

## Claim Closeout Process

The claim closeout process follows the same steps as other approval processes in the Heating Oil Insurance Program. The Service Provider selected by the insured to complete work for the claim submits the claim for closeout, which notifies the insured (or authorized representative) that their claim is in the closeout process and pending their approval. Once approved by the insured, the claim closeout is sent to PLIA for review and approval. Once the claim closeout has been reviewed and approved by PLIA, an email, or a paper letter, is sent to the insured summarizing their claim details and notifying them that their claim is now closed.

### Submit for Approval by Insured

To submit a claim for closeout, navigate to the claim that is ready for closeout. In the upper right-hand corner, select “Closeout”.

**Please note:** Your final invoice and final report should be submitted via the Online Community before you begin the claim closeout process.

The screenshot shows the web interface for a Heating Oil Claim (C-05207). The status is 'Approved'. The 'Closeout' button is highlighted with a red box. The 'Site Information' section displays the following details:

Heating Oil Claim Number	C-05207	Address of Tank	123 45th Lane, Newport, WA 99156
Registration Number	99987	Tax Parcel Number	987654321
Status	Approved	Insured Name	Daisy Test

The 'Work Plans (3+)' section displays the following details:

WP-000990	Primary Co... Daisy Test
Type:	Scope of Work
Status:	Approved
WP-000992	Primary Co... Daisy Test

When the “Closeout” button is selected, the following fields are displayed:

- **All invoices have been submitted** (checked by default, cannot be unchecked)
- **Closeout report has been submitted** (checked by default, cannot be unchecked)
- **I verify that all work is complete** (checked by default, cannot be unchecked)
- **Tons remediated** (enter the tonnage excavated – if applicable)

Click “Save”.

**Please note:** When you click the “Save” button, you are verifying that each of the statements above is true.

Clicking the “Save” button changes the Status to “Pending Owner Approval” and locks the claim. If approved by the insured (or authorized representative), the closeout goes to PLIA for review and approval. While under review by PLIA, the Status will change several times until it reaches the final Status of “Closed”. A claim closeout letter will be sent to the insured when the claim is closed. Once the claim is closed, the claim record is locked and can no longer be edited by either the insured or the service provider.