

Action Item	Created When	Completed Actions	Overdue Actions
<p>00. Send Client Welcome Letter Assigned to Office Staff when the claim is originated.</p> <p>Due after 2 days.When completed, 2 actions will be executed.If overdue, 2 actions will be executed.</p>	Claim is Originated	Set Claim Phase: Estimating	Send Email: Group / Executive
<p>01. Send Letter of Representation to Insurance Carrier Assigned to Adjuster when the claim is originated. This action item will be marked critical.</p> <p>Due after 1 day.When completed, 2 actions will be executed.If overdue, 1 actions will be executed.</p>	Claim is Originated	Set Claim Phase: Scheduling Inspection Add Log Entry Notification-Insurer Notified Loss	Send Email: Group / Office Manager
<p>02. Assign Public Adjuster Assigned to Office Staff and Adjuster when a task is completed.</p> <p>Due after 1 day.When completed, 2 actions will be executed.If overdue, 1 actions will be executed.</p>	Task is Completed: 01. Send Letter of Representation to Insurance Carrier	Add Log Entry Send Email: Role/ Adjusters	Send Email: Group / Adjuster Manager
<p>03. Request documents from Insurance Company Assigned to Office Staff when a task is completed. This action item will be marked critical.</p> <p>Due after 3 days.When completed, 1 actions will be executed.If overdue, 2 actions will be executed.</p>	Task is Completed: 02. Assign Public Adjuster	Add Log Entry Documents requested from insurance company: %description%	Send Email: Group / Executive / Office Staff
<p>04. Receive all documents from Insurance Company Assigned to Office Staff when a task is completed. This action item will be marked critical.</p> <p>Due after 10 days.When completed, 1 actions will be executed.If overdue, 1 actions will be executed.</p>	Task is Completed: 03. Request documents from Insurance Company	Add Log Entry Documents received from Insurance Company: %description%	Send Email: Group / Executive

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<p>05. Policy Review Assigned to Adjuster when a task is completed.</p> <p>Due after 2 days.When completed, 1 actions will be executed.If overdue, 1 actions will be executed.</p>	<p>Task is Completed: 04. Recieve all documents from Insurance Company</p>	<p>Set Claim Phase : Under Review</p>	<p>Send Email : Group / Adjusters</p>
<p>06. Schedule Inspection With Carrier Assigned to Contents Adjuster and Office Staff when a task is completed.</p> <p>Due after 10 days.When completed, 4 actions will be executed.If overdue, 2 actions will be executed.</p>	<p>Task is Completed: 05. Policy Review</p>	<p>Set Claim Phase: Scheduling Inspection Add Log Entry Scheduling - Appointment with Insurance Adjuster for %date% at %time% cancelled Send Email: Group / Office Manager / Client</p>	<p>Send Email : Group / Executive / Office Manager</p>
<p>07. Complete Inspection Assigned to Executive and Adjuster when a task is completed. This action item will be marked critical.</p> <p>Due after 5 days.When completed, 1 actions will be executed.If overdue, 1 actions will be executed.</p>	<p>Task is Completed: 06. Schedule Inspection with Carrier</p>	<p>Set Claim Phase: Planning</p>	<p>Send Email: Group / Executive</p>
<p>08. Send Proof of Loss to Insurance Carrier Assigned to Contents Adjuster and Adjuster when a task is completed. This action item will be marked critical.</p> <p>Due after 20 days.When completed, 1 actions will be executed.If overdue, 1 actions will be executed.</p>	<p>Task is Completed: 07. Complete Inspection</p>	<p>Add Log Entry POL- Proof of Loss submitted to Insurer</p>	<p>Send Email: Group / Office Manager</p>

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<p>09. Negotiate / Finalize Amount of Loss Assigned to Adjuster when a task is completed.</p> <p>Due after 36 days.When completed, 1 actions will be executed.If overdue, 1 actions will be executed.</p>	<p>Task is Completed: 08 Send Proof of Loss to Insurance Carrier</p>	<p>Set Claim Phase: Negotiation</p>	<p>Send Email: Group / Adjuster Manager</p>
<p>10. Send Thank You Letter/Satisfaction Survey to Client Assigned to Office Staff when the claim enters phase "Ready to Close".</p> <p>Due after 3 days.</p>	<p>Claim Enters Phase: Ready to Close</p>		
<p>BILLING 01. Send Invoice to Client Assigned to Finance when the claim enters phase "Billing". This action item will be marked critical.</p> <p>Due after 2 days.When completed, 1 actions will be executed.If overdue, 1 actions will be executed.</p>	<p>Claim Enters Phase: Billing</p>	<p>Add Log Entry: Billing - Client Invoice Sent</p>	<p>Re-assign: Group / Finance</p>
<p>BILLING 02. Received Payment for Invoice from Client Assigned to Finance when a task is completed. This action item will be marked critical.</p> <p>Due after 10 days.When completed, 2 actions will be executed.If overdue, 1 actions will be executed.</p>	<p>Task is Completed: Billing 01. Send Invoice to Client</p>	<p>Add Log Entry: Billing - Client Invoice Paid Send Email: Adjusters</p>	