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| **Client Relations: Notice of Escalated Complaint** | | | |
| **Complaint was escalated within the business area (yes or no)**  **If no, please provide reason** | **Yes** | **Escalated to:** | |
| **No** | **Reason:** | |
| **Complaint referred to Client Relations by:** | **Name:**  **Ext:** | | |
| **Indicate if client threatened to contact: Lawyer / Media / Regulator** | **Legal Threat**  **Media Threat (including social media)**  **Regulator Threat** | | |
| **If threat was indicated above please explain in detail the threat that was made:** |  | | |
| **Nature of Complaint:** | **Please refer to log #81700486.**  **This case needs to be with CRU as it’s already met all channels – SENIORS and TECH.**  Client is unhappy as her claims are being denied upon late file. This is regarding claims that she submitted in September which is supposed to be within the 30 day period but was not reimbursed. She was on maternity leave – she’d like to appeal MLI’s decision.  **Notes from the Desktop logger**  There was a project implemented by BU for Postmedia Network Inc. See below details of the project  This group terminated Eff September 1, 2017 and a 30 day run off period was applicable for claims incurred prior to the termination. Some claims that we received before September 30, 2017 were not processed until October so those expenses were declined because of the suspension date that was added to the system. The client has requested that we process any claims that were incurred prior to September 1, 2017 and received by the September 30th deadline. The suspension date has been removed to allow for this, however it will be put back on the system by midnight Monday October 30, 2017.  Review the attached report for all claims incurred prior the termination date of September 1, 2017 and received between September 1, 2017 and September 30, 2017 and reprocess on CII for the amount eligible based on the contractual limitations. If the claim was incurred after the termination date or was received after September 30, 2017, we should continue to decline the expense. You will need to reprocess using a received date of September 30th. | | |
| **Findings and Action Taken to resolve issue:** | Anne Katherine Boyore handled this complaint – She spoke to EE and explained that we can no longer reprocess claims because of plan set up ( ASO ) advised to check with her new carrier. | | |
| **Caller information and relationship to policy/claim:** | **Name:** |  | |
| **Relationship:** |  | |
| **Contact Info:** |  | |
| **Client/Member Contact Information:** | **Name:** |  | |
| **Address:** |  | |
| **Phone Number:** |  | |
| **Line of Business with applicable policy/claim number:** | **Affinity** | **Policy Number:** |  |
| **GB H&D** | **Plan/Cert Number:** |  |
| **Disability** | **Claim Number:** |  |
| **GRS** | **Cust ID/ Policy No:** |  |
| **IIC** | **Policy Number:** |  |
| **IWM** | **Policy Number:** |  |
| **Advisor Information (if applicable)** | **Name:** |  | |
| **Channel:** | **Corporate Accounts (MGA)**  **National Accounts**  **Independent Advisor** | |
| **Advisor  Code(s):** |  | |
| **Branch or Broker Name:** |  | |
| **Is this an Elite or Premier advisor?** | **Yes**  **No** | |
| **Preferred Method of Contact:** | **Phone**  **Email**  **Letter** | | |
| **Additional Information to assist with investigation (supporting documentation should be sent with email referral):** | **Claim information :**  **1 301017 965.58 S 110916 131116 197.32 197.32 F 010203 C M LDJR**  **LISSA / DAVID / ALEXIS N**    **2 S 171116 111216 468.30 468.30 02 C M**  **DAVID N**    **3 S 100117 100417 189.12 189.12 010203 C M**  **LISSA / DAVID / ALEXIS N**    **4 S 100517 060817 110.84 110.84 02 C M**  **DAVID N** | | |