

## EXAMINER STATUS REQUIREMENTS

Status on your cases is probably one of the most redundant aspects in this business but is also one of the most crucial. It is the open line of communication with our customers that is reviewed every single day. As you well know, when it comes to human lives, none of us know when our number is up so in the effort of getting insurance policies issued, time is of the essence. You cannot waste one single day of communication. These guidelines are set to document cases and to eliminate any problems that may arise including legal issues. Please be aware, that if any legal action is taken on behalf of an applicant, all phone records will be pulled from us and examiners as a part of the legal process to document all calls made **to** the applicants as well as return calls **from** the applicants. This will also include your status input in any form.

Once the agent gets the Part 1 of the application signed, they are required to get this application along with the paramed results to the company within 30 days. After 30 days, they have to re-submit. This explains why our time service for completion is 7 to 10 days after we receive the order. Many of the companies are now starting to implement fines for bad time service and bad documentation which will be passed onto the examiners.

Our job at this branch office is to protect ourselves and our examiners. Please find below, our requirements and list of examiner status codes.

### REQUIREMENTS

- 1<sup>st</sup> call on a case is to be made and status is to be updated in **24 hours**
- 2<sup>nd</sup> and subsequent calls are to be made every **48 hours**
- If no return call after 7 days, your status coordinator will call the applicant and will send a postcard asking them to call you. You are to continue calling and update your status until further notice
- Preset dates are to be confirmed with the applicant immediately. If the preset is good, please enter the 105 code
- If preset dates cannot be met, please reschedule ASAP and input the rescheduled date. If this is the only date available for the applicant, you are to let your status coordinator know immediately so we can reassign
- Cancellations and no-shows whether it is due to the examiner or the applicant, are to be reported immediately
- Completed exams are to be reported same day with the 730 code
- Completed paperwork is to be faxed within **24 hours** of the completion date
- You are responsible for obtaining the necessary forms. If they are not available on your examiner website, they are available on ours
- Often times we are not provided a phone number. We do our best to check for a number but if one is not provided, please be sure to check your local directory or the white pages on the internet. A site I recommend is: [http://www.whitepages.com/10583/?source=GO000009&KW=telephone\\_search](http://www.whitepages.com/10583/?source=GO000009&KW=telephone_search)  
If you cannot locate a number, please contact your status coordinator for assistance. We will then send a post card. If you DO locate a number, please advise us so we can update our system

**EXAMINER WEBSITE STATUS CODES**

057	Applicant Info Updated	<b>THIS CODE IS FOR OUR OFFICE USE ONLY AND IS NOT TO BE USED BY EXAMINERS</b>
060	Left Message Home	Must be entered separately! Do not combine your message in the comment section, No explanation necessary
061	Left Message Work	Must be entered separately! Do not combine your message in the comment section, No explanation necessary
062	Left Message Cell	Must be entered separately! Do not combine your message in the comment section, No explanation necessary
070	No Answer by Applicant	This code is to be used even if there is not an answering machine. No explanation is necessary in the comments
080	Post Card sent to Applicant	<b>THIS CODE IS FOR OUR OFFICE USE ONLY AND IS NOT TO BE USED BY EXAMINER</b>
105	Confirmed Preset Appointment	This will assist us in knowing the preset is a GO
110	Appointment Scheduled	No explanation is necessary in the comments – <b>IF SCHEDULED BETWEEN NOON AND 1:00, PLEASE PUT IN 1:30!!!! THERE IS SOME TYPE OF A COMPUTER GLITCH AND THIS TIME FRAME WILL NOT SET!</b>
115	Appointment Canceled by Applicant	Please comment the reason and your next follow up date and contact your status coordinator
121	Appointment Rescheduled due to Applicant	Please comment the reason and status the rescheduled date
123	Appointment Rescheduled due to Examiner	<b>This should be very, very rare!!!!</b> Only used in an emergency situation. Please contact your status coordinator
140	Original preset Date Changed	Please use code 110
200	Applicant Not Available	This is to be used if they are out of town, on vacation, sick, etc. Your are to put in the next follow-up date or the date they are available and are to comment to us
220	Problem, Applicant Will Not Return Calls	This code will alert your status coordinator to mail a postcard and contact the agent
240	Appointment canceled by Applicant	DUPLICATE CODE. DO NOT USE
245	Appointment canceled by Examiner	<b>This should not be used. You are to call your status coordinator</b>
280	No Show By Applicant	Please comment to us the details and then call to try to reschedule and status
300	Applicant is Unaware of Insurance	Please comment the remarks from the applicant and advise us of the next follow up
310	Applicant Does Not Want Insurance	No explanation is necessary in the comments
320	Unable to Obtain Blood	Please call your status coordinator
330	Unable to Obtain Urine	Please call your status coordinator and reschedule
340	Applicant Refused Service	Please comment the reason for the refusal
725	Appointment Met	Please use code 730
730	Services Completed by Examiner	No explanation necessary in the comments
745	Originals Mailed to Customer	No explanation necessary in the comments
770	Application Not Picked Up	No explanation necessary in the comments
780	Application Picked Up	No explanation necessary in the comments

**YOUR COMMENTS COME TO US IN A SEPARATE EMAIL. WE DO NOT RECEIVE THEM IMMEDIATELY.**

➤ Tip: You can sort your cases on your website by **last status** date. This will assist you in getting the older ones contacted first 😊