Purpose:

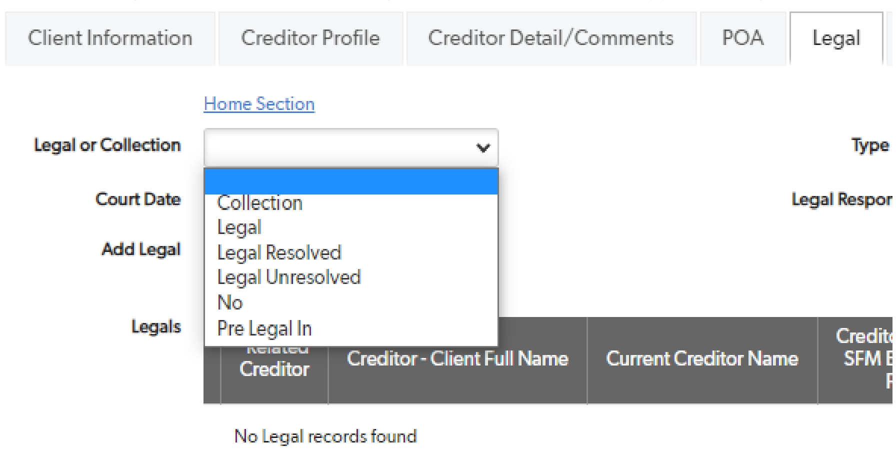
- The client called in because they were provided with a pre-legal document from one of their creditors.

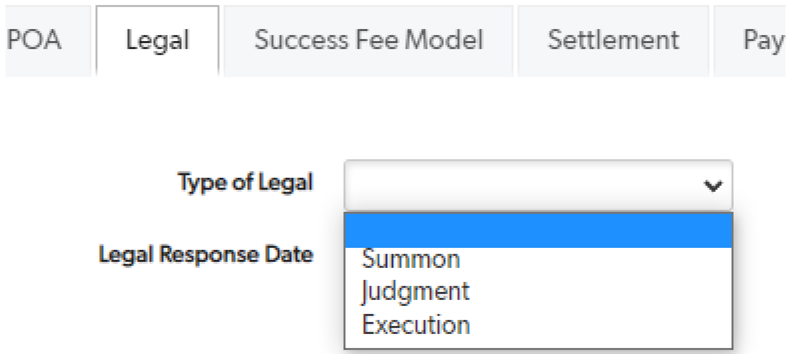
Policy:

- Clients can receive a notice from a creditor stating the account has been placed with an attorney and they may be filing a summons.

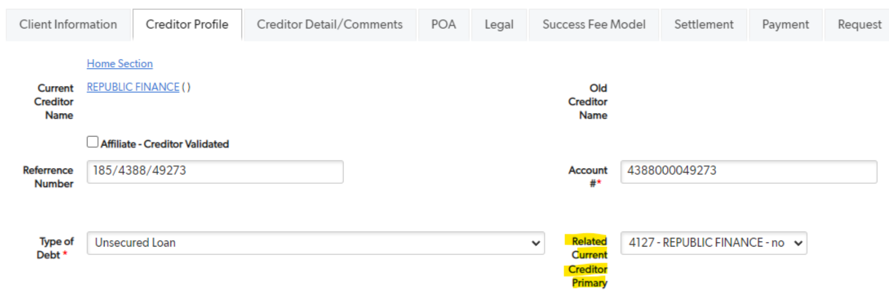
Procedure:

- Encourage the client to upload their legal documents on their client portal.
    - If the client uploads each page individually on the portal, please **MERGE** the pages into one PDF file and upload to the client file.
- If client is unable to upload to client portal, have the client email Legal Documents to CustomerService@clearoneadvantage.com
    - Once received, upload Client File as PDF
- Update creditor name, balance, and status
    - Select the **creditor** in the creditor tab on QuickBase
    - Select *Edit*
    - Under the "*Legal*" tab select the Legal or Collection and Type of Legal





- Under the "*Creditor Profile*" tab select "*Related Current Creditor Primary*" and put in the current creditor



- Under the "*Creditor Detail/Comments*" tab update the "*Current Balance*"

- Save and Close

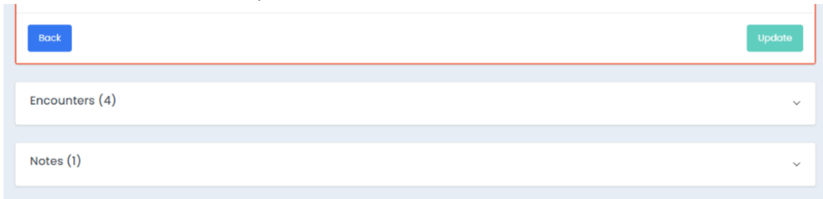
4.Note the client page of details the client shared regarding the summons, court date, and Summons uploaded to client files.

5.Complete the intake form, please refer to Intake Form SOP

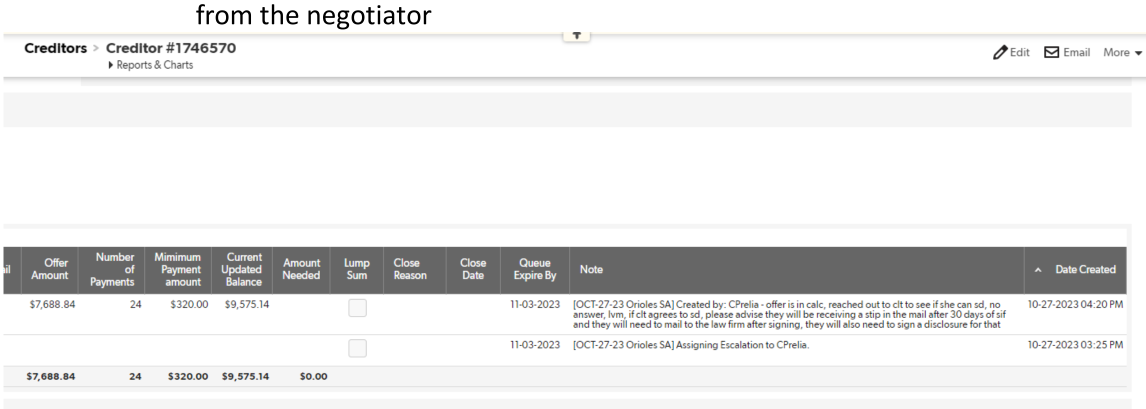
Exceptions:

- If the creditor is actively garnishing, advise the client we cannot settle that account, and it will need to be removed from the program. Once they are able to collect funds, they are no longer willing to negotiate.

- If a client is calling in for a follow up on an existing legal account they already discussed with Client Relations, review the intake form and the creditor's page for notes to provide updates directly to client.
    - Once the Intake form, review the Encounters & Notes at the bottom



    - Go to the creditor’s page to review the Creditor Detail/Comments tab for notes from the negotiator



Offer Amount	Number of Payments	Mimimum Payment amount	Current Updated Balance	Amount Needed	Lump Sum	Close Reason	Close Date	Queue Expire By	Note	Date Created
$7,688.84	24	$320.00	$9,575.14					11-03-2023	[OCT-27-23 Orioles SA] Created by: CPrelia - offer is in calc, reached out to clt to see if she can sd, no answer, lvm, if clt agrees to sd, please advise they will be receiving a stip in the mail after 30 days of sif and they will need to mail to the law firm after signing, they will also need to sign a disclosure for that	10-27-2023 04:20 PM
								11-03-2023	[OCT-27-23 Orioles SA] Assigning Escalation to CPrelia.	10-27-2023 03:25 PM
$7,688.84	24	$320.00	$9,575.14	$0.00						