

Use Utica National's Self-Assessment Tool to Help You **Improve** Your Agency



Ever wondered if your agency has a gap in procedures that could lead to an errors & omissions (E&O) incident? You can **feel more secure** knowing that you have benchmarked your procedures with our self-assessment tool that is included at no extra cost to E&O policyholders.

We KNOW

for Insurance Agents

E&O

TOPICS COVERED

- Business Continuity/Disaster Recovery
- Carriers
- Certificates of Insurance
- Claims Handling
- E&O Coverage
- Education
- Employee Benefits
- General Agency Issues
- IT
- Loss Control Services
- Producer Procedures
- Premium Handling
- Record Management
- Surplus Lines
- System/Procedural Issues

Find out if what you do on certificates of insurance, binders, non-payment cancellation notices, documentation, etc., **helps or hurts** your chances of having an E&O incident.

Generate a report on all competencies or just the ones you need to address once you finish the assessment.

Your self-assessment answers and reports will not be shared with Underwriters and will not impact your premiums or policy terms.

ACCESSING THE SELF-ASSESSMENT IS EASY!

- **Get started by going to www.uticanational.com/customercare** and logging in. If you have not previously signed up for our online Customer Care Center, please **click here** for instructions on setting up your account.
- **Click on Risk Management.** If you have any Personal Lines policies through the Utica National companies, you may need to switch the view from personal to commercial at the top left of the screen.
- **Click on Try Our Self-Assessment Tool.**
- **Select the type of agency from the dropdown.**
- **Name your assessment and then click on Create New Assessment.** You will have the ability to save your progress as you complete the assessment.

**Need additional information?
Call us at 1-800-598-8422.**

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