

Referral

Front End

Back End

Executing and Follow up on
Co-Marketing Contacts
|
[name]

New Partnerships
|
[name]

Prospecting
|
[name]

Quarterly Check - in
|
[name]

Invoicing Clients
|
[name]

Closing
|
[name]

Confirm admin spend
|
[name]

Sales Force Campaign Object
|
[name]

Weekly Reports to Partners
|
[name]

Training For Staff
|
[name]

Day to Day Questions
|
[name]

Script/Criteria
Confirmation w/ Partners
|
[name]

Paperwork Retrieval
|
[name]

Writing Co-marketing
Contracts
|
[name]

FB Spend Comn
|
[name]

Create Reports & New
Dashboards for Partners
|
[name]

Paperwork Retrieval
|
[name]

Ensure Report Accuracy
|
[name]

Primary Contacts
Confirmation
|
[name]

Prepping Data for Partners
|
[name]

Communicate New Ads to
Marketing
|
[name]

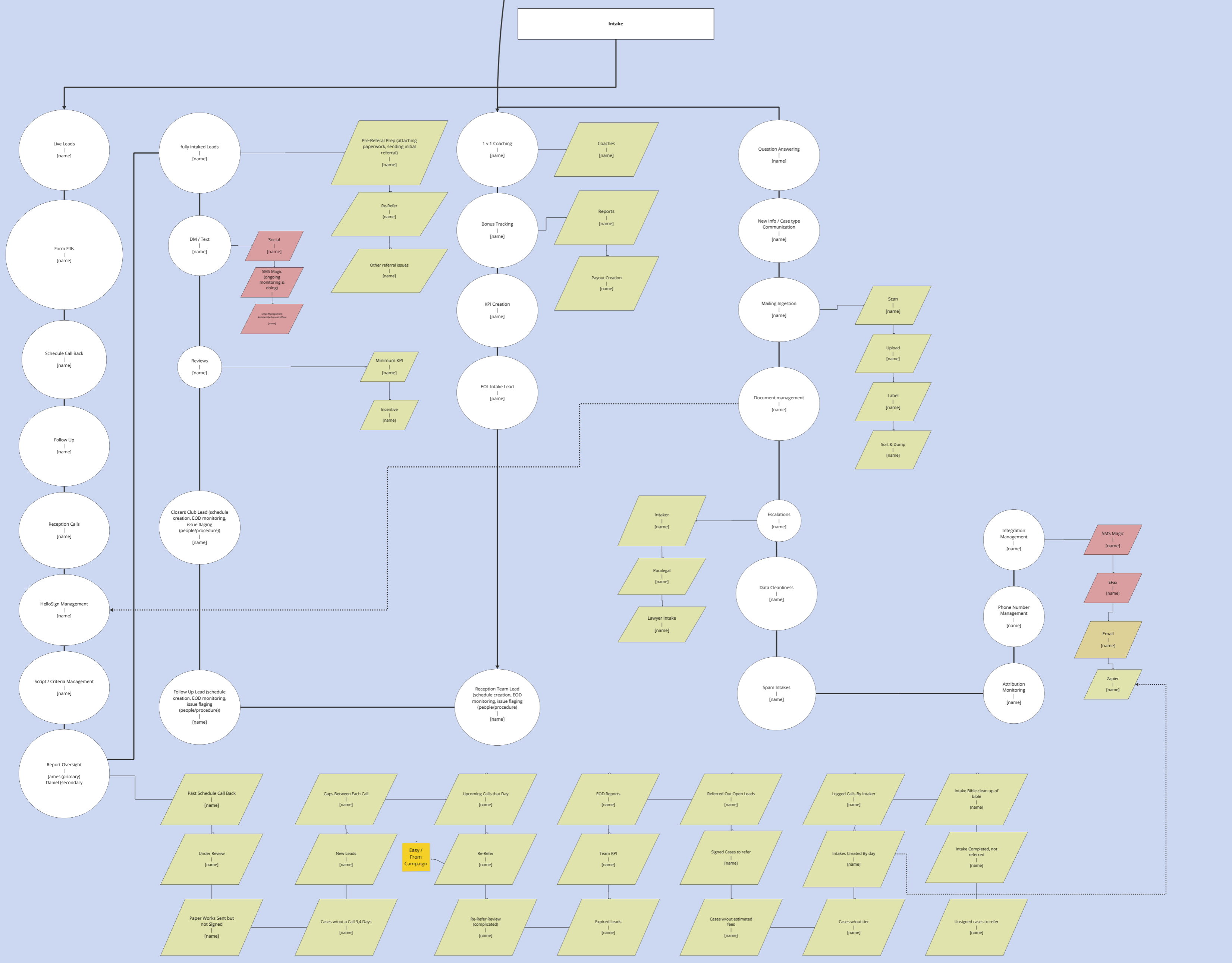
Firm Object Cleanliness
|
[name]

Check Retrieval
|
[name]

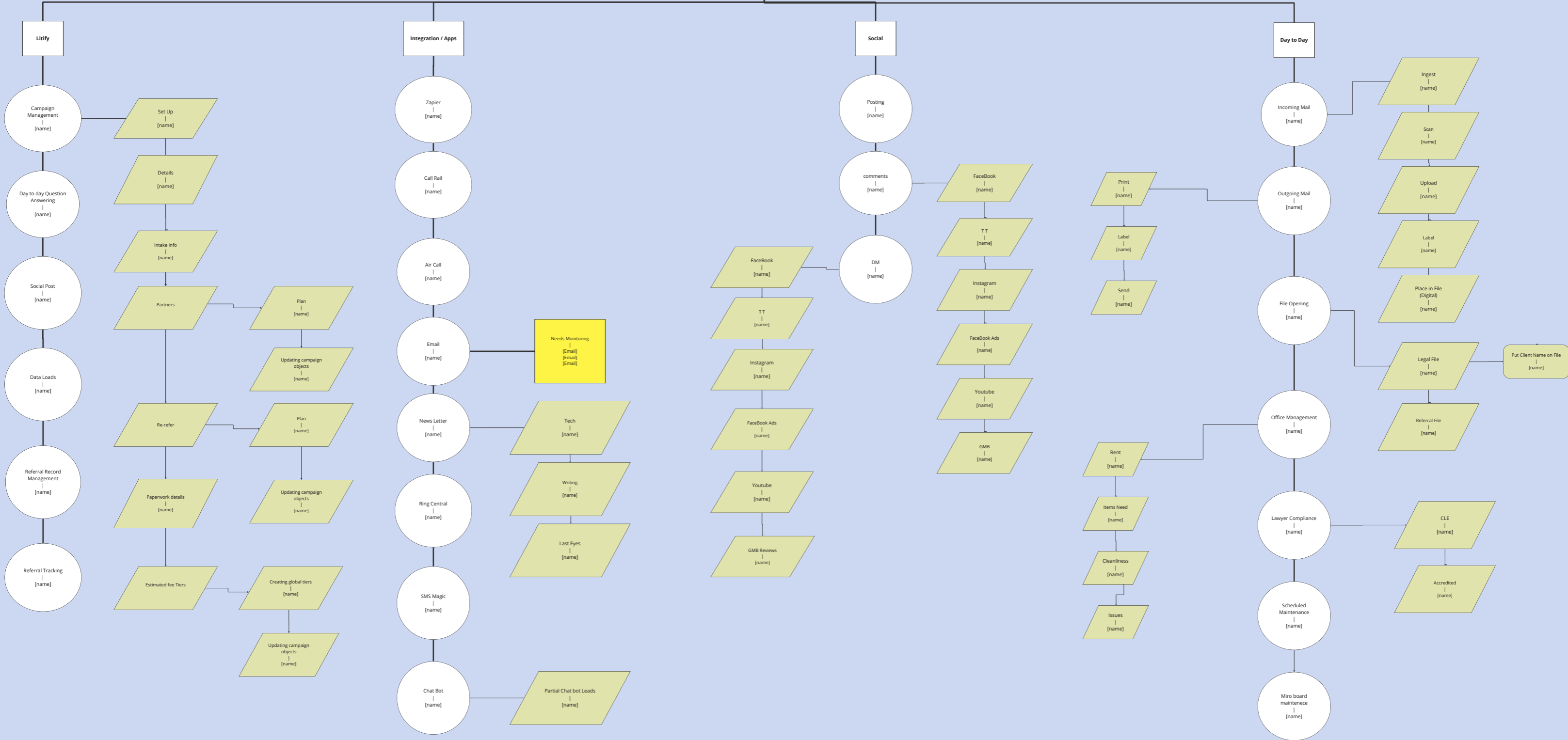
Scan
|
[name]

QB Management
|
[name]

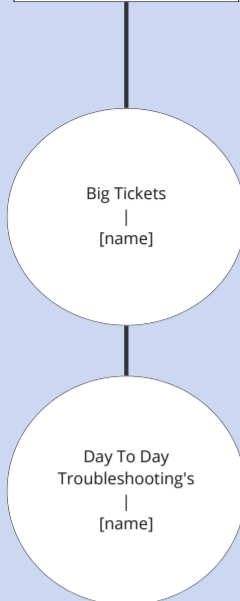
Document in Lityfy
|
[name]



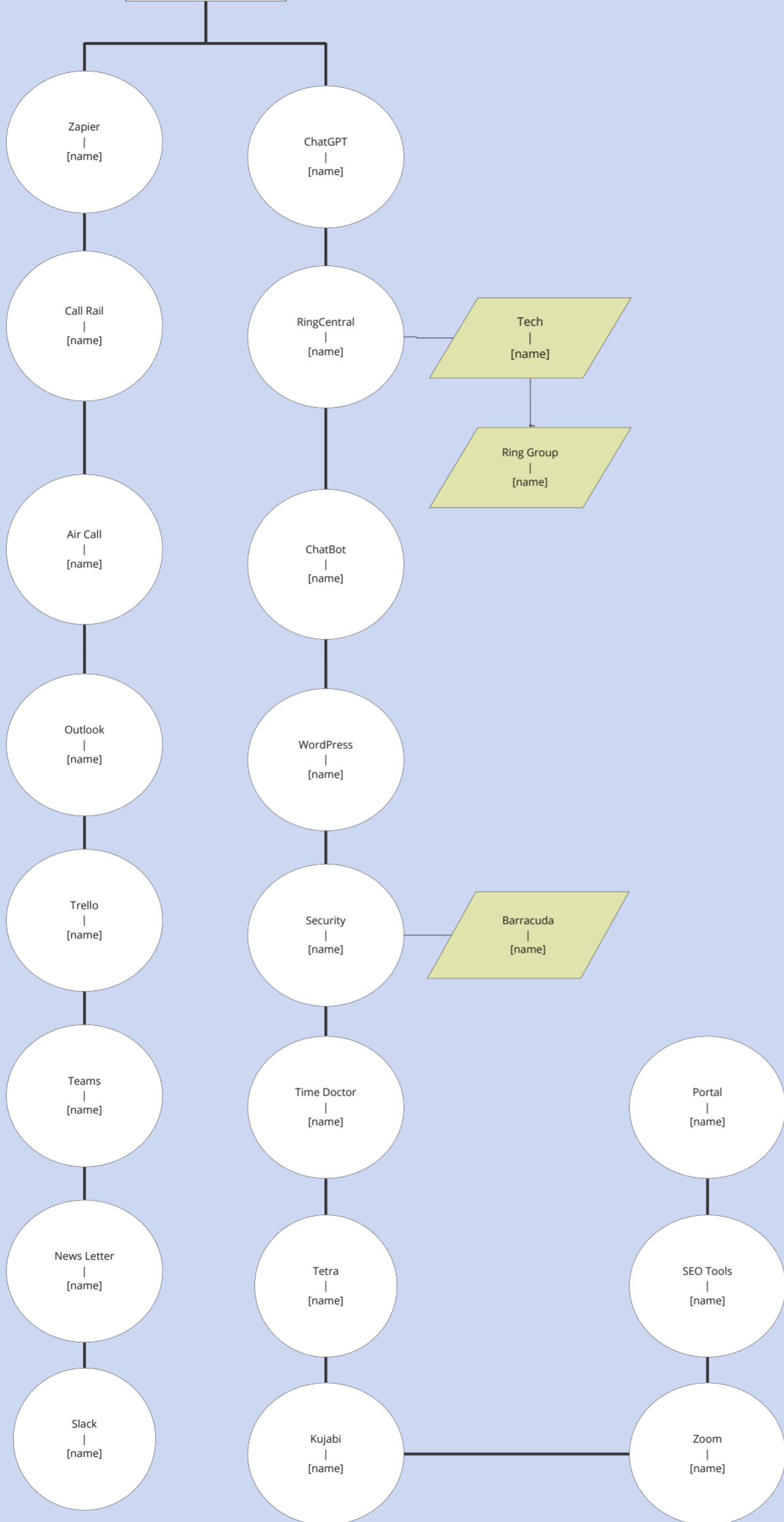
ADMIN



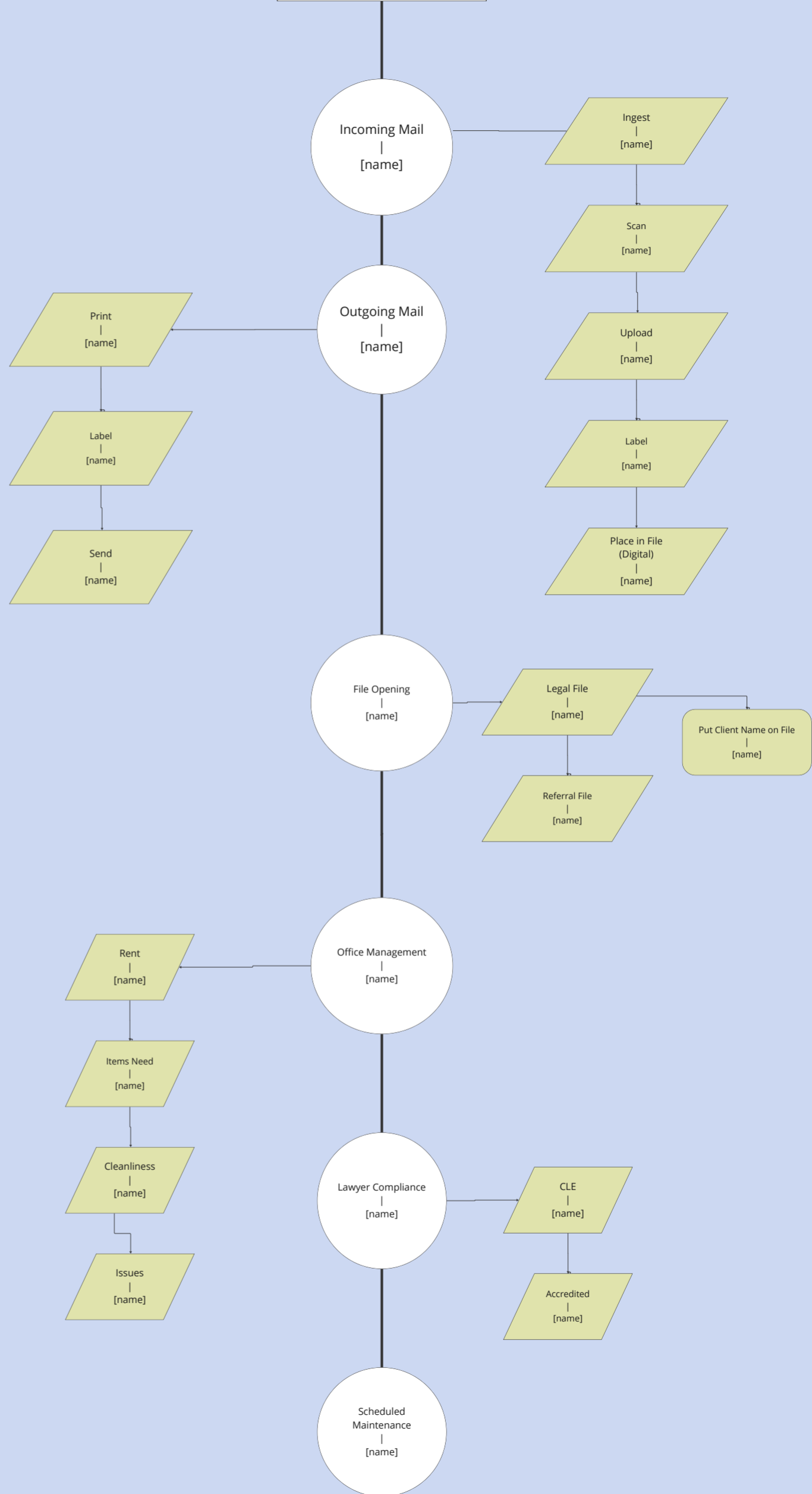
Litify

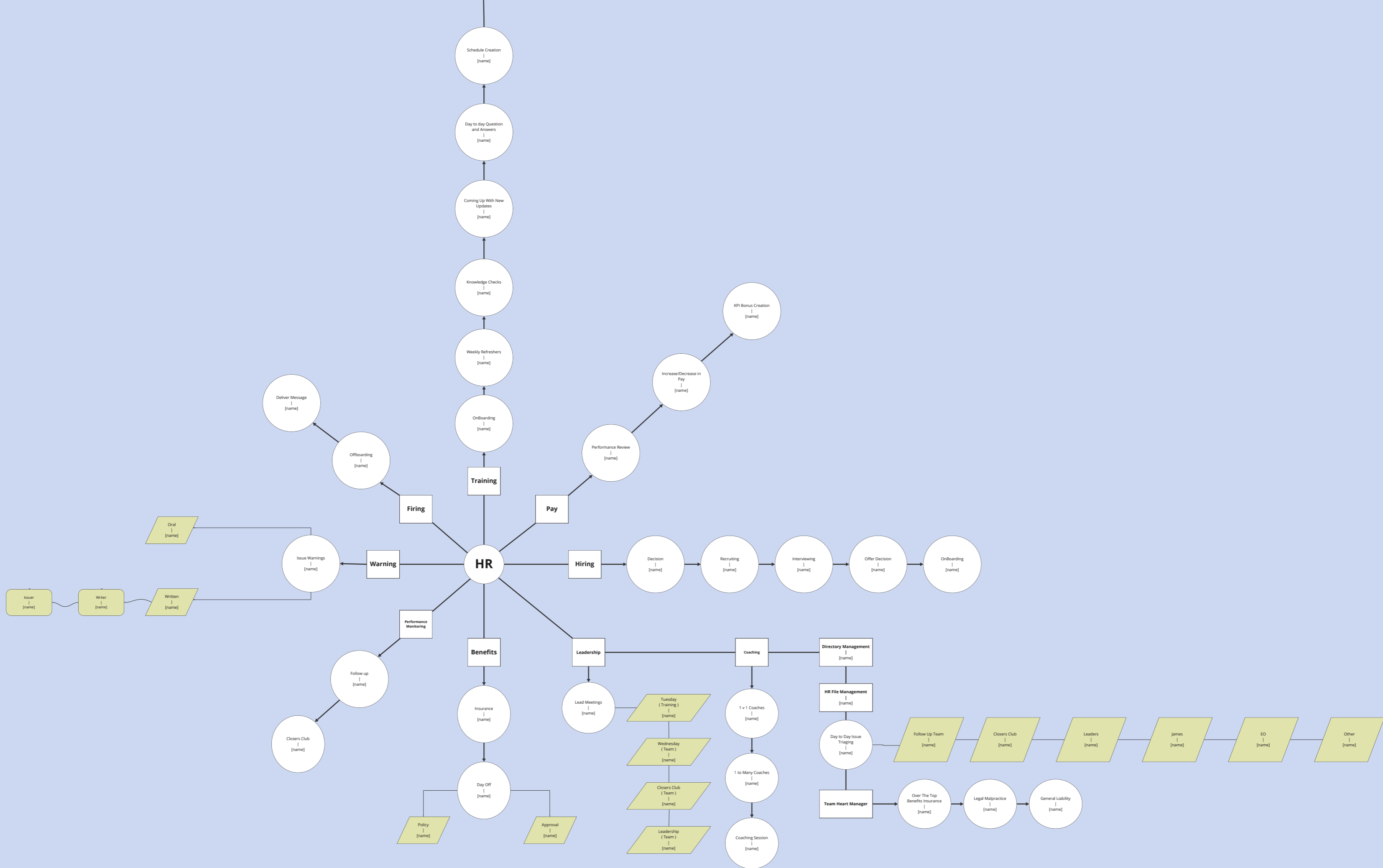


Integration / Apps



Day to Day





Finance

Resolution Tracking
|
[name]

Invoicing
|
[name]

Book Keeping
|
[name]

Check Cashing
|
[name]

Check Writing
|
[name]

Forecasting
|
[name]

AD Budgeting
|
[name]

TAX
|
[name]

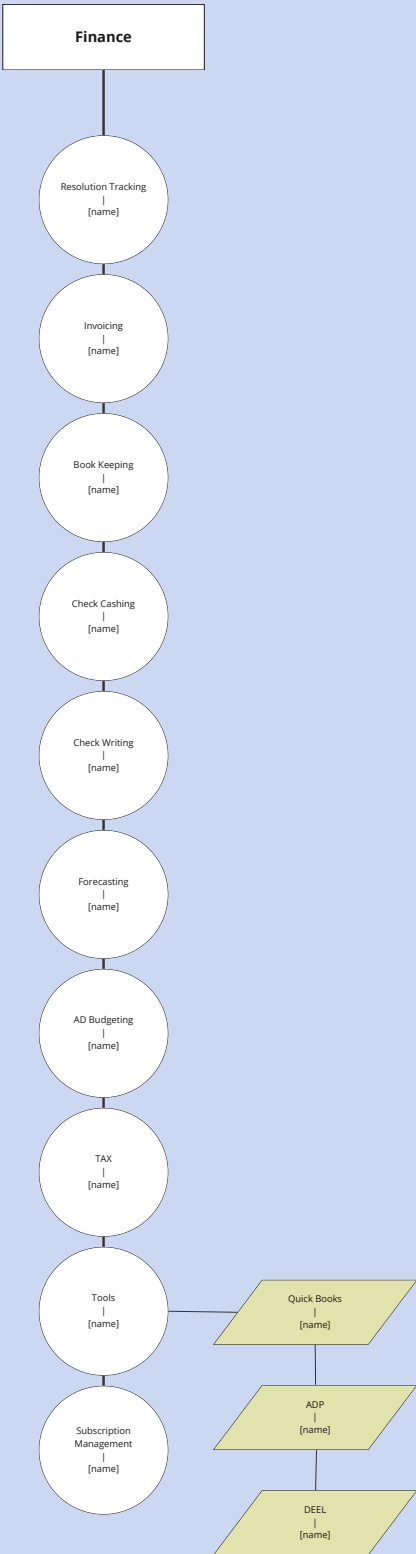
Tools
|
[name]

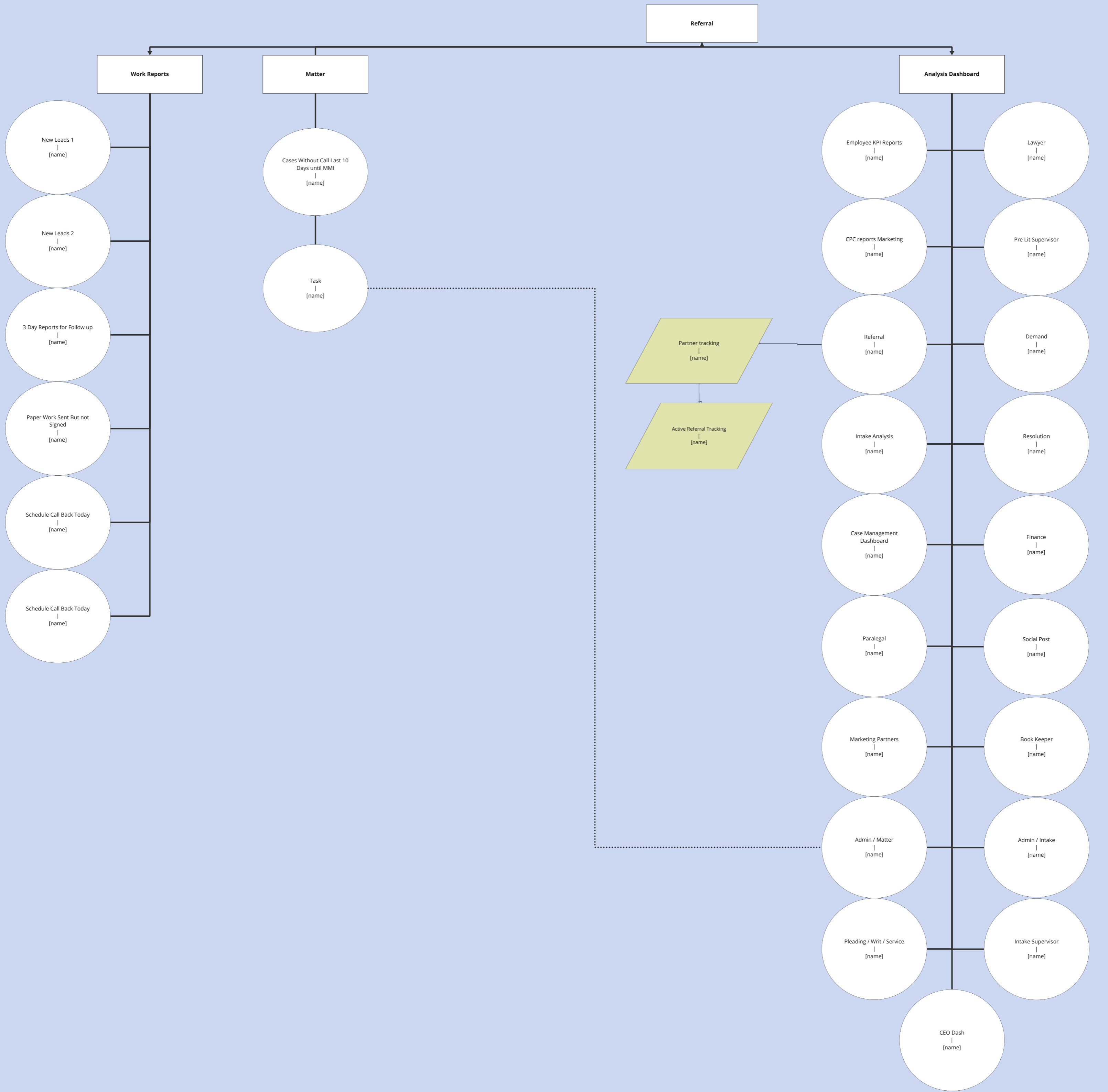
Subscription Management
|
[name]

Quick Books
|
[name]

ADP
|
[name]

DEEL
|
[name]





ROLES

Pre-Lit Attorney Supervisor

TASK

NAMES
Place value on matter and set up case

Pre-Lit General Supervisor

TASK

NAMES
Assign case manager

RM

TASK

NAMES
Complete Pre-Lit Introduction call & onboarding

NAMES
Email Welcome Package

NAMES
Send affidavit of no insurance to client

NAMES
Client Retrieval - Retrieve affidavit of no insurance

NAMES
Client Retrieval - Vehicle Photos

NAMES
Client Retrieval - Injury Photos

NAMES
Client Retrieval - Health Insurance Front and back

NAMES
Fill out application for benefits with client over phone call

Admin - notice

TASK

NAMES
Place DHS on notice through portal

NAMES
Send app for benefits to PIP

NAMES
Place DHS on notice through portal

NAMES
Add 1P Insurance info to Insurance tab

NAMES
Add Health insurance record to insurance tab

NAMES
Send 3P letter(s) of representation

NAMES
Send Subrogation Ltr to health insurance co

NAMES
3P retrieval - Acknowledgement letter

NAMES
Check Child Support Portal & Add Damage if Necessary

NAMES
3P retrieval - recorded statement

NAMES
Generate 1P letter of representation & Retrievals doc

NAMES
Add 3P Insurance info to Insurance tab

NAMES
1P retrieval - Acknowledgement letter

NAMES
Enter PIP Limits

NAMES
1P retrieval - Dec Page

NAMES
Retrieve police report

NAMES
1P retrieval - Tort Form

NAMES
Retrieve updated PIP log/ledger from 1P

NAMES
1P retrieval - Recorded Statements

NAMES
Sort PIP File

NAMES
1P retrieval - App for benefits

NAMES
Retrieve Health Insurance Lien

NAMES
1P retrieval - Waivers for UM/UIM

NAMES
Generate treating providers insurance letter

NAMES
1P retrieval - Copy of the Name/Driver Exclusion form

NAMES
Generate employer letter regarding wages

NAMES
Client Retrieval - Received Doctors note for missed work

NAMES

NAMES

Admin - medical

TASK

NAMES
Request all medical records for demand