

THE ART AGENCY · DAILY CHECKLIST

Daily CSR Checklist

Work top-to-bottom every business day.

Mirrors Operations Handbook Appendix B · AMS360 CSR & Producer Operating Guide §24–§25

Daily Workflow — Top to Bottom

- ☐ Review the AMS360 activity queue for open tasks
- ☐ Process carrier downloads and reconcile discrepancies
- ☐ Handle endorsement requests (Operating Guide §12.1)
- ☐ Issue certificates of insurance as requested
- ☐ Return customer service calls and emails
- ☐ File incoming documents to the appropriate AMS360 records
- ☐ Review the upcoming renewal list (60-day advance)
- ☐ Report any FNOL claims to carriers (same business day)
- ☐ Work the AMS360 download hold daily — don't double-key a downloading carrier
- ☐ Log an Activity for every customer touch; add a Suspense for every follow-up
- ☐ Verify limits against the live policy before issuing any COI or eForm — endorse first if the policy doesn't carry it
- ☐ Replace binders with the dec page once it issues; issue COIs same-day

CSR: _____ **Date:** _____