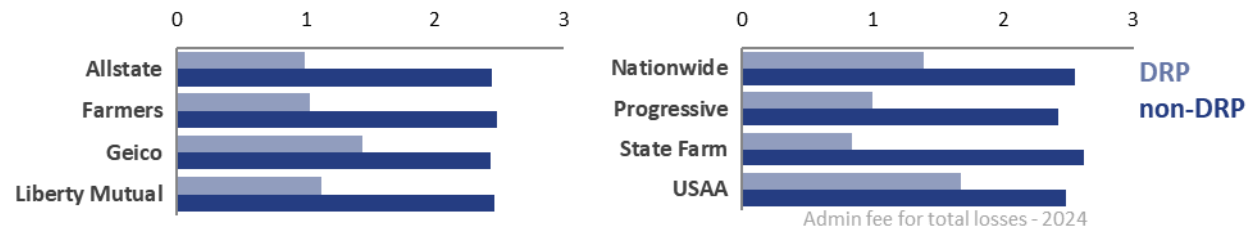
Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	59.3%	11.5%	13.7%	15.5%	7.5%	724
Mid-Atlantic	67.9%	12.4%	13.0%	6.7%	8.2%	343
Midwest	69.5%	11.3%	5.3%	14.0%	10.5%	447
Mountain	59.4%	20.4%	9.6%	10.5%	6.0%	333
New England	85.0%	0.0%	10.0%	5.0%	4.8%	168
Northeast	68.3%	8.4%	8.6%	14.7%	6.5%	495
Pacific Northwest	63.9%	14.3%	3.0%	18.7%	1.3%	233
South	60.6%	13.3%	9.3%	16.9%	2.3%	431
South Central	74.2%	5.7%	9.2%	10.9%	4.2%	384
Southwest	52.1%	23.0%	7.5%	17.4%	23.6%	347

Admin fee for total losses - 2024

Administrative fee for total losses

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	23.6%	9.7%	8.3%	58.3%	12.2%	82
Farmers	20.3%	13.6%	15.3%	50.8%	13.2%	68
Geico	37.5%	12.5%	6.3%	43.8%	17.9%	39
Liberty Mutual	25.6%	11.6%	11.6%	51.2%	8.5%	47
Nationwide	31.0%	15.5%	15.5%	38.0%	11.3%	80
Progressive	22.4%	14.3%	4.1%	59.2%	10.9%	55
State Farm	20.6%	6.5%	9.0%	63.9%	12.9%	178
USAA	47.7%	6.8%	11.4%	34.1%	13.7%	51
Non-DRP						
Allstate	68.9%	13.2%	11.3%	6.6%	5.9%	404
Farmers	71.6%	11.7%	10.1%	6.6%	6.6%	392
Geico	69.0%	13.2%	9.6%	8.2%	6.5%	445
Liberty Mutual	70.2%	13.4%	9.0%	7.5%	7.2%	419
Nationwide	74.7%	11.5%	7.9%	5.9%	8.4%	371
Progressive	68.7%	12.9%	9.7%	8.7%	6.4%	440
State Farm	77.8%	10.6%	7.1%	4.5%	5.2%	328
USAA	70.5%	12.9%	10.6%	6.1%	7.5%	428

Admin fee for total losses - 2024

Certainly, shops may agree to waive these fees as part of a direct repair agreement. But the percentage of shops saying they are paid for this fee all or most of the time has continued to rise (46% in 2015, 57% in 2017, 63% in 2019, 72% in 2021 and 75% this year) because the process has continued to become more complex. It can involve more tear-down, research of OEM procedures, unloading or loading the vehicle to/from a tow truck, etc.

We are seeing more and more shops itemizing their charges such as: estimate or repair plan fee, storage, parts cart storage, disassembly fees, OEM research, etc. There has been some industry discussion in regards to the best way to bill for this from a legal perspective. Some insurers are pushing back on this and storage fees, in some cases even using bill collection agencies to go after shops after-the-fact to recoup amounts paid. It is important that shops have an attorney review their authorization forms to ensure they are protected.

It will be interesting to watch how AI impacts total loss processing in the future, identifying total loss vehicles earlier in the process. Shops that rely on storage for their profitability need to be thinking about how they might replace that revenue moving forward.

Notes from  
Mike



When billing for total loss processing, do you charge a simple flat fee, or an itemized list of charges (such as moving non-drive vehicle, estimate, cover to protect vehicle, etc.)?

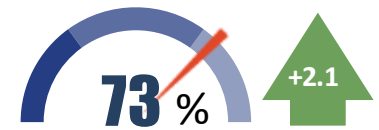
The percentage of shops itemizing has trended up slightly since 2019 when 74% said they itemize.



DEG Tracking #	Information Provider	Inquiry Details
11481	CCC/Audatex/Mitchell	<a href="#">Link to DEG inquiry result</a>

## Transport vehicle to sublet service provider

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

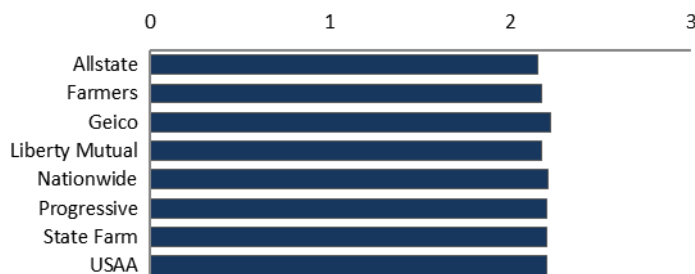


**Operation:** Towing costs or labor to drive the vehicle to/from dealership or other sublet provider.

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	51.4%	19.5%	21.9%	7.2%	6.7%	490
Farmers	52.1%	20.2%	20.7%	7.0%	7.3%	464
Geico	52.3%	22.4%	20.0%	5.3%	7.0%	485
Liberty Mutual	52.1%	20.0%	21.0%	6.9%	6.9%	466
Nationwide	54.4%	19.2%	19.7%	6.7%	8.1%	454
Progressive	51.6%	23.2%	19.2%	6.0%	5.6%	497
State Farm	53.3%	20.7%	18.8%	7.2%	5.3%	511
USAA	52.6%	20.9%	20.4%	6.1%	7.3%	480

Transport vehicle - 2024

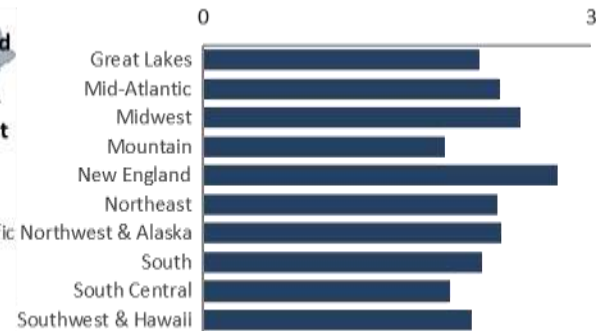


Transport vehicle - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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



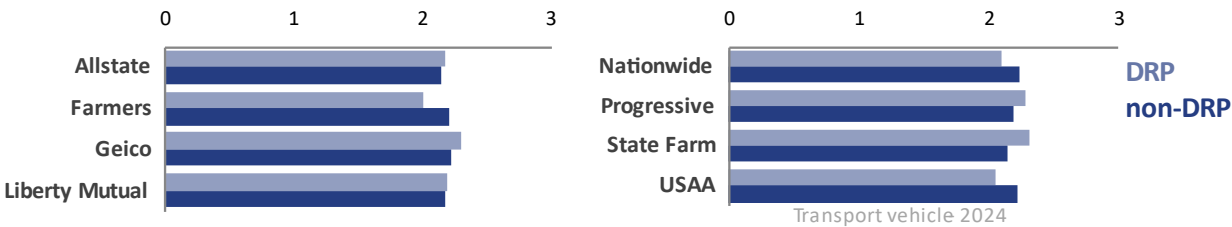
Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	46.3%	25.2%	24.6%	3.9%	9.0%	702
Mid-Atlantic	57.6%	20.6%	16.5%	5.4%	9.2%	348
Midwest	57.4%	32.9%	7.6%	2.1%	11.3%	432
Mountain	40.2%	18.9%	28.2%	12.7%	3.0%	333
New England	83.6%	9.4%	3.8%	3.1%	1.2%	161
Northeast	55.8%	19.0%	22.2%	3.0%	3.7%	482
Pacific Northwest	53.6%	27.7%	14.7%	4.0%	4.3%	234
South	60.3%	6.6%	21.4%	11.7%	1.9%	419
South Central	41.7%	21.3%	23.0%	14.0%	9.7%	380
Southwest	46.5%	20.9%	26.5%	6.2%	8.7%	356

Transport vehicle - 2024

Transport vehicle to sublet service provider

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%	8.8%	23.8%	8.8%	3.6%	83
Farmers	53.6%	10.1%	20.3%	15.9%	2.8%	71
Geico	59.5%	16.2%	18.9%	5.4%	7.5%	40
Liberty Mutual	61.7%	10.6%	12.8%	14.9%	2.1%	48
Nationwide	52.6%	16.7%	19.2%	11.5%	3.7%	81
Progressive	61.8%	16.4%	10.9%	10.9%	3.5%	57
State Farm	60.5%	16.9%	16.3%	6.4%	4.4%	180
USAA	44.7%	29.8%	12.8%	12.8%	7.8%	51
Non-DRP						
Allstate	50.1%	21.8%	21.3%	6.7%	7.5%	401
Farmers	52.1%	22.3%	20.6%	5.1%	8.3%	387
Geico	52.0%	23.0%	19.9%	5.1%	7.1%	439
Liberty Mutual	51.2%	21.3%	21.8%	5.8%	7.5%	412
Nationwide	55.1%	19.8%	19.5%	5.7%	9.2%	368
Progressive	50.5%	24.3%	19.9%	5.4%	6.0%	434
State Farm	49.3%	22.9%	20.3%	7.5%	5.8%	325
USAA	53.8%	19.9%	21.2%	5.1%	7.3%	423

Transport vehicle - 2024

Notes from Mike

As we see more and more ADAS calibrations, and much of this work is being sublet to dealerships, I expect this to continue to increase in the future.





## Tire run-out test

Of those that negotiate for this, 22% are paid "always" or "most of the time."

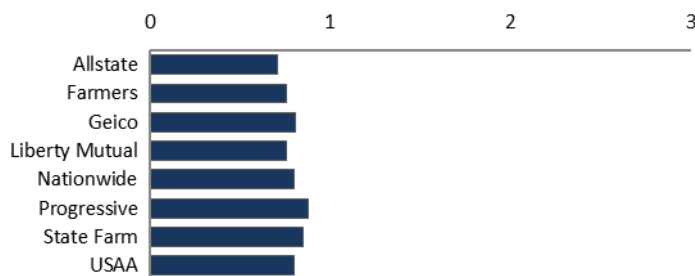


**Operation:** Use a gauge or wheel balancer to check tires for flat spots.

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	8.6%	10.7%	24.3%	56.4%	70.6%	477
Farmers	10.4%	11.9%	21.5%	56.3%	70.6%	459
Geico	11.3%	9.9%	27.0%	51.8%	70.1%	471
Liberty Mutual	11.2%	9.1%	24.5%	55.2%	69.0%	461
Nationwide	11.2%	11.2%	23.9%	53.7%	70.2%	450
Progressive	13.3%	13.3%	21.7%	51.7%	70.5%	485
State Farm	13.0%	11.0%	24.0%	51.9%	69.0%	497
USAA	12.0%	9.9%	24.6%	53.5%	69.9%	471

Tire run-out test - 2024



Tire run-out test - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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

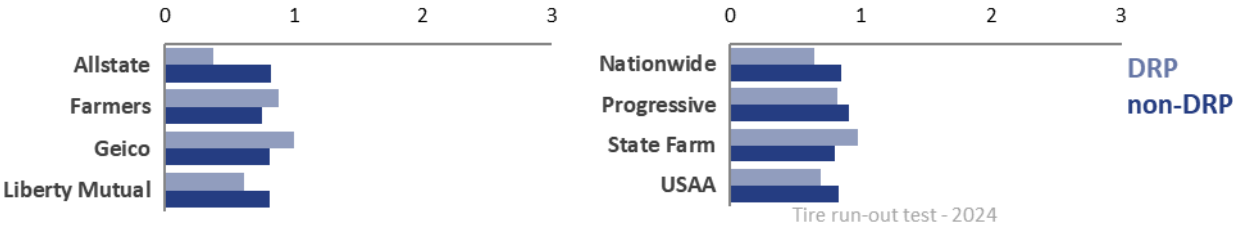


Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	5.2%	12.2%	22.1%	60.6%	70.1%	713
Mid-Atlantic	1.9%	2.9%	38.8%	56.3%	69.3%	335
Midwest	13.4%	11.8%	32.8%	42.0%	71.1%	412
Mountain	0.8%	10.2%	31.4%	57.6%	63.7%	325
New England	33.8%	19.7%	12.7%	33.8%	55.1%	158
Northeast	18.6%	10.2%	22.9%	48.3%	75.6%	484
Pacific Northwest	11.4%	5.7%	27.1%	55.7%	68.0%	219
South	13.4%	13.4%	27.7%	45.4%	70.3%	401
South Central	11.2%	0.0%	16.3%	72.4%	73.7%	373
Southwest	17.5%	21.4%	3.9%	57.3%	70.7%	351

Tire run-out test - 2024

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	0.0%	0.0%	37.9%	62.1%	64.6%	82
Farmers	12.5%	16.7%	16.7%	54.2%	64.7%	68
Geico	11.1%	22.2%	22.2%	44.4%	76.9%	39
Liberty Mutual	13.0%	0.0%	21.7%	65.2%	50.0%	46
Nationwide	8.0%	4.0%	32.0%	56.0%	69.1%	81
Progressive	13.6%	9.1%	22.7%	54.5%	60.7%	56
State Farm	20.4%	9.3%	18.5%	51.9%	69.3%	176
USAA	12.5%	6.3%	18.8%	62.5%	68.0%	50
Non-DRP						
Allstate	11.0%	13.8%	21.1%	54.1%	72.0%	389
Farmers	10.1%	11.0%	22.9%	56.0%	71.7%	385
Geico	11.5%	9.2%	27.7%	51.5%	69.5%	426
Liberty Mutual	11.0%	11.0%	25.4%	52.5%	71.1%	409
Nationwide	12.1%	13.1%	22.4%	52.3%	70.6%	364
Progressive	13.4%	14.3%	21.8%	50.4%	71.9%	423
State Farm	9.2%	12.2%	27.6%	51.0%	68.9%	315
USAA	12.1%	10.5%	25.8%	51.6%	70.1%	415

Tire run-out test - 2024

We at Collision Advice work with a shop that did a study checking the tire run-out on every vehicle that came into their facility after an accident. They found that about 1 in 4 of those vehicles had flat spots on the tires. Here's an [article I wrote about that](#) in early 2023. The type of vehicle and tires, the type of collision, and the weather conditions at the time of the accident can all impact this. As we see more electric vehicles come into our repair facilities, tire run-out tests will become even more critical.

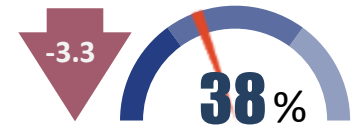
Notes from Mike





## Parts cart storage

*Of those that negotiate for this, 38% are paid "always" or "most of the time."*

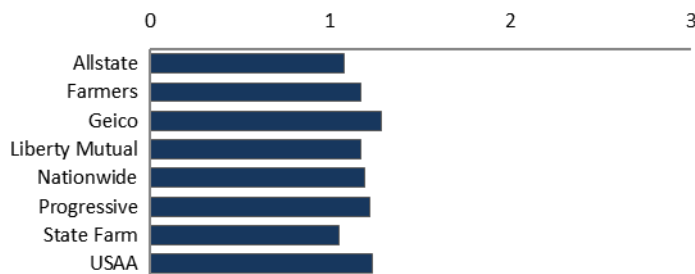


**Operation:** Fee for space required for carts holding parts removed from vehicles that are subsequently declared total losses.

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	25.6%	9.6%	12.2%	52.6%	68.1%	489
Farmers	28.9%	9.4%	11.4%	50.3%	68.3%	470
Geico	32.0%	8.7%	14.7%	44.7%	69.1%	485
Liberty Mutual	28.9%	8.7%	12.8%	49.7%	68.2%	469
Nationwide	27.9%	10.7%	13.6%	47.9%	69.5%	459
Progressive	29.1%	10.8%	12.7%	47.5%	68.3%	499
State Farm	28.0%	4.9%	11.0%	56.1%	68.0%	513
USAA	30.5%	9.9%	11.9%	47.7%	68.7%	483

Parts cart space - 2024

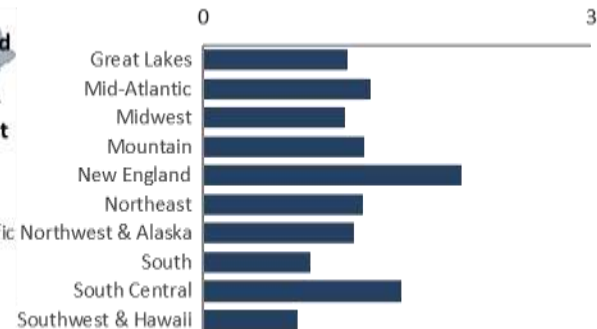


Parts cart space - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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

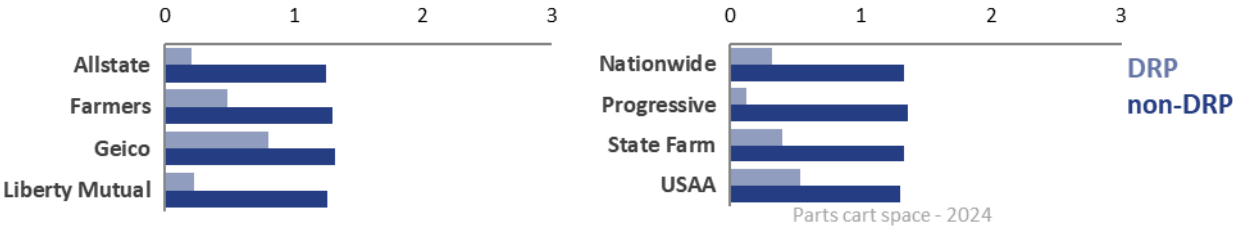


Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	32.4%	1.2%	12.0%	54.4%	66.7%	723
Mid-Atlantic	32.0%	7.0%	20.0%	41.0%	70.9%	344
Midwest	25.8%	6.5%	19.4%	48.4%	77.9%	420
Mountain	28.3%	13.8%	11.9%	45.9%	50.5%	321
New England	60.0%	0.0%	20.0%	20.0%	74.0%	154
Northeast	22.5%	23.5%	8.8%	45.1%	79.6%	500
Pacific Northwest	27.6%	11.5%	11.5%	49.4%	61.8%	228
South	22.0%	0.0%	17.4%	60.6%	69.5%	433
South Central	38.2%	15.3%	8.3%	38.2%	63.0%	389
Southwest	14.3%	13.4%	3.4%	68.9%	66.5%	355

Parts cart space - 2024

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	0.0%	8.3%	4.2%	87.5%	70.7%	82
Farmers	8.7%	8.7%	4.3%	78.3%	66.2%	68
Geico	10.0%	20.0%	10.0%	60.0%	74.4%	39
Liberty Mutual	7.7%	0.0%	0.0%	92.3%	71.1%	45
Nationwide	0.0%	15.8%	0.0%	84.2%	76.3%	80
Progressive	0.0%	5.9%	0.0%	94.1%	69.1%	55
State Farm	10.4%	2.1%	4.2%	83.3%	73.0%	178
USAA	15.4%	0.0%	7.7%	76.9%	74.5%	51
Non-DRP						
Allstate	30.2%	10.1%	14.0%	45.7%	67.5%	397
Farmers	32.5%	9.8%	13.0%	44.7%	68.7%	393
Geico	33.6%	8.0%	15.3%	43.1%	68.6%	436
Liberty Mutual	30.8%	9.8%	14.3%	45.1%	67.9%	414
Nationwide	32.2%	10.2%	16.1%	41.5%	68.1%	370
Progressive	32.6%	11.6%	14.5%	41.3%	68.2%	434
State Farm	35.4%	6.2%	14.2%	44.2%	65.2%	325
USAA	31.9%	11.1%	12.6%	44.4%	68.0%	422

Parts cart space - 2024

We have seen statistics that vehicle repairs are averaging 5-7 more parts than in the past. There is also more disassembly required for repairs. We have seen this fee mostly billed when a vehicle is a total loss, similar to outside storage.

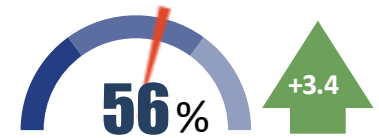
Notes from  
Mike



DEG Tracking #	Information Provider	Inquiry Details
17478	CCC	<a href="#">Link to DEG inquiry result</a>
21459	Mitchell	<a href="#">Link to DEG inquiry result</a>

## Jig rental

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

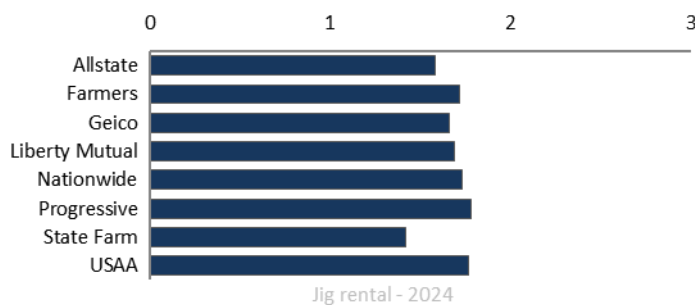


**Operation:** Fee for short-term use of a needed jig or fixture for measuring a particular vehicle using a bench system.

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	33.0%	17.9%	23.6%	25.5%	33.3%	159
Farmers	35.6%	21.8%	21.8%	20.8%	34.0%	153
Geico	34.3%	18.5%	25.9%	21.3%	32.5%	160
Liberty Mutual	35.2%	20.0%	22.9%	21.9%	32.7%	156
Nationwide	35.6%	23.8%	18.8%	21.8%	33.1%	151
Progressive	37.7%	24.5%	16.0%	21.7%	33.3%	159
State Farm	28.7%	19.4%	16.7%	35.2%	33.7%	163
USAA	36.2%	24.8%	19.0%	20.0%	33.5%	158

Jig rental - 2024

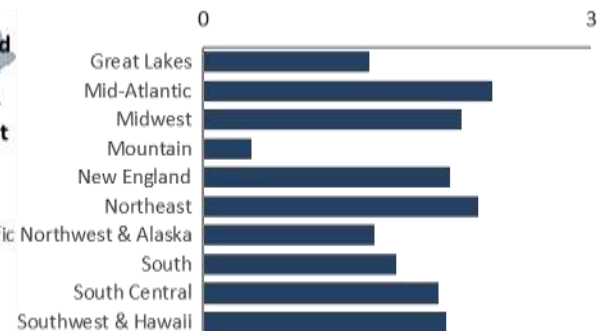


Jig rental - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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

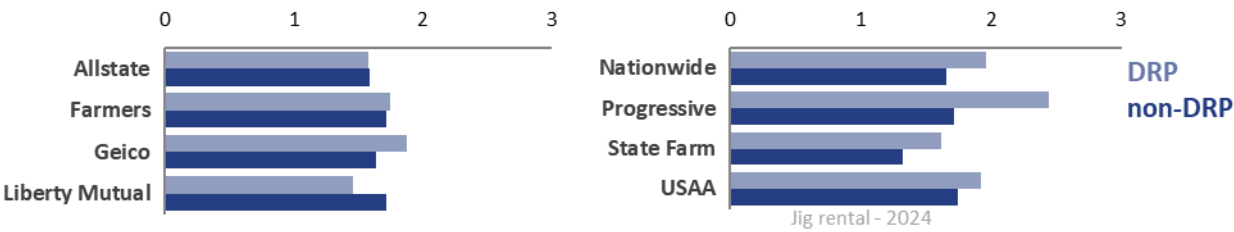


Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	18.8%	33.8%	5.0%	42.5%	60.6%	203
Mid-Atlantic	63.4%	17.1%	0.0%	19.5%	28.1%	57
Midwest	29.2%	43.1%	26.4%	1.4%	35.1%	111
Mountain	0.0%	15.7%	5.7%	78.6%	40.2%	117
New England	53.1%	9.9%	12.3%	24.7%	3.6%	84
Northeast	50.4%	15.6%	30.4%	3.7%	28.6%	189
Pacific Northwest	15.3%	27.8%	30.6%	26.4%	18.2%	88
South	33.7%	14.7%	18.9%	32.6%	37.5%	152
South Central	37.5%	19.2%	30.8%	12.5%	21.1%	152
Southwest	39.2%	23.0%	24.3%	13.5%	30.2%	106

Jig rental - 2024

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	42.1%	10.5%	10.5%	36.8%	32.1%	28
Farmers	50.0%	12.5%	0.0%	37.5%	33.3%	24
Geico	50.0%	12.5%	12.5%	25.0%	38.5%	13
Liberty Mutual	46.2%	0.0%	7.7%	46.2%	35.0%	20
Nationwide	50.0%	20.8%	4.2%	25.0%	35.1%	37
Progressive	55.6%	33.3%	11.1%	0.0%	40.0%	15
State Farm	41.2%	11.8%	14.7%	32.4%	38.2%	55
USAA	58.3%	0.0%	16.7%	25.0%	29.4%	17
Non-DRP						
Allstate	31.0%	19.5%	26.4%	23.0%	33.6%	131
Farmers	32.9%	23.5%	25.9%	17.6%	34.1%	129
Geico	33.0%	19.0%	27.0%	21.0%	32.0%	147
Liberty Mutual	33.7%	22.8%	25.0%	18.5%	32.4%	136
Nationwide	31.2%	24.7%	23.4%	20.8%	32.5%	114
Progressive	36.1%	23.7%	16.5%	23.7%	32.6%	144
State Farm	23.0%	23.0%	17.6%	36.5%	31.5%	108
USAA	33.3%	28.0%	19.4%	19.4%	34.0%	141

Jig rental - 2024

We made a change to the survey in 2021 that, although results in a smaller number of responses for this question, probably gives us more accurate information. We first asked respondents if they ever use jigs. Overall, 65% of shops in 2024 indicated that they do at times use a bench/fixture/jig type of frame machine. The response data here is only from those shops that have a need to rent or assemble jigs.

Notes from Mike



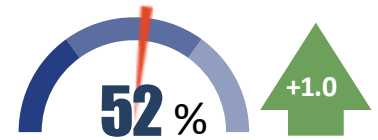
DEG Tracking #  
14557

Information Provider  
Audatex, CCC, Mitchell

Inquiry Details  
[Link to DEG inquiry result](#)

## Jig assembly

*Of those that negotiate for this, 52% are paid "always" or "most of the time."*

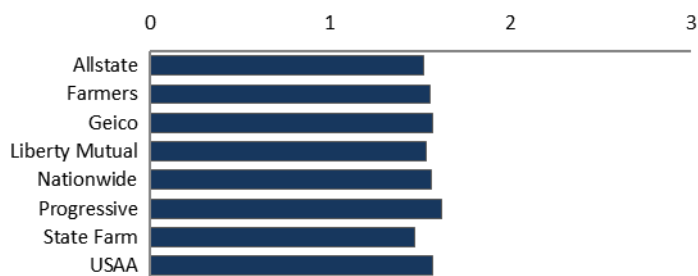


**Operation:** Labor to assemble a jig prior to installation.

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	27.3%	21.7%	26.6%	24.5%	39.1%	235
Farmers	27.1%	24.3%	25.0%	23.6%	38.3%	227
Geico	28.0%	23.8%	25.2%	23.1%	38.9%	234
Liberty Mutual	28.7%	21.7%	23.8%	25.9%	37.6%	229
Nationwide	28.6%	24.1%	21.8%	25.6%	39.3%	219
Progressive	31.5%	25.2%	17.5%	25.9%	39.4%	236
State Farm	28.7%	20.0%	21.3%	30.0%	38.8%	245
USAA	28.4%	24.8%	22.7%	24.1%	39.0%	231

Labor to assemble jig prior to installation - 2024

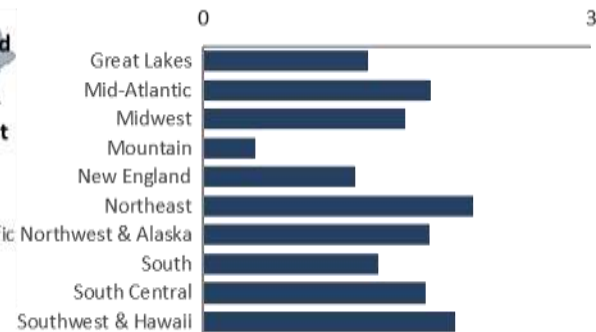


Labor to assemble jig prior to installation - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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

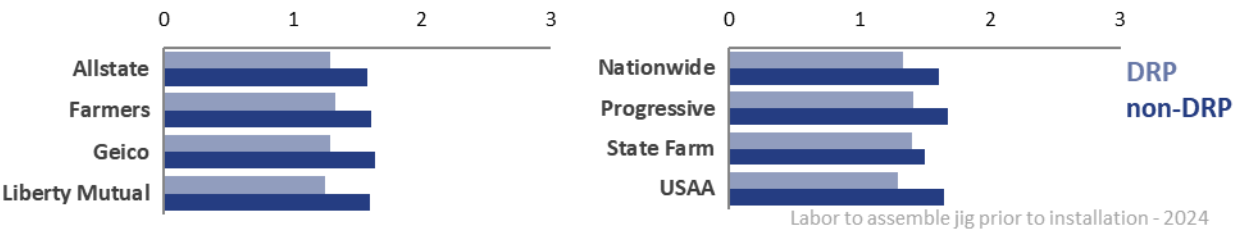


Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	19.7%	15.2%	38.6%	26.5%	58.1%	315
Mid-Atlantic	45.9%	2.7%	32.4%	18.9%	36.8%	117
Midwest	13.5%	49.0%	17.7%	19.8%	35.6%	149
Mountain	1.8%	7.3%	20.2%	70.6%	42.3%	189
New England	0.0%	59.0%	0.0%	41.0%	57.6%	92
Northeast	38.4%	35.2%	23.3%	3.1%	35.4%	246
Pacific Northwest	39.8%	12.0%	31.5%	16.7%	13.6%	125
South	20.0%	25.7%	23.6%	30.7%	38.3%	227
South Central	41.7%	21.9%	3.3%	33.1%	24.1%	199
Southwest	42.2%	19.5%	29.7%	8.6%	35.0%	197

Labor to assemble jig prior to installation - 2024

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	20.8%	25.0%	16.7%	37.5%	45.5%	44
Farmers	20.8%	29.2%	12.5%	37.5%	42.9%	42
Geico	16.7%	33.3%	12.5%	37.5%	44.2%	43
Liberty Mutual	20.8%	25.0%	12.5%	41.7%	42.9%	42
Nationwide	20.8%	29.2%	12.5%	37.5%	45.5%	44
Progressive	22.7%	27.3%	18.2%	31.8%	47.6%	42
State Farm	24.0%	28.0%	12.0%	36.0%	43.2%	44
USAA	25.0%	16.7%	20.8%	37.5%	44.2%	43
Non-DRP						
Allstate	28.8%	21.2%	28.8%	21.2%	37.9%	190
Farmers	28.7%	23.5%	27.8%	20.0%	37.5%	184
Geico	30.5%	22.0%	28.0%	19.5%	37.9%	190
Liberty Mutual	30.5%	21.2%	26.3%	22.0%	36.6%	186
Nationwide	30.3%	22.9%	23.9%	22.9%	37.7%	175
Progressive	33.3%	25.0%	17.5%	24.2%	37.8%	193
State Farm	29.8%	18.5%	23.4%	28.2%	38.0%	200
USAA	29.3%	26.7%	23.3%	20.7%	38.0%	187

Labor to assemble jig prior to installation - 2024

Notes from Mike

We made a change to the survey in 2021 that, although it results in a smaller number of responses for this question, probably gives us more accurate information. We first asked respondents if they ever use jigs. The response data here is just from those shops that do at times have a need to rent or assemble jigs.

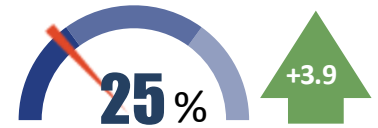


DEG Tracking #	Information Provider	Inquiry Details
12205	Audatex	<a href="#">Link to DEG inquiry result</a>
3360	Mitchell	<a href="#">Link to DEG inquiry result</a>
6273	CCC	<a href="#">Link to DEG inquiry result</a>



## Photo-based estimate

*Of those that negotiate for this, 25% are paid "always" or "most of the time."*



**Operation:** Preparing a photo-based estimate at the insurer's request.

### Response by Insurer

Overall	Always	Most of the time	Some of the time	Never	Never asked	Total Responses
Allstate	17.1%	11.5%	20.8%	50.6%	28.2%	496
Farmers	13.6%	11.7%	22.2%	52.5%	31.4%	472
Geico	13.1%	10.4%	22.6%	54.0%	30.5%	485
Liberty Mutual	14.8%	10.3%	22.4%	52.6%	30.5%	476
Nationwide	14.8%	11.0%	23.0%	51.3%	30.9%	460
Progressive	11.5%	8.6%	17.9%	62.0%	30.5%	499
State Farm	16.5%	10.6%	20.4%	52.5%	30.6%	516
USAA	14.2%	11.2%	23.9%	50.7%	30.2%	486

Photo-based estimate - 2024

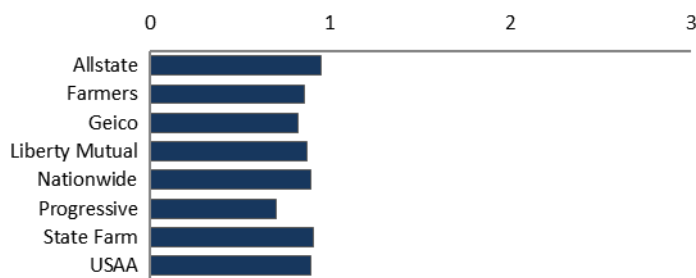


Photo-based estimate - 2024

**Above:** Overall responses. See 'How to read the survey results' on page 8 for detailed explanation.

**Left:** This chart visually compares the relative payment frequencies of each insurer 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

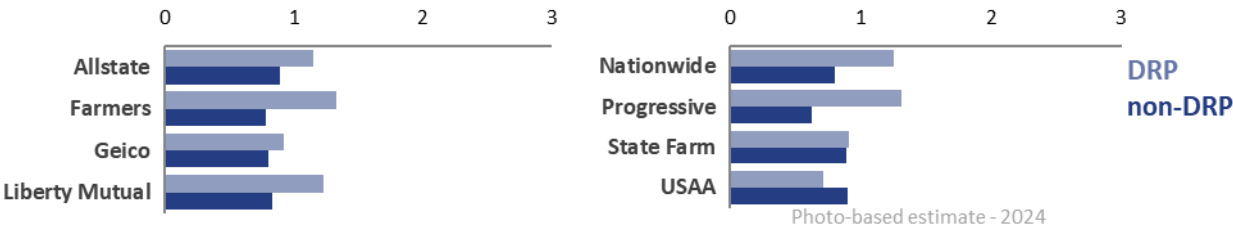


Region	Always	Most of the time	Some of the time	Never	Never asked	Responses
Great Lakes	14.3%	10.4%	22.2%	53.0%	33.5%	692
Mid-Atlantic	8.3%	15.3%	21.5%	55.0%	32.2%	357
Midwest	26.9%	13.2%	26.1%	33.8%	44.9%	425
Mountain	5.1%	12.3%	22.1%	60.5%	38.7%	318
New England	15.5%	11.5%	12.2%	60.8%	12.4%	169
Northeast	7.9%	6.5%	23.2%	62.4%	16.6%	501
Pacific Northwest	5.9%	9.4%	34.1%	50.6%	29.2%	240
South	17.9%	7.8%	13.1%	61.2%	23.5%	438
South Central	14.2%	13.8%	15.3%	56.7%	26.7%	375
Southwest	29.2%	10.7%	29.2%	30.9%	37.9%	375

Photo-based estimate - 2024

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%	5.6%	20.4%	46.3%	34.1%	82
Farmers	31.3%	10.4%	18.8%	39.6%	31.4%	70
Geico	20.8%	8.3%	12.5%	58.3%	36.8%	38
Liberty Mutual	30.0%	10.0%	13.3%	46.7%	33.3%	45
Nationwide	26.9%	9.6%	25.0%	38.5%	35.0%	80
Progressive	30.6%	13.9%	11.1%	44.4%	29.4%	51
State Farm	21.2%	6.7%	14.4%	57.7%	38.8%	170
USAA	12.9%	3.2%	25.8%	58.1%	36.7%	49
Non-DRP						
Allstate	14.4%	12.6%	20.2%	52.7%	27.5%	382
Farmers	10.3%	12.3%	22.2%	55.2%	32.1%	371
Geico	12.2%	10.4%	22.6%	54.9%	30.4%	414
Liberty Mutual	13.0%	10.5%	22.7%	53.8%	30.6%	399
Nationwide	11.8%	11.4%	22.0%	54.7%	30.2%	351
Progressive	8.8%	8.4%	18.9%	63.9%	31.2%	414
State Farm	14.1%	12.3%	21.6%	52.0%	27.0%	311
USAA	14.1%	12.0%	23.3%	50.5%	30.0%	404

Photo-based estimate - 2024

Notes from Mike

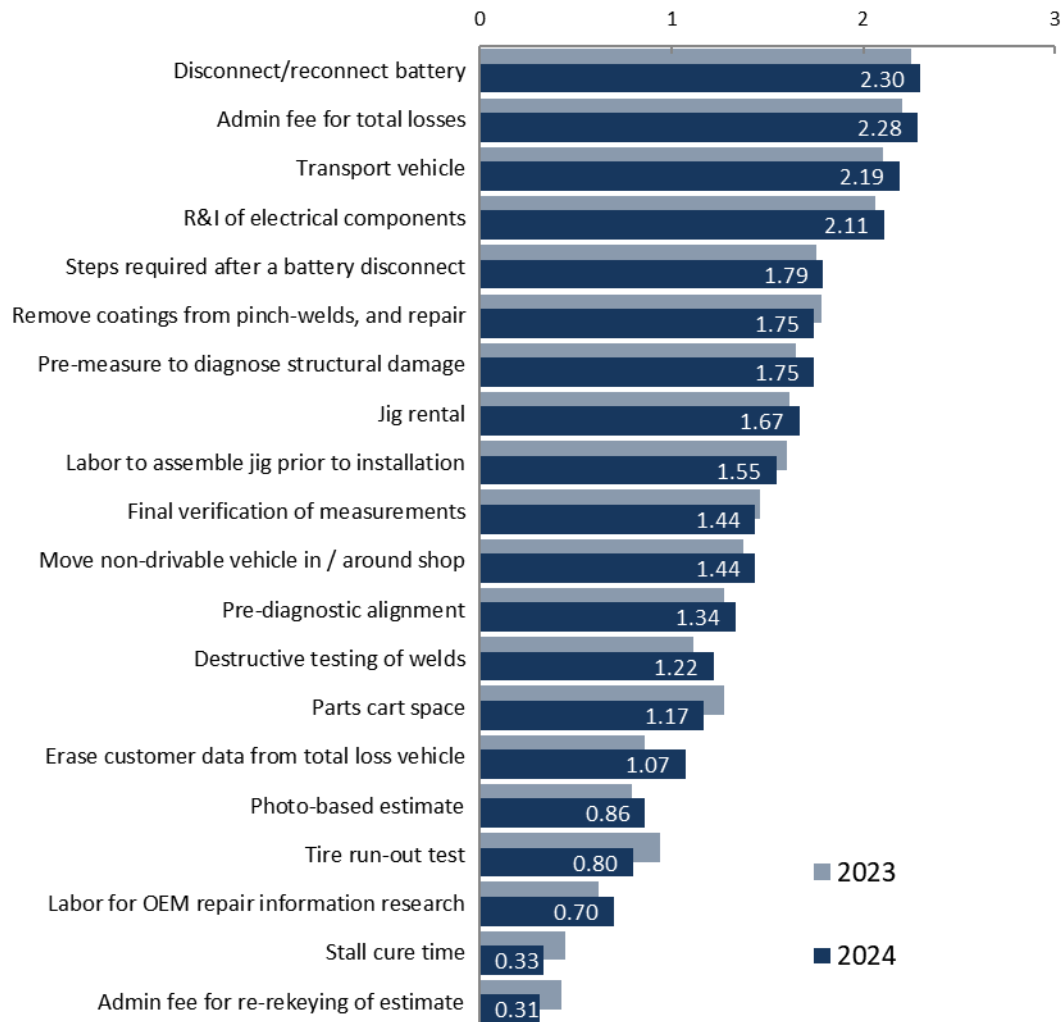
We are seeing an increase in photo-based estimating as shops are dealing with staffing shortages and don't want to see their time wasted preparing estimates for jobs they may not capture from an insurer they may have issues with.



## OVERALL RANKING

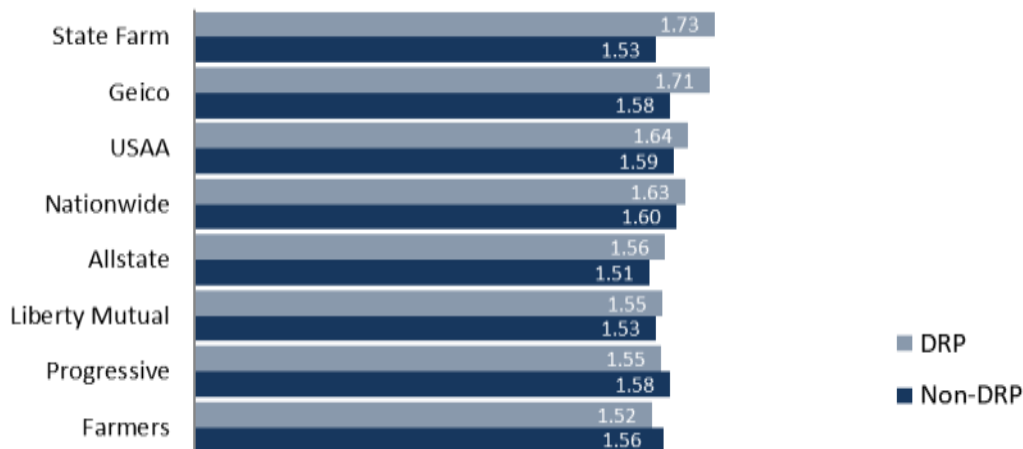
The chart below ranks relative payment frequencies for each surveyed repair operation (all insurers combined) on a scale of 0 to 3. The higher the number, the more regularly shops are billing for the procedure and being paid for it.

(See '[How to read survey results](#)' for rank calculation).



## DRP vs non-DRP

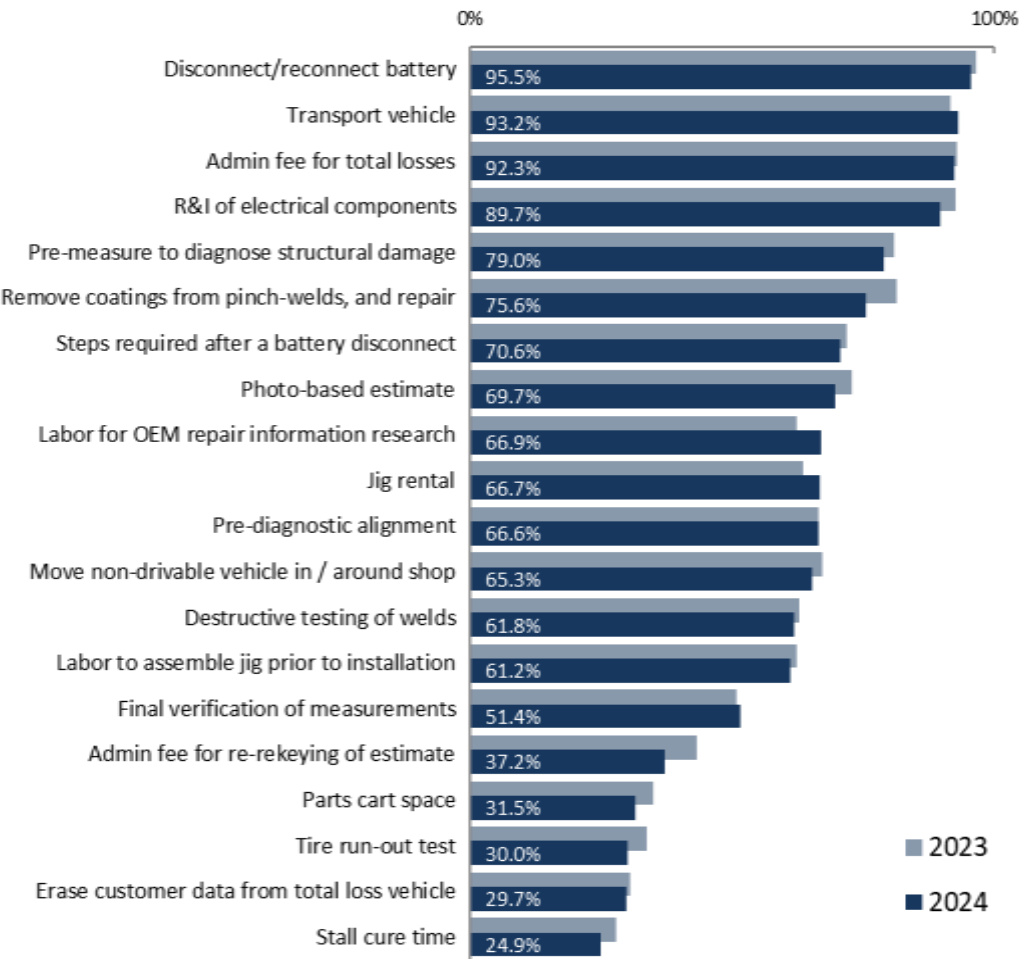
Most of the eight largest insurers are more likely to pay their DRP shops for “not-included” procedures than they are non-DRP shops, with Progressive and Farmers being the exceptions. (See '[How to read survey results](#)' on page 9 for rank calculation)



NEVER ASKED?

Percentage of shops negotiating

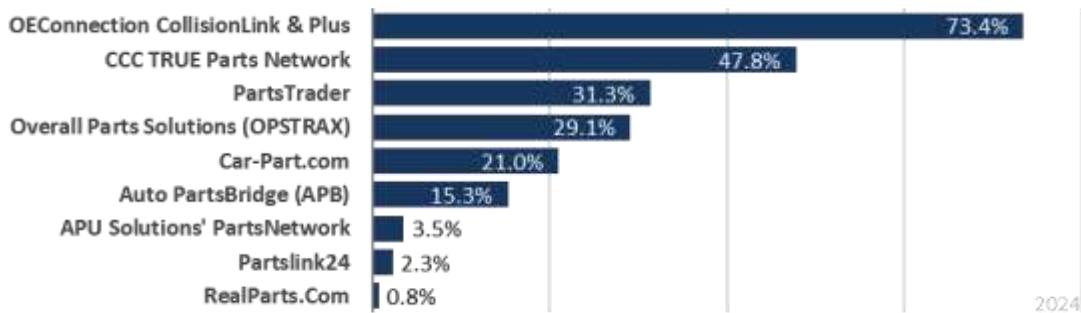
The chart below shows **the percentage of repair facilities that negotiate to be paid for the procedures listed**. The calculation assumes that if a shop did not select "Never Asked," then they are at least negotiating to be paid for that item.



## ADDITIONAL QUESTIONS

### Electronic Parts Systems

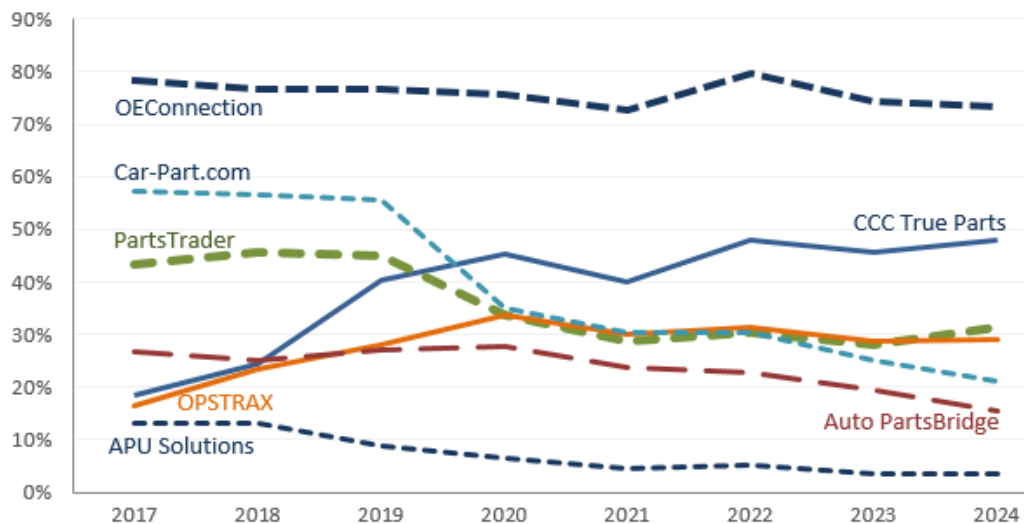
Check any of the electronic parts ordering systems in use at this location:



OEConnection is still the most commonly used system in shops with the CCC TRUE Parts Network a distant second. The OEConnection figure includes CollisionLink (62.1%) and CollisionLink Plus (11.3%).

System(s) in use	2024	2023	2022	2021	2020
OEConnection CollisionLink & Plus	73.4%	74.7%	79.7%	72.5%	75.7%
CCC TRUE Parts Network	47.8%	45.7%	47.9%	40.0%	45.3%
PartsTrader	31.3%	27.9%	30.5%	28.7%	33.7%
Overall Parts Solutions (OPSTRAX)	29.1%	28.7%	31.5%	30.1%	33.7%
Car-Part.com	21.0%	25.0%	30.3%	30.4%	35.2%
Auto PartsBridge (APB)	15.3%	19.5%	22.8%	23.9%	27.7%
APU Solutions' PartsNetwork	3.5%	3.4%	5.2%	4.5%	6.4%
Partslink24	2.3%	2.9%			
RealParts.Com	0.8%	0.6%	0.7%	0.3%	0.0%

### Systems in Use 2017-2024



I recently had the opportunity to facilitate a series of workshops with wholesale parts managers across the country on behalf of one automaker. The wholesalers definitely have a preference for which systems they use. While this survey reflects the shops' utilization and preferences, the wholesalers' frustration over having to pay for multiple systems is quite high.

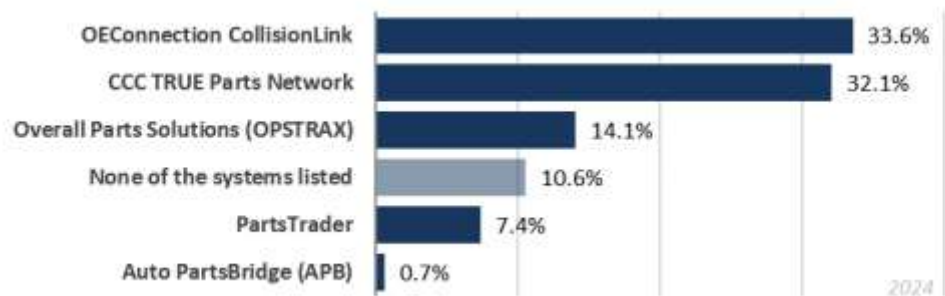
Notes from Mike



Of the electronic parts systems you use, which system would you say is used most often?



Assuming you could use any parts ordering system at your facility, which would be your PREFERRED system overall?



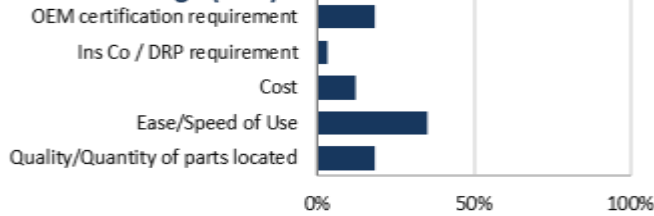
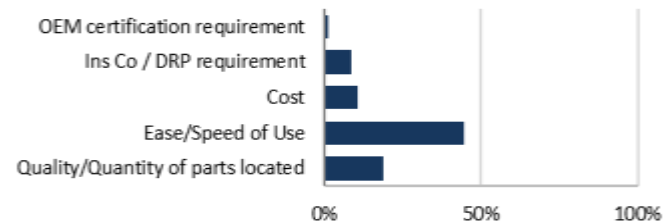
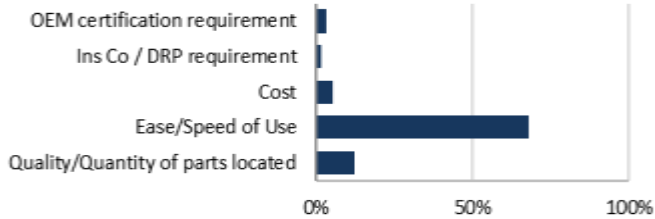
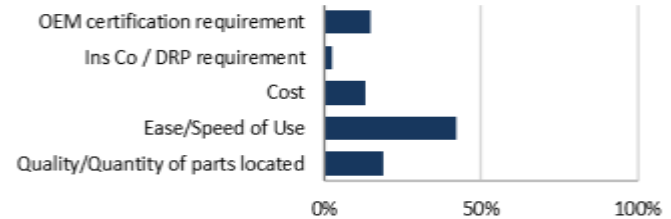
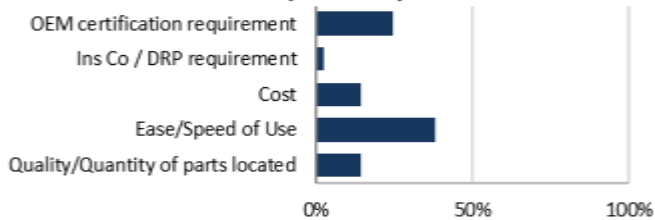
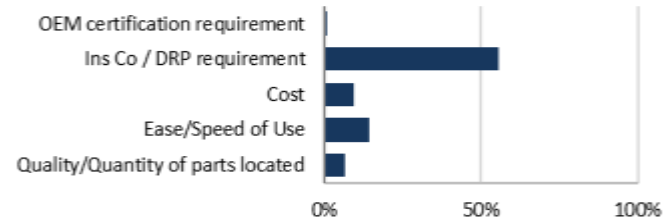
Preferred system	2024	2023	2022	2021	2020
OEConnection CollisionLink	33.6%	37.1%	34.8%	35.7%	33.8%
CCC TRUE Parts Network	32.1%	25.8%	27.6%	24.2%	29.9%
Overall Parts Solutions (OPSTRAX)	14.1%	10.0%	15.0%	11.4%	9.0%
None of the systems listed	10.6%	13.1%	8.1%	17.5%	16.3%
PartsTrader	7.4%	7.9%	6.0%	5.4%	3.4%
Auto PartsBridge (APB)	0.7%	1.2%	1.8%	1.3%	1.7%
Car-Part.com	0.0%	0.0%	1.2%	0.3%	0.7%
APU Solutions' PartsNetwork	0.0%	0.0%	0.3%	0.0%	0.2%

Just **11%** of shops still say they would prefer not to use any of the systems currently available, down from 31% in 2016.



## Electronic Parts Systems

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

**Auto PartsBridge (APB)****Car-Part.com****CCC TRUE Parts Network****OEConnection CollisionLink****Overall Parts Solutions (OPSTrax)****PartsTrader**

NOTE: Charts provided for the six systems most commonly in use in 2024.

How important to you are the following features in an electronic parts application?

Percent that rate feature "extremely important"	2024	2023	2022	2021	2020
The ability to identify one-time use parts	78.5%	75.5%	81.8%	80.5%	83.6%
The ability to accurately scrub the parts list by VIN number	77.3%	75.4%	79.4%	76.0%	81.4%
The ability to show parts availability and estimated delivery	75.3%	75.7%	77.6%	73.2%	74.5%
The ability to price-match in real-time while writing estimate	67.7%	64.1%	62.4%	68.1%	75.5%
The ability to see the same graphics as the OEM vendor parts department	63.9%	61.7%	66.0%	65.6%	73.3%
The ability to import parts invoices back into shop's management system	47.6%	45.2%	41.6%	45.9%	53.6%

*I believe that the biggest opportunity for disruption in a positive way with technology is the entire parts procurement process. CCC has rolled out a revised platform from a wholesaler's perspective and it is anticipated that CollisionLink and OPSTrax will be merged into one "new" program. I am excited to see what the future holds for electronic parts software. One of the biggest frustrations among shops and wholesalers is software that is "mandated" by industry stakeholders. We believe that collision repairers should be given freedom of choice.*

Notes from Mike



Invoicing Systems

Shops were asked whether they used an invoicing system for such items as clips/fasteners, seam-sealer and weld-through primer, and if so, which one(s)?

Systems in use	2024	2023	2022	2021	2020
3M CRiMP / 3M RepairStack	23%	22%	26%	25%	29%
Our own internal system	13%	13%	14%	11%	13%
Kent Automotive	12%	11%	11%	13%	11%
EagleMMS	8%	5%			
Auveco Products	6%	5%	6%	6%	6%
NCS' LOG1C ICS	5%	2%	1%	1%	3%
Wurth USA	5%	10%	7%	7%	11%
Other	5%	4%	5%	5%	13%
Clip Lizard	5%	3%	6%	6%	6%
Disco	2%	2%	3%	3%	2%
SEM Products Invoice Tool	1%	1%	1%	1%	1%
Winzer	1%	1%	0%	2%	2%
ASP TRACS	1%	0%	1%	1%	1%
Crest Industries	1%	3%	0%	2%	2%
Kimball Midwest True Partners	1%	0%	1%	1%	1%
Nuventory	1%	1%	1%	2%	1%

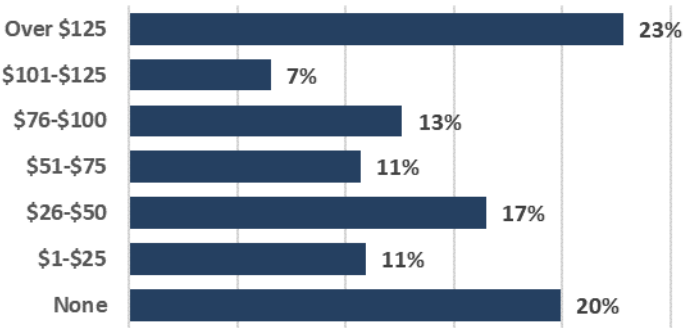
Only **31%** of shops said that their invoicing / inventory management system is integrated with their shop management system.

When the remaining shops were asked if they wished it were integrated, **68%** said yes.

**30%** of shops said they do not use an invoicing system at all

How much additional revenue per estimate on average does the use of your invoicing / inventory management system provide?

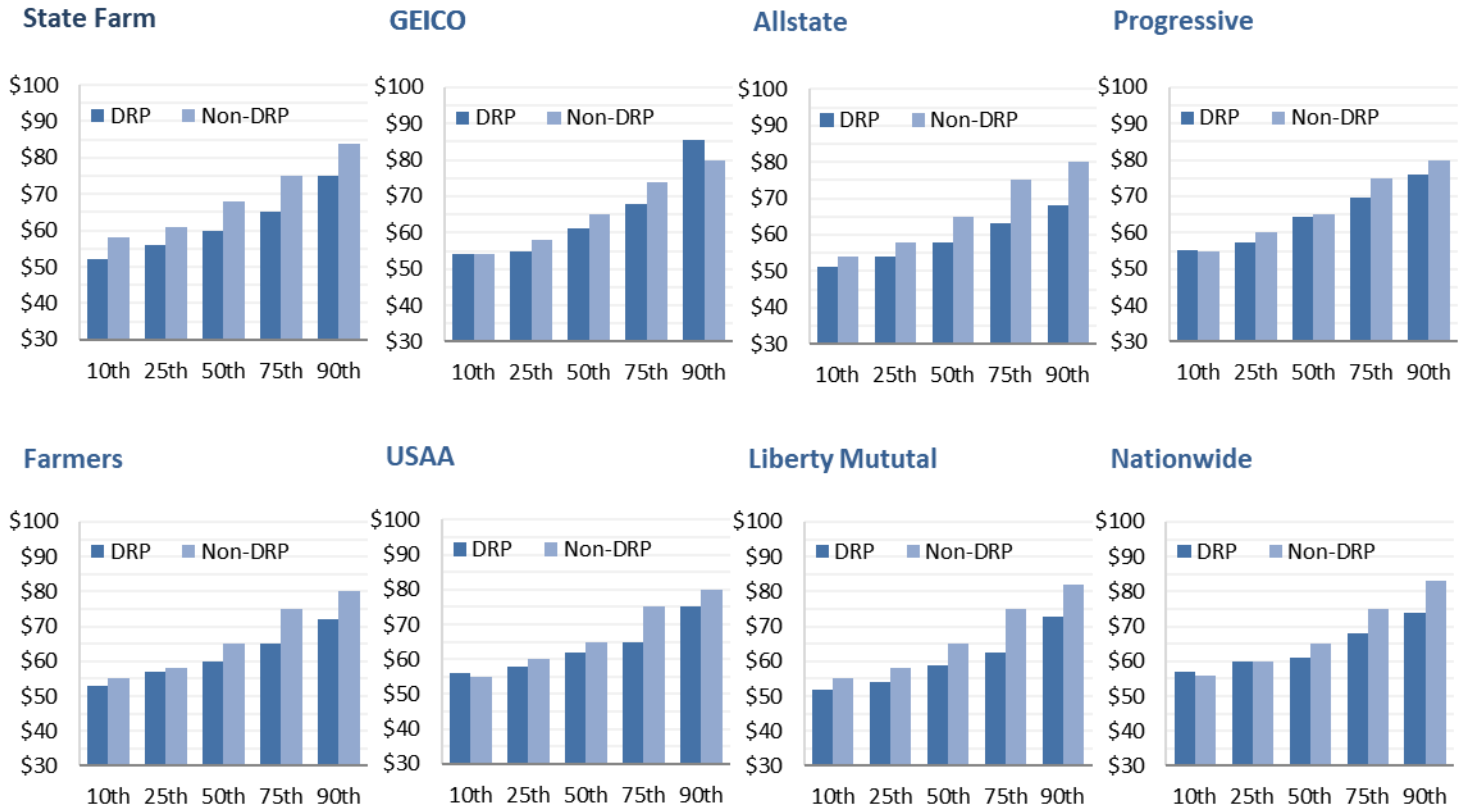
Almost 1 in 3 respondents (30%) said that using an invoicing system generates, on average, more than \$100 of additional revenue per estimate.



## Labor Rates 2024

### Body Rate

**How to read these charts:** Each percentile group shows the percentage of shops that fall above/below that dollar amount. For example, looking at State Farm, the chart shows that the 50th percentile for DRP rates is \$60. This means that 50% of respondents charge less than \$60, and the other 50% charge more than \$60 per hour. As another example on the State Farm chart, the 10th percentile for non-DRP rates is \$58 per hour. This means that only 10% of respondents charge less than this, and the other 90% of shops charge more than \$58 per hour for non-DRP body work for State Farm.



The average median non-DRP body labor rate for 2024 is \$65, that is unchanged from 2023.

For data on this over several years, see page 69.

Frame Rate

**How to read these charts:** Each percentile group shows the percentage of shops that fall above/below that dollar amount. For example, looking at State Farm, the chart shows that the 50th percentile for DRP frame rates is \$75. This means that 50% of respondents charge less than \$75, and the other 50% charge more than \$75 per hour. As another example on the State Farm chart, the 10th percentile for non-DRP frame rates is \$70 per hour. This means that just 10% of all respondents charge less than this, and the other 90% of shops charge more than \$70 per hour for non-DRP frame work for State Farm.



The average median non-DRP frame labor rate for 2024 is \$86, up from \$85 in 2023.

For data on this over several years, see page 69.

## Mechanical Rate

**How to read these charts:** Each percentile group shows the percentage of shops that fall above/below that dollar amount. For example, looking at State Farm, the chart shows that the 50th percentile for DRP mechanical rates is \$95. This means that 50% of respondents charge less than \$95, and the other 50% charge more than \$95 per hour. As another example on the State Farm chart, the 10th percentile for non-DRP rates is \$90 per hour. This means that just 10% of all shops responding to the survey charge less than this, yet the other 90% of shops charge more than \$90 per hour.



The average median non-DRP mechanical labor rate for 2023 is \$124, up from \$122 in 2023.

For data on this over several years, see page 69.

## Historical Non-DRP Rates

The following table shows the most recent three years’ median labor rates reported by shops that are not a part of the insurers’ direct repair program.

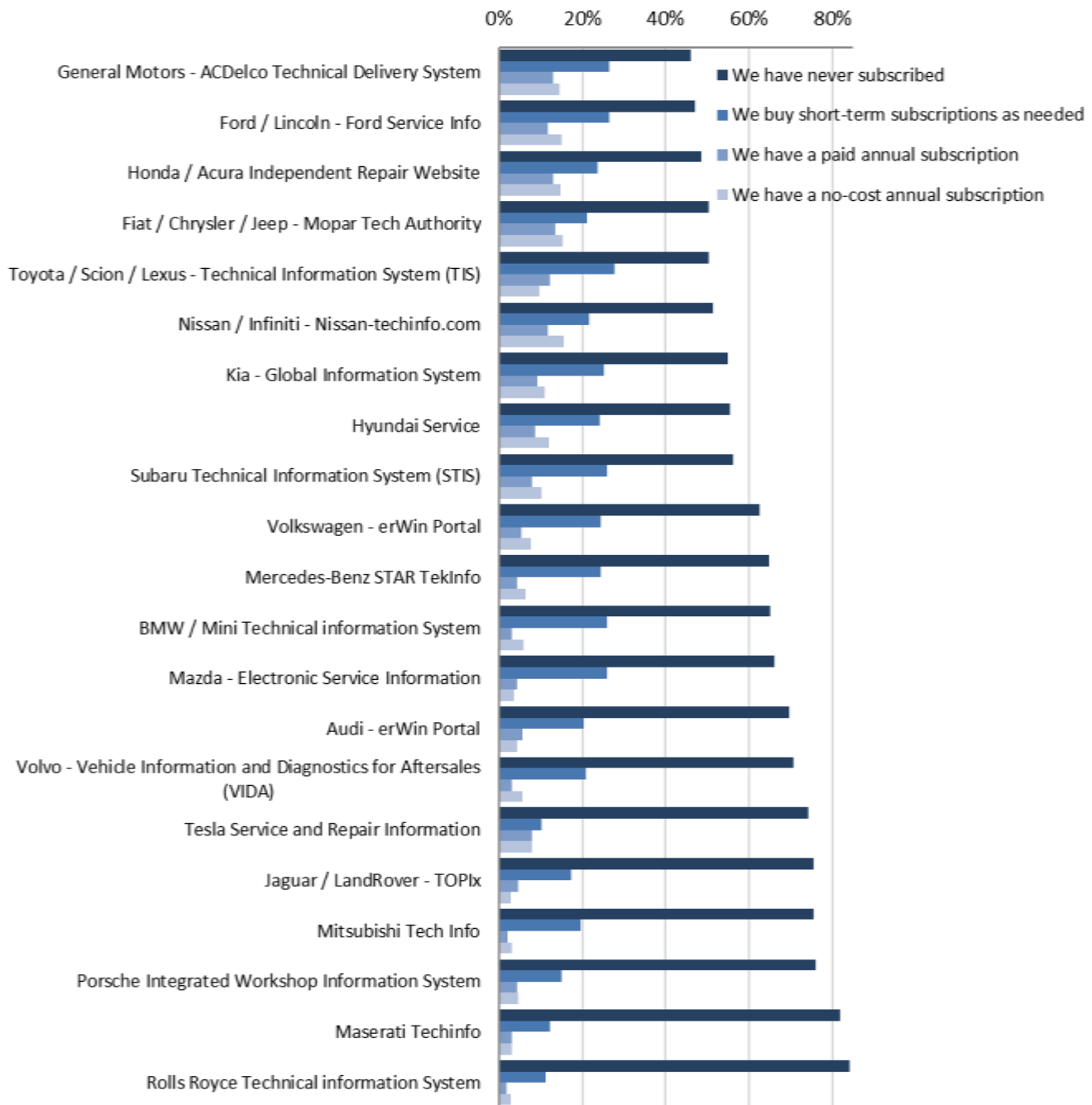
		2024	2023	2022
BODY	State Farm	68	65	62
	Geico	65	65	60
	Allstate	65	65	60
	Progressive	65	65	60
	Farmers	65	65	62
	USAA	65	65	60
	Liberty Mutual	65	65	60
	Nationwide Ins	65	65	62
	Average	65	65	61
FRAME	State Farm	90	85	80
	Geico	85	85	77
	Allstate	85	85	80
	Progressive	85	85	80
	Farmers	85	85	80
	USAA	85	85	80
	Liberty Mutual	85	85	80
	Nationwide Ins	90	85	80
	Average	86	85	80
MECHANICAL	State Farm	125	125	120
	Geico	120	120	105
	Allstate	125	120	105
	Progressive	120	117	105
	Farmers	125	120	105
	USAA	125	125	105
	Liberty Mutual	125	125	110
	Nationwide Ins	125	125	105
	Average	124	122	108



## OEM Research

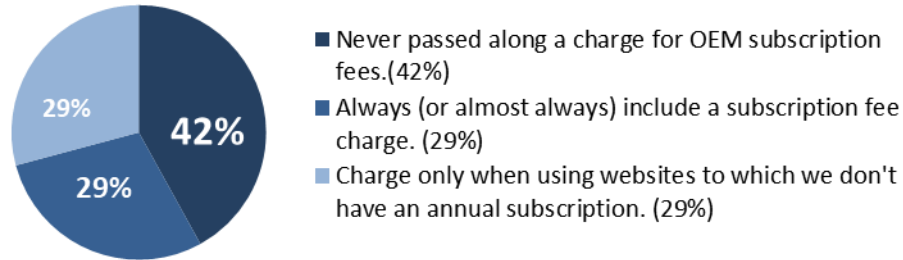
### To what extent has this location paid for direct access to OEM repair information websites?

The five automakers that shops are most likely to have an annual OEM repair information subscription (paid or no-cost subscription\*) are Fiat Chrysler (29%), Honda/Acura (28%), GM (27%), Nissan/Infiniti (27% of shops) and Ford (27%).



*\*Dealer-affiliated facilities, or shops that receive access to OEM information as a certified shop for an automaker, were asked to categorize their subscription as a "no-cost annual subscription."*

Whether or not this location bills for the time to research OEM repair information, do you add a separate line-item charge to cover subscription fees for OEM repair information?



42% of shops said they have never charged for subscription fees. That's up a bit from last year (within the margin of error), but down significantly from 51% in 2020 and 57% in 2019.

How frequently do you research OEM repair procedures at the time you write an estimate?

	2024	2023	2022	2021	2020
All the time	33%	31%	24%	21%	20%
Most of the time	28%	29%	35%	37%	33%
Some of the time	22%	23%	23%	27%	27%
Only occasionally	13%	11%	15%	13%	15%
Never	4%	6%	3%	3%	5%
Most or All	61%	60%	59%	58%	52%

Who is primarily responsible for researching OEM repair procedures?

	2024	2023	2022	2021	2020
Estimator / Blueprinter / Repair Planner only	51.0%	50.1%	51.1%	49.8%	48.8%
Estimator and technician jointly	34.9%	34.7%	32.7%	34.4%	30.6%
Other combination (i.e., manager and estimators)	5.1%				
A designated person for whom that's a primary responsibility	3.9%	3.9%	6.4%	6.1%	7.8%
Parts or production manager	3.9%	4.8%	4.5%	5.0%	5.0%
Technicians only	1.2%	2.8%	1.7%	1.7%	2.0%

Which of the following systems do you use to research OEM repair information?

OEM Information Sources	2024	2023	2022	2021	2020
ALLDATA	73%	76%	74%	73%	72%
CCC's "Repair Methods"	46%	43%	43%	43%	44%
OEM1Stop / Automaker websites	40%	47%	51%	53%	51%
I-CAR's "Repairability Technical Support"	35%	35%	43%	46%	50%
OEConnection's "RepairLogic"	29%	18%	7%		
Mitchell's "Tech Advisor"	9%	9%	12%	13%	16%
Sun	3%	2%	4%	3%	2%
AudaExplore's "TechFocus"	1%	1%	1%	1%	1%

\*totals more than 100% because multiple selections were allowed

*This research MUST be done ALL of the time. OEM information is complex and can change: I recently wrote an estimate on three of the same year and model of vehicles, but the alignment procedures and battery disconnect procedures were different based on trim levels and engine types. Remember: Learn to research, research to learn.*

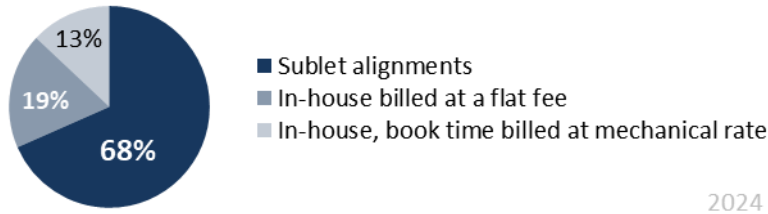
*Most automakers offer training in-person or online on how to navigate their specific repair information system. [Collision Advice's YouTube channel](#) has free webinars showing how to navigate different OEM information websites.*

Mike's Notes



## Wheel Alignments

How are wheel alignments billed at this location?



**72%**  
of shops that do in-house  
alignments, charge a flat fee

	2024	2023	2022	2021	2020
Sublet alignments	68%	65%	66%	68%	65%
In-house - flat fee	19%	21%	25%	25%	24%
In-house at mechanical rate	13%	14%	8%	7%	10%

**36%** of shops in 2024 employ a dedicated in-house mechanic  
(as opposed to a body technician that also does mechanical work)

*Remember that alignments and ADAS calibrations are often intertwined: Checking the alignment is often a necessary first step for calibrations, and any vehicle with ADAS that gets an alignment might then require some calibrations. It also might be helpful to download [this spreadsheet](#) from Hunter Engineering (which I helped them build) on not-included alignment operations.*

*I believe more shops will be looking to bring this work in-house as labor as a percentage of overall sales declines because parts (as a percentage of sales) increases. Otherwise, gross profit percentages will decline, and that will need to be reversed for shops to be profitable.*

Notes from Mike



## 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 an idea of the types of resources available.

### Database Enhancement Gateway (DEG)

“Estimate Toolbox” estimating guides (often referred to as “P-pages”) for all the estimating systems:

[Audatex](#)

[CCC Intelligent Solutions](#)

[Mitchell International](#)

### OEM / Supplier Information

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

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

I-CAR article: Back-To-Basics: Destructive Weld Testing - [I-CAR website](#)

I-CAR article: Back-To-Basics: - Pinchweld Clamps - Anchoring – UPDATE [I-CAR website](#)

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

### Society of Collision Repair Specialists

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

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

SCRS worksheet on destructive testing on spot welds - [PDF download from SCRS website](#)

### Quick Tip Videos

Road Testing Vehicles for Safe and Proper Repair - [YouTube](#)

When and Why You Need to R&I Electronics to Weld - [YouTube](#)

Battery Disconnect and Reconnect - [YouTube](#)

4 Basic Negotiation Questions - [YouTube](#)

Know the WHY Behind the Test Drive - [YouTube](#)

Destructive Test Welds - [YouTube](#)

Prep Pinch Welds Before & After Clamps - [YouTube](#)

Get it straight! Pre-diagnostic Alignment and measurements - [YouTube](#)

Why Pre-Diagnostic Alignment is Critical to the Repair - [YouTube](#)

Mobilizing a Disabled Vehicle - [YouTube](#)

SCRS Education Committee

### SCRS Education Committee videos

Squeeze-Type Resistance Spot Welding - Welder Settings & Test Welds - [YouTube](#)

Maintenance and Setup on MIG/MAG Welders - [YouTube](#)

### National Automobile Dealers Association

Personal Data in Your Car – [Adobe pdf](#)

## Articles by Mike Anderson

**Alignments Too Critical for Collision Repair Shops to Not Do Them In-House**

*Autobody News (January 4, 2023) - [Autobody News website](#)*

**What You're Missing by Not Researching Battery Disconnect and Reconnect Procedures**

*Autobody News (November 8, 2022) - [Autobody News website](#)*

**Destructive Weld Testing a Crucial Step You Should Be Paid to Perform**

*Autobody News (March 8, 2022) - [Autobody News website](#)*

**Tips to Help Auto Body Shops Get Paid for Crucial Step of Destructive Weld Testing**

*Autobody News (April 4, 2022) - [Autobody News website](#)*

**Determining Whether - and How - to Charge for OEM Research**

*Autobody News (June 4, 2020) - [Autobody News website](#)*

**4 Questions to Consider Ahead of Negotiating for any 'Not-Included' Estimate Line Item**

*Autobody News (October 5, 2018) - [Autobody News website](#)*

## CRASH Network

CRASH Network subscribers receive regular coverage of "Who Pays for What?" survey results including additional analysis of the data and topics covered such as the following (subscription required to access these links):

**Changes to Mitchell p-pages** (destructive weld testing) (March 18, 2024)

**Reconnecting battery requires more than a wrench** (October 30, 2023)

**Removing coatings from pinch welds** (October 23, 2023)

**Performing tire run-out tests** (September 10, 2023)

**Parts taking up valuable space in the shop** (July 10, 2023)

**Data clearing as a service** (September 5, 2022)

**Battery-related procedures increasingly detailed** (October 31, 2022)

**Administrative fees not allowed in California** (July 12, 2021)

**Prevalence of total loss fees continues to rise** (October 24, 2022)

**Following OEM procedures when reconnecting batteries** (October 11, 2021)

**Getting paid to move an immobile vehicle** (October 19, 2020)

**Comparison of 'Who Pays' data shows improvement** (October 7, 2019)

**Following adhesive cure time requirements** (March 26, 2018)

**More on welding, destructive testing** (November 18, 2019)

**OEM websites sometimes include 'stronger' verbiage** (March 12, 2018)

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