**TPBI DEPARTMENT CASE FOLLOW UP**

**SYNOPSIS**

Upon registering a new case and during investigation, the people involved in the accident might be residing at a different state. It can be of people or businesses connected with the case located at a different state.

Due to the above there is a need of assigning adjusters from branches or HQ to attend to a particular task with regard to the case.

The main adjuster investigating the case will put a request to his manager for the particular task to be assigned to another branch or HQ. Upon the manager’s approval the task will be send out to a particular branch or HQ.

The tasks can be many and not limited to one particular branch or HQ.

Currently it is being done manually and most of the times we will have problems on tracing the task and adjusters will not attend at the required timeline. There are also issues on claim reimbursements.

We would like to suggest the following;

1. When a task created for a case, there should be a sub-reference number attached to the task and to automatically create a timeline to complete the task. Current timeline is 14 days, we should be allowed to increase or decrease the timeline.
2. The sub-reference will be used to generate the claim reimbursement for the attending adjuster.

**SUGGESTED PROCESS FLOW**

1. Create follow up

The main adjuster creates the follow up request attached to a case; the request goes to the manager for approval.

1. Approval by manager

The related manager of the department approves the follow up and assigns the follow up to a particular branch or HQ.

1. Approval by branch / hq

The receiving branch manager acknowledges the follow up and assigns the follow up to an adjuster.

1. The adjuster acknowledges the follow up and proceeds with the follow up, once the follow up is completed, the adjuster uploads the report into the system.
2. The receiving manager approves the report.
3. The main adjuster will be able to use the follow up report.

To create a dashboard to track the follow up assignments.