



PRELIMINARY REPORT CHECKLIST

All areas of the Preliminary Report should reflect what the adjuster observes during the inspection and should match the loss notice. If there are discrepancies on the loss notice identified during the inspection, an Underwriting (UW) Referral is required.

Examiner Name

Policyholder Name

Claim Number

- ☐ **Date:** Populated with date completed.
- ☐ **Adjustment type:** On site or Remote box is checked.
- ☐ **Check boxes:** First box checked and identified. Others that apply can also be checked and submitted separately with supporting documentation attached.
- ☐ **Policyholder information:** Fields are populated and spelled correctly.
 - Policyholder (primary) and Policyholder (additional) – Must match loss notice.
 - Property address – Must match loss notice.
 - Mailing address – “Same as property” is acceptable.
 - Phone #2 – Can be left blank.
 - Email – Field must be populated. If blank, explanation is required in comments.
- ☐ **Insurer information:** All fields are populated and spelled correctly.
 - Policy # – Must match loss notice.
 - Mailing address, city, state, zip – Adjusting Firm
 - Phone #1 – Adjusting Firm; Phone #2 – Adjuster
 - Email – Adjuster
- ☐ **Representative information:** Only required if the policyholder has advised they are being represented. Proper letter of representation is required.
- ☐ **Insurance information:** All fields are populated and spelled correctly.
 - Flood program type – Regular or Emergency
 - SFIP policy type – Dwelling, General Property or RCBAP
 - Term – Verify date of loss falls within policy term.
 - Coverage type – Coverage amount(s) cannot be blank and must match loss notice.
 - Reserve – Cannot be blank. Can be \$0.00 and must be explained on cover page.
- ☐ **Property risk information:** All fields populated (N/A if applicable) and accurate.
 - Nearest body of water to insured property – must be named “Ashley Creek” or “Snake River” not “creek” or “river”
- ☐ **Date and time information:** All fields populated and accurate.
- ☐ **Cause of loss information:** All fields populated and accurate.
- ☐ **Flood water information:** For main building – All fields populated and accurate.

For Appurtenant Structure (detached garage only) – only required if there is a detached garage.

- ☐ **UW REFERRAL** – Must be submitted if there are any discrepancies identified during the inspection. Photographs and other documentation required to support the change must be attached. ***UW Alerts are not required on Group Policies.***
- ☐ **FCN Card** – Must be current year and adjuster must be authorized to handle type of loss. If current FCN Card not yet received, prior year expired card and copy of certificate of completion of reauthorization course must be attached.
- ☐ **Activity Log** – A detailed log showing all activity on the claim is attached.
- ☐ **Photographs** – Must be attached, clear, labeled properly and include:
 - Address verification
 - All elevations and all floors
 - Interior and exterior water heights with tape measure and numbers clearly visible on tape
 - Damaged and undamaged areas
 - Detached garage, if applicable

COMMENTS