Claims Task Checklist

ASAP
7 DAYS POST-CLAIM
ONCE CLAIM COMPLETE

Name of Insured:

Date Request Opened:

- ☐ Review claim details and assign appropriate team member to own the request
- ☐ Verify contact data is complete and accurate in Nexsure
- ☐ If additional info is needed from Client, gather it with urgency
- ☐ If direct access carrier, process First Notice Of Loss for Client
- ☐ If brokerage access carrier, send request and documentation to claims contact
- ☐ Activate claims service automation in Nexsure
- ☐ Update contact in Nexsure; create notes as needed to document
- ☐ Phone call to claims contact once per week until resolved successfully
- ☐ Confirm client has received all necessary documentation for resolution of claim
- ☐ Perform Happiness Check to complete the claims request workflow
- ☐ Remind Client of the client portal and claims request webforms if they aren't using them