Insurance CSR Onboarding Checklist

Get a new CSR comfortable with systems, service standards, and daily requests, with checkpoints through the first 30 days.

WHO USES IT	Manager, Agency Owner, Admin
LINES	Not line-specific
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MAINTAINED BY	AgencyPacket
ONLINE	https://agencypacket.com/resources/insurance-csr-onboarding-checklist

BEFORE YOU USE THIS
Review this against your agency's current processes, carrier guidelines, and E&O requirements before you put it into practice. Insurance rules vary by state, and some requirements are set at the local level, so confirm the licensing, disclosure, filing, and recordkeeping rules that apply where you operate. This resource is general guidance, not legal, compliance, or insurance advice. See our Terms at https://agencypacket.com/terms. Many states have insurance data security and breach notification rules. Check the ones that apply to you.

Purpose

A new CSR has to learn the AMS, the carriers, and the agency's way of doing things, all while taking calls. A plan makes it easier on them and on your clients.

When to use it

Use it when a new CSR accepts an offer. Start preparing systems before day one.

Process owner

The service manager or agency owner owns onboarding. A senior CSR mentors the new hire.

Before you begin: required information

- Signed offer and start date
- List of systems and carrier portals needed
- Mentor assigned
- Training schedule and materials

Procedure

Systems access

- ☐ Create email, phone, AMS, document system, and carrier portal accounts in the CSR's own name.

- [ ] Set permissions for the role. Do not copy another person's access.
- [ ] Test every login on day one.
- [ ] Explain multi-factor authentication and password rules.

Customer service standards

- [ ] Review how to answer the phone, return calls, and follow up on emails.
- [ ] Review response time standards.
- [ ] Review how to verify who is calling.
- [ ] Show how to log every client contact.

AMS training

- [ ] Find an account, add a note, attach a document, and create a task.
- [ ] Read a policy record, including coverages, interests, and vehicles or locations.
- [ ] Run the basic reports.

Policy changes and billing

- [ ] Learn the endorsement request process, with practice cases.
- [ ] Learn vehicle and driver changes, address changes, and lender changes.
- [ ] Learn how billing works for each carrier you service: direct bill, agency bill, and premium finance.
- [ ] Learn who to ask when a payment or refund is unclear.

Claims procedures

- [ ] Review how to take a first notice of loss.
- [ ] Know which carrier numbers to give and when.
- [ ] Know what you can say and what you can't. Don't discuss coverage decisions as if they are final.
- [ ] Document the claim contact in the AMS.

Certificates and renewals

- [ ] Review the certificate of insurance process and what the agency will not issue without approval.
- [ ] Review the renewal process: reports, outreach, and documentation.
- [ ] Practice with sample cases.

Privacy and security

- [ ] Review the agency's privacy and security policy.
- [ ] Review how to handle client documents, sensitive personal information, and email.
- [ ] Review how to report a suspected mistake or a data security incident.

Carrier procedures and shadowing

- [ ] Review how each of your main carriers handles service requests.
- [ ] Shadow a senior CSR for at least a week.
- [ ] Practice with a senior CSR listening in.

Quality review and 30-day checkpoint

- [ ] A senior team member reviews the CSR's first 20 completed requests for accuracy.

- [ ] Week 1: systems access and basics.
- [ ] Week 2: handling requests with a mentor.
- [ ] Week 4: handling routine requests alone, with spot checks.
- [ ] Day 30: written review with the manager. List strengths, gaps, and next training.

Execution checklist

- [ ] Systems accounts created in the CSR's own name
- [ ] Service standards reviewed
- [ ] AMS basics practiced
- [ ] Policy change and billing process learned
- [ ] Claims intake procedure learned
- [ ] Certificate and renewal process learned
- [ ] Privacy and security policy reviewed
- [ ] Shadowing completed
- [ ] First 20 requests reviewed
- [ ] 30-day review held

Exceptions and escalation

- **Systems access is delayed.** Use shadowing and training while you wait. Don't share logins.
- **New CSR makes repeated errors.** Review the process, don't blame. Add training.
- **A client asks about something the CSR doesn't know.** Teach them to say "I'll find out and call you back" and then do it.

Completion criteria

- The CSR has working access in their own name.
- They have handled the standard request types with review.
- Quality checks are complete and logged.
- A 30-day review is documented.

Make it yours: agency customization

This is a starting point built for independent agencies in general. Fill in the details below so it matches how your agency actually works, then keep your version with your other procedures.

Systems this CSR needs
List them.

Mentor
Name.

Service standards
Response times, call handling.

Which requests the CSR can process alone, and from what date
List.

ASSIGN IT, TRACK IT
Need to assign this process to your team? Turn it into a repeatable workflow with AgencyPacket.

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