**CASE MANAGER JOB DESCRIPTION**

1. **Handle potential new client intakes** – Input detailed and accurate information into lead docket, collect and upload important case documentation, express empathy and passion for clients needs. Use DocuSign for all client engagement documents and ensuring return within 48 hours.

2. **Set up referrals for clients** – To medical providers, body shops, and potentially refer unqualified leads to other firms.

3. **Assist clients with Property Damage** – Work with client, body shops, Insurance PD adjustors, towing companies, and rental car companies. Handle most of the communication with all parties involved, follow up on status, fight for rental car extensions, and walk cent through entire Total loss process. Dealing with Vehicle titles and power of attorney/release of interests forms from the DOL.

4. **Filevine Client Case Management** – Manage all client files. Ensure file organization of detailed and correct client contact and case information.

5. **Medical Records Management** – Ensure all client treatment provider records are requested, followed up on, received and uploaded. I Utilize Chartswap, Ciox, and Fax to accomplish these tasks along with paying for invoices.

6. **Client Experience –** Guaranteed exceptional customer service. Provide client updates on a consistent basis and try to make sure we call our clients before they call us. Client communication is as follows: Follow up with clients to ensure consistent medical treatment, follow up with clients to provide updates on case status, follow up with clients to express empathy, follow up with clients to answer questions. Always going above and beyond to help clients recover the most money and have a stress-free post-accident experience.

7. **Documentation creation, submission, and retrieval** – This entails everything from police reports, wage loss documents, letters of representation, notices of withdrawal, written statements, and many more. It is my job to ensure all required documents are sent to the insurance companies and clients along with making sure our firm has all the necessary documents for demand.

8. **Firm technology manager??? –** Take lead on website development and upkeep, Filevine/Lead Docket issues, any other software/technology issues that may arise for team members.

9. **Firm Brand Ambassador –** Represent firm with the utmost respect, loyalty and hard work. Increase 5-star Google Reviews, share Law Firm material with others, hand out business cards to try and grow the business.

**Client Intakes**

First, I sit down or am over the phone with a client, and tell them a little bit about myself as a case manager for Habtemariam Law. I express my empathy for their situation and explain that we are equipped with the experience and tools needed to help them with their case.

I then ask them to just explain to me what happened and try to listen as closely as possible, picking up on any and all details.

I then walk them through all of our intake questions, making sure to gather all necessary information and input into to Lead Docket.

Based off the type of case, my next steps are different. If the case is strong and something we are familiar with or liability has already been established, my goal is to sign them up right then and there. I would proceed to explain exactly how I would help them with their case and the value I add. I reassure the client that I am here to help them have the most stress-free post-accident process possible. I then work to have them sign the contract and HIPPA form right away before they leave or hang up.

If the case is iffy or if the liability is not clear, I still explain to the potential client what my role would be in their case and that we are equipped to help them, but I express that my team and I will have to investigate and confirm liability before signing up the client. I have them sign the Authorization to investigate form.

If the case is an unqualified lead, I make sure to still listen to their concerns and advise them on best next steps. I will also make sure to refer them to the right people that may be able to better assist them then our firm.

Potential red flags to look out for during an intake are as follows

1. Police report putting our client at fault

2. Police never showed up/Called and it’s a “he said” “she said”

3. Client has waited more then 2 months to start treating for “injuries” or is unwilling to treat with a medical provider

4. Client

**Property Damage**

Property damage is not straight forward, or clear cut and every accident, case, or insurance company handles property damage differently. PD is always dependent on something. It depends on if our client has 1P collision coverage, it depends on if 3P insurance covers rental cars or cuts a loss of use check, it depends on if the car is a total loss or repairable. There are so many factors involved including body shops, tow yards, insurance companies, vehicle types, and client’s flexibility.

To begin the process of solving property damage, you have to confirm with your client a few important details

1. Where is the vehicle located?

2. Pictures of the damage to their vehicle

3. Is the vehicle drivable?

4. Do you own the vehicle or is there a lean on it?

5. Was there any existing damage to the vehicle?

6. Was it towed? Which towing company?

7. Is the vehicle in your name? Do you have the title?

8. Do you have a preferred body shop, or can we use one local to you or can we use a repair shop that is recommended from the insurance company? (It is the clients right to have their vehicle repaired wherever they choose)

9. Do you have collision or rental car coverage through your 1P insurance?

Once you have all these questions answered, you can begin the process of working with the insurance companies assigned PD adjustor.

The goal is to get the client vehicle inspected and evaluated as soon as possible to mitigate costs and determine if the vehicle is repairable or a total loss.

If the vehicle is repairable, getting that vehicle set up with a body shop and having our client set up with a rental car is the ultimate goal. Hopefully, if no issues arise (which is often not the case) then the car is taken to the shop, parts ordered, client gets rental car until vehicle is finished with repairs, insurance company pays body shop, client gets vehicle back and returns rental. There are more details and complications that may arise through supplemental estimates and what not, but that information is learned over time and experience.

If the vehicle Is a total loss, it is important to have the client remove all personal property from the vehicle and to retrieve the vehicle title. The insurance company will assign a total loss adjustor and they will utilize a system and an inspection to create a market evaluation report. This report outlines vehicle value based off year, condition, and mileage, along with the value of similar vehicles in the local area. I will review this report with my client and my client will have the option to relinquish the vehicle to the insurance company or to keep the vehicle and pay a small fee. Paperwork will ensue depending on the client choice.

**Medical Records**

Requesting medical records for our clients is crucial to the success of our firm and our clients’ cases. To request records for our clients, we need them to sign our HIPPA authorization/release of information. This document allows our firm to request, access, and review the information from our client’s medical treatment providers. For the HIPPA document, we must remember to edit the expiration date to reflect the Statute of Limitations, which is 3 years from the date of the accident for cases in Washington State. Without this, the form expires after 90 days of signature date.

The next important item to remember about requesting medical records is time. Medical providers are usually always behind, and it is extremely vital for us to submit our medical records requests to treatment providers as soon as we know our client has completed their treatment with them. This is even more important when it comes to Hospitals, ER’s, Medical Specialists, and Ambulances, because they can sometime take 1-3 months to respond to our requests. A good habit and routine to get into with all new clients is to confirm all treatment providers they went to and ask for paperwork they may have received such as an after visit summary.

For all Hospital, Ambulance, and Medical Specialists that our clients went to for 1, maybe 2 visits, it is our goal to request those medical records within 3 days of that person becoming our client.

For all treatment providers such as chiropractors, physical therapists, or any other medical providers that our clients seen for an extended period of time, it is vital we request records within 3 days of finding out treatment completion.

All medical records requests are to be submitted with a Request form template and a fully edited HIPPA authorization. Templates and training will be provided.

We utilize multiple systems in order to request and receive medical records such as Chart Swap, CIOX Health, email, and Fax. Each system operates differently and training will be provided.