Service Request Task Checklist

ASAP
WITHIN 1 BUSINESS DAY OR ASAP
ONCE S.R. COMPLETE

Name of Insured:

Date Request Opened:

- [ ] Review request 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 S.R. as requested where possible
- [ ] If brokerage access carrier, send request and documentation to service contact
- [ ] When updated documentation is received, forward to Client or upload to their client portal
- [ ] Update contact in Nexsure; create notes as needed to document
- [ ] Create action(s) for relevant team member for any necessary follow-up items
- [ ] Confirm client has received all necessary documentation
- [ ] Perform Happiness Check to complete the service request workflow
- [ ] Remind Client of the client portal and service request webforms if they aren't using them