MONTRIDGE INSURANCE SERVICES, INC.

Staffing Renewal Readiness Checklist

Prepare a renewal discussion using current program documents, actual duties and payroll by assignment.

Scope and dates

Record the renewal date, entities, states and covered periods.

Program documents

List policy forms, endorsements, schedules and the last audit.

Assignment exposure

Reconcile by client, site, duties, hours and payroll.

Changes and projections

Flag new tasks, equipment, territories or client obligations.

Loss review

Summarize patterns and record corrective actions by location.

Decision and owners

List open questions, who will resolve them and by when.

Save a local copy. Keep completed records in your organization's approved system.