

SMART ADVOCATE CHECK LIST:

Documents:

- Police Report – (Sub Category: POLICE REPORT/INVESTIGATIONS)
- CONTRACT – (Sub Category: AGREEMENT/PLAINTIFF)
- CERTIFICATE (Sub Category: AGREEMENT/PLAINTIFF)
- DocuSign History (Sub Category: AGREEMENT/PLAINTIFF)

Call Recordings:

Intake Disclaimer –(Sub Category: Client, Call)

Initial Intake Call recording (if disclaimer was not in the same recording)

Screenshots:

Incoming Call Screenshot – (Sub Category: Client Call)

Welcome Text (referrals) –(Sub Category: Photo/Other)

Loan Text. (bblg only) –(Sub Category: Photo/Other)

Photos:

Property Damages (no sub category need)

Drivers License (no sub category need)

Case Status

- Hit Retain on SA if the client has signed.
- Contract Signed / Email Sent should pop up once you hit Retain
- If it's a follow up – Please put in Contract Sent Pending Signature OR Follow Up.

Critical Comment

- Contract Signed ✓ | Intake Disclaimer Completed - Name ✓ | Client Willing to go to Treatments.
✓ Client Needs PD Assistance

TAG

- Intake Language (English or Spanish)
- MISSING LOR (Only for BBLG cases)

Language & Race

- Primary Language
- Ethnicity

Tasks

- Complete all tasks