

Claim Assistance Guide

Banking, Finance & Fintech

Document type: Plan / SOP / strategy / guide · Generated 27 Aug 2026

This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Builds a claim assistance guide for a given claim type — the process (intimation, documents, cashless vs reimbursement, follow-up, settlement), documents needed, how to avoid rejection (disclosures, timelines) and escalation (grievance, ombudsman). Use this to help clients get claims paid. Claim decisions rest with the insurer.

Purpose of this tool & output

Help clients get claims paid

How the output is used

Use the guide to help clients get claims paid through the right documentation and follow-up.

Important cautions

AI-generated guide; claim decisions rest with the insurer.

Companion documents

- Insurance Advisory Framework
- Policy Comparison Helper
- IRDAI Distribution Compliance
- Policy Renewal Management
- POSP / Agent Setup Guide
- Insurance Proposal Writer

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.