

Status Keys



STATUS	MEANING	TASK
MISSING INFO TO START	Contractor has requested the supplement and we are waiting on additional information to create the estimate.	Perform a full review and notify the contractor of any documents, photos, or information needed. Update the job as normal.
CONTRACTOR REVIEW	The supplement has been uploaded to the contractor CRM and has yet to be reviewed by the contractor.	Upload the estimate to the RISE and contractor CRMS. Create a note to the contractor requesting their approval before sending it to the carrier- make revisions if the contractor requests them.
SUPPLEMENT SENT TO INSURANCE	Supplement has been emailed to the carrier	Send estimate to main carrier email, adjuster email, 3rd party if applicable, and homeowner. Enter a note in both CRMs.
SUPPLEMENT RECEIVED BY INSURANCE	Supplement has been confirmed received by the carrier	Call the adjuster and/or main line to confirm the supplement and documents have been received. Obtain adjuster's direct contact information. Continue following up.
SUBMITTED COUNTER-ARGUMENT	Received an updated SOL and are requesting further approval of denied supplements	Enter SOL 1 commission. Send an email to the carrier requesting additional items be approved. Include pictures, building code, additional evidence, etc. Continue following up.
ESCALATED CLAIM	Need assistance from the adjuster's supervisor, manager, or team lead	Follow up with the manager, supervisor, or team lead. Follow up with the main line and progress the escalation if no response is being received.
CONTRACTOR REQUIRED TO ADVANCE	Need assistance from the contractor	Follow up with the contractor until you receive what is needed to progress communications with insurance
WAITING ON BUILD	Pre-build supplements are completed with approval from the carrier and contractor. Waiting for build to be completed.	Follow up bi-weekly with the contractor and update the RISE CRM with current status.
CONFIRM WORK COMPLETED	Post-build supplements are completed with approval from carrier and contractor. Waiting for contractor to confirm the line items completed before putting the final invoice together.	Follow up with the contractor until you receive the information needed to create the final invoice.
FINAL INVOICE SENT TO CARRIER	Final invoice and line items completed have been sent to carrier	Send to carrier and request that depreciation/PWI be released. Call to confirm receival and continue following up.
FINAL INVOICE RECEIVED BY CARRIER	Final invoice has been confirmed received by the carrier	Call the adjuster and/or main line to confirm the supplement and documents have been received. Obtain adjuster's direct contact information as the claim may have been reassigned. Continue following up.
MONEY RELEASED TO HOMEOWNER	Confirmed with carrier all funds have been released per work completed. Final dollar amount confirmed.	Notate the confirmation and dollar amount in contractor CRM
COMPLETED	Money released and job completed. Contractor is ready to bill.	Receive approval from contractor that supplementing/invoicing is complete. Enter all final RCV numbers and all remaining commissions.