

<b>Subject: Natural Disaster Plan of Action 2024</b>	<b>Product: Client Success</b>	<b>Approved on:</b>
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**Purpose:**

Outline the process for working with clients during Natural Disasters.

**Policy:**

The goal is to maintain open communication, set proper client expectations, and ensure initiative-taking follow-up while adjusting settlement parameters to meet clients' needs.

**Procedure:**

**Open Client RecordSetting Client Expectations**

- Show empathy and understanding toward clients who are facing challenges due to the hurricane.
- A request will be submitted for available options with their creditors for their active settlements.
- We will notify the client within 30 days of their next scheduled creditor payment.
- Submit requests to PRT according to the steps below.
- Ensure you check your client request queue daily for submitted requests.
  - It is your responsibility to ensure timely client follow-up within 24hrs of response from PRT.

**Documentation of Client Impact**

- Agents must notate the specific hurricane or incident that has impacted the client in their account file for reference in all communications.

**Communication and EMT Queue Process**

- The customer service specialist will send the request to the responder in the **EMT queue** for resolution.
  - Customer Service specialist will submit a new request type – **CS PRT Communication**
  - If the settlement remains intact or is canceled, the responder will communicate the outcome back to the customer service specialist for further action.

<b>Latest Date: 10/21/2024</b>	<b>Page 1 of 4</b>	<b>Author of Latest Revision: Samantha Shumaker</b>
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<b>Subject: Natural Disaster Plan of Action 2024</b>	<b>Product: Client Success</b>	<b>Approved on:</b>
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### Example Request

- Request type – CS PRT Communication

The screenshot shows a web form with several dropdown menus and a checkbox. Red rectangular boxes highlight the following fields:

- Related Creditor:** A dropdown menu showing "Zwicker and Associates ( ) - Settled - \$3,954.00".
- Request Type \*:** A dropdown menu showing "CS PRT Communication".
- Responder\*:** A dropdown menu showing "emtqueue - EMT Queue".
- Processor:** A dropdown menu showing "Roy Espinal".

Below the highlighted fields, the following information is visible:

- Responder Name:** EMT Queue
- Internal Status:** A dropdown menu showing "Waiting For Responder".
- Urgent:** An unchecked checkbox.

### Request Notes

- Include why the client is unable to make a payment towards their creditor(s).
- Include specific details of the draft changes made in the program.
  - Include date impacted
  - Include amount changed
  - Include rescheduled date (if applicable)

<b>Latest Date:</b> 10/21/2024	<b>Page 2 of 4</b>	<b>Author of Latest Revision:</b> Samantha Shumaker
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**Request**

Hurricane Milton has impacted the client to make a payment which is affecting Zwicker Associates  
Date Impacted - 10/22/2024  
Amount Changed - Change draft amount to \$100  
Reschedule Date - 11/22/2024

#### Client Contact by Client Success Team

- The submitting agent must complete a daily request queue inspection for updates.
- Once the request is flipped to the processor (the submitter), client follow-up must happen within 24 hours.
- If more than 30 days have passed since the request was submitted and no resolution provided by PRT or client calls in escalated within 30 days, specialist must complete the following.
  - Call client to ensure we're still working on the request submitted.
  - Send follow up to the PRT agent assigned to the request submitted.
  - Add detailed notes to the request and Quickbase, that a follow up was completed with both the client and PRT agent.
  - If there is no response from PRT within 24-48 hours, follow the escalation process below.

#### Client Success Team - **Escalation Process**

- **Post 30 days Follow-Up:** The customer service specialist will follow up with the client within 30 days to inform them of the settlement outcome.
- **Send a follow-up message to the PRT agent:** Send a follow-up email to the PRT agent assigned to the request regarding the outstanding issue.
- **Contact your Manager:** If the assigned PRT agent does not respond within 24-48 hours of the follow-up email, escalate the issue to your manager. The CS Specialist will send an email to their manager and inform them of the delay and request immediate action.
  - ***CS Managers will reach out to the PRT leadership for details regarding request submitted by CS Specialist.***

<b>Latest Date:</b> 10/21/2024	<b>Page 3 of 4</b>	<b>Author of Latest Revision:</b> Samantha Shumaker
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In the printed form this is an uncontrolled document. The official version can be found online.

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<b>Latest Date: 10/21/2024</b>	<b>Page 4 of 4</b>	<b>Author of Latest Revision: Samantha Shumaker</b>
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