

Intake Verification Process SOPs

1. Initial Call Handling:

- Receive the client's call and complete the intake process.

2. Collection and Verification of Documents/Information:

- Ensure all collected IDs are legible.
 - If the Driver's License is expired, request a valid alternative (e.g., passport).
- Obtain the Police Report.
- Verify the following client details to ensure accuracy:
 - Date of Birth (DOB)
 - Address (must match the Smart Advocate/Contract).
 - Its okay if the ID has a different address and our client as moved somewhere else, their correct address should match SA/Contract.
 - Always check the first page of contract if it matches with your SA.
 - In case of any mistake in the contract's first page, rectify it asap by re-sending the document
 - The DOL (date of loss; accident) should be CORRECT.
 - Make sure the FULL NAME (first,middle,last) is on the contract and it matches the ID.
 - The proof of ID you receive needs to be a CLEAR picture, in case of an unclear blur picture, request the client for another picture

3. Data Entry and Handoff:

- Upload the client's ID and Police Report to the **Smart Advocate** system
- Make sure the proof of ID is uploaded under the documents.