

CAAIS

SERVICE



STANDARDS

WWW.COMBINEDAGENTS.COM/CAAIS

TRANSACTION

TURNAROUND TIME

CORRESPONDENCE

Phone Calls / Voicemails	AM - Same Day PM - By Noon Following Day (Recommend Email Confirming Conversation to Document Epic, if Needed)
Emails	Immediately When Possible or Within 24 Hours

SERVICING/PROCESSING

Bind Requests	Same Day Acknowledgment to Member Sent to Carrier Same Day (if Effective Date is Day of Receipt) or Within 24 Hours
Processing Policies	Within 24 Hours of Receipt from Carrier or Portal Download
Endorsements	Same Day Acknowledgment to Member Sent to Carrier Same Day (if Effective Date is Day of Receipt) or Within 24 Hours Documents Sent to Member within 48 Hours of Receipt from Carrier
Audits	Processed and Sent to Member Within 48 Hours of Receipt from Carrier
Inspections / Loss Control Surveys	Reviewed and Sent to Member Within 72 Hours; Follow-Ups Set for 7 Days if Additional Information Needed

TRANSACTION

TURNAROUND TIME

NEW BUSINESS

Epic Submission Clearance / Acknowledgement to Member	Within 24 Hours
Quote in Portal / Submit to Carrier	Within 48 Hours
Status Updates (i.e. Contact Carrier to Obtain Update and Provide to Member)	Weekly

*TIMELINE BASED ON THE TIME/DATE A COMPLETE/QUALIFIED SUBMISSION IS RECEIVED.

RENEWAL BUSINESS

Carrier Information Request	Request Information from Member Within 24 Hours
Quote	30-45 Days Prior to Expiration Date

*NUMBER OF DAYS VARY BY RISK STATE; STATE MINIMUMS OVERRIDE SERVICE STANDARDS.