WORKERS' COMPENSATION / 01

MAP BUSINESS AND WORKFORCE INPUTS

Describe broad categories without employee names, payroll figures, claim details, identifiers or coverage conclusions.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Business A / activity categories / no client names

Work states or program questions / official route to confirm

Role Group A / broad duties / no employee names

Worker-count range or seasonal pattern / no payroll figures

Locations, travel, vehicles or site-work categories

Existing-policy or renewal context / no policy number

Preparation only. Confirm scope and terms with the professional.

WORKERS' COMPENSATION / 02

DEFINE POLICY AND SERVICE ROLES

Ask providers to document their assumptions and service responsibilities without using this sheet to determine coverage or classification.

Classification, jurisdiction or program question / who confirms

Proposed policy details, limits, endorsements and exclusions

Broker, carrier, payroll and certificate responsibilities

Audit records, preparation and reconciliation workflow

Claim-reporting support, contacts and escalation roles

Renewal, business-change, cancellation and closeout handoff

Preparation only. Confirm scope and terms with the professional.

WORKERS' COMPENSATION / 03

CHECK PROPOSAL READINESS

Tick what is organized. These checks do not confirm eligibility, classification, coverage or claim handling.

- [ ] Every provider receives the same non-sensitive business brief
- [ ] Employee, payroll, claim and policy identifiers remain private
- [ ] Business activities and role groups are described neutrally
- [ ] Work locations and program questions are visible
- [ ] Provider assumptions and proposed policy details are written
- [ ] Certificates, records and coordination roles are assigned
- [ ] Audit, renewal and change workflows are described
- [ ] Coverage and classification decisions remain with qualified parties

Open jurisdiction, classification or coverage question / confirmer

Unassigned certificate, record, audit or change responsibility

Missing assumption, exclusion, service contact or handoff detail

Preparation only. Confirm scope and terms with the professional.

WORKERS' COMPENSATION / 04

QUESTIONS FOR THE WORKERS' COMPENSATION PROVIDER

Record the answer and where it appears in the proposal, policy material or service documents.

Inputs: what activity, workforce, location and program information is needed?

Confirmation: which classifications or routes require licensed or official review?

Proposal: what policy details, limits, endorsements and exclusions are written?

Roles: who handles certificates, records, payroll coordination and changes?

Lifecycle: how do audit, reconciliation, renewal and cancellation handoffs work?

Support: what claim-reporting contacts and escalation roles are included?

Preparation only. Confirm scope and terms with the professional.

WORKERS' COMPENSATION / 05

COMPARE THE SAME BUSINESS BRIEF

Use Provider A and B. Clarify unlike classification, jurisdiction, policy or service assumptions before comparing proposals.

Provider A / B / proposal dates / shared Business A brief

Assumptions, program route and proposed policy details - A / B

Service, certificate, records and audit responsibilities - A / B

Renewal, changes, claim support, exclusions and handoff - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Workers' Compensation request. Share a non-sensitive business, workforce and service-responsibility brief so participating pros can compete with proposals. Compare assumptions, proposed policy and service scope, coordination roles, audit and renewal workflow, exclusions and fit. A private workforce, jurisdiction, records and provider-assumption review may be needed before a final proposal.

One request. Every pro's best offer.

Start a request

Participation varies. A private workforce, jurisdiction, records and provider-assumption review may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/workers-comp

U.S. Department of Labor: Workers' Compensation (official reference)

National Association of Insurance Commissioners: Small Business Insurance (official reference)

Preparation only. Confirm scope and terms with the professional.