

Statuses and ALERTS in I-Linked

Changing statuses is crucial!

Changing statuses, allows each person to take action ONLY when they need to be involved. This small update creates a smooth transition for your prospects to become clients with the least amount of duplication of effort by your team.



MARKETING – New lead in the system. A telemarketer or producer would be assigned to follow up the lead.

NEW OPPORTUNITY - This is the default status for a lead you enter into the system. You may also be assigned a new opportunity by a manager.

RFP TO PROSPECT - You send an RFP (Request for Proposal) and other necessary documents to a prospect to complete and sign.

INFO REQUESTED - Additional information is need on the prospect. Use this status when you are actively waiting for information from a prospect.

RFP COMPLETED - You have received a completed RFP.

Depending on you companies workflow. This might include any or all of the following: Signed RFP, Loss Runs, Loss History Affidavit or other documents. These documents are attached in the DOCS tab on the prospect's record.

IMPORTANT: This is the trigger that automatically notifies your administrator/manager you have a complete submission. The manager can review and send to the PEO or other vendor for underwriting. **Note to managers** : Once you review the submission you can assign a vendor and THEN change the

UNDERWRITING STATUS to RFP to Underwriting. This way the underwriters can begin their job.

PROPOSAL TO PRODUCER - The Rate Indication (quote) has been issued and is available on the DOCS tab.

PROPOSAL TO PROSPECT - The PRODUCER has presented a Rate Indication (quote) to the PROSPECT.

SIGNUP / FULFILL – PROSPECT accepts the quote and is in the processes of completing all sign-up documents.

CLIENT PLACED – All signup documents have been received, reviewed and submitted to the PEO or vendor.

CLIENT RUNNING - CLIENT has run their first payroll and commissions have been paid.(IMPORTANT: This status is changed only by the partner actually PAYING the commissions, usually the PEO.)

FUTURE BUSINESS – PROSPECT is not ready to move forward at this time. Requested contact at a later date.

CLIENT LOST - CLIENT has ceased running with a PEO or vendor. Please note the reason,(business closed, etc).

REFERRAL - PROSPECT has been referred elsewhere.

RESEARCH – Record needs additional research for a new phone number or other information.

NO FURTHER ACTION - PROSPECT has become unresponsive, undesirable or no longer requires services.

OUT OF BUSINESS - Business has closed. This will help us eliminate unwanted records from the database. PLEASE remember use this status ONLY if the prospect is OUT OF BUSINESS. If the prospect is in business but you don't want to call on them please use the NO FURTHER ACTION status.

REMOVE – This is used for a record removed from the system. Example: Test record.

Underwriting Statuses

NOT SENT TO UNDERWRITING – A record that has not been sent to underwriting.

SENT TO UNDERWRITING – This record is complete and has been assigned to a vendor. Now the underwriting process will begin.

INFO REQUESTED – Underwriting needs additional information. Go to the “Message Tab” to see what is being requested.

UNDERWRITING IN PROGRESS – This prospect had been sent to the carrier and is being reviewed.

UNDERWRITING ACCEPTED – This prospect had been accepted. Now you can go the “Forms Tab” and provide your prospect with the necessary sign up paperwork.

UNDERWRITING REJECTED – This prospect has been rejected. Go to the “Message Tab” to see why it was rejected.

ALERT Statuses

NONE – No alert has been set on this record.

CLIENT NON-SUFFICIENT FUNDS – Client did not have sufficient funds to cover their payroll charges.

NO PAYROLL SUBMITTED – Client did not submit a payroll for the current pay period.

PAYROLL RETURNED – Client did not accept the current payroll.

REQUESTED LOSS RUNS – Client has requested loss runs from the PEO. This might mean they are shopping for a new workers' compensation provider.

TERMED NON-PAYMENT – Client has been termed because they have not paid their payroll charges.

TERMED VOLUNTARY – Client is in good standing with the PEO but has decided to stop running with them.

TERMED NON-PROCESSING – Client is no longer processing payrolls.

CLAIM REPORTED – Client has reported a claim.

CLAIM INVESTIGATION – Client claim is being investigated.

CLAIM OPEN – Client claim is open.

CLAIM CLOSED – Client claim is closed.

REINSTATEMENT – Client has requested reinstatement.



CLAIM Statuses

NONE – No active claims on this record.

CLAIM REPORTED – Client has reported a claim.

CLAIM INVESTIGATION – Client claim is being investigated.

CLAIM OPEN – Client claim is open.

CLAIM CLOSED – Client claim is closed.