

What Diligent Follow-Up Means

During the first 10 business days, we make 13 attempts to complete the application and order and schedule the medical exam for your client.

Day 1 (first 24 hours)	<ul style="list-style-type: none">• 1st call to client (phone message left if contact is attempted, but not successful)• Followed immediately by text message• System-generated email goes out to the client	Day 7	<ul style="list-style-type: none">• 7th call to client (phone message stating file will be placed on hold if no response in the next few days)• Followed immediately by text message• Email to the agent stating case will be closed within a few days if we don't hear back
Day 2	<ul style="list-style-type: none">• 2nd call to client (2nd phone message)	Days 8-9	<ul style="list-style-type: none">• Call one time per day - alternate calling morning and evening, leaving no messages
Day 3	<ul style="list-style-type: none">• 3rd call to client (3rd phone message)• Followed immediately by text message• System-generated email goes out to both client and agent	Day 10	<ul style="list-style-type: none">• 10th call to client, leaving a message stating file will be closed out• Email to client, CC agent: File has been closed
Days 4-6	<ul style="list-style-type: none">• Call one time per day - alternate calling morning and evening, leaving no messages		

Once we complete the application, we will follow up directly with the client for additional items. You will receive a notification regarding your case a minimum of:

- **Once every 5 business days**
- **Whenever the case is touched**
- **When there is a change in status**

Feel free to check your case status anytime online!

Just go to: <http://pinneyinsurance.com/case-status/>