



citycounty insurance services  
www.cisoregon.org

## **Services Provided by Agents for Public Entities**

1. Renewal:
  - a. Complete application forms in consultation with entity including revisions and corrects of schedule information.
  - b. Review total current operations with entity to be sure proper coverages in place.
  - c. Review for possible alternative limits and coverages, increased limits, or deductible options.
  - d. Obtain alternative quotes as directed by entity.
  - e. Review and compare renewal quotation figures, coverages, and options with entity.
  - f. Confirm renewal with entity and CIS, make sure evidences of coverage are provided as needed pending receipt of CIS issued materials.
  - g. Prepare breakdown of premiums by department for entity.
  - h. Review renewal policy for completeness and accuracy, deliver and review any changes over prior year's program with entity.
  
2. Claims:
  - a. Prepare loss reports using and forward to Pinnacle.
  - b. Monitor claim's status with adjuster and entity.
  - c. Provide other assistance as appropriate, i.e. meet with adjuster, provide photos or other loss detail, co-ordinate services from contractors, etc with entity.

3. Loss Prevention / Control:

- a. Meet with CIS loss control staff either during or after inspections of entity facilities.
- b. Assist as possible with follow-up including actions required and response to CIS loss control.
- c. Encourage and facilitate use of CIS resource material and staff by entity for training and loss prevention/control services.
- d. Provide periodic evaluation of entities loss patterns and trends and, if appropriate, suggest loss control or prevention activities.

4. Miscellaneous Functions:

- a. Notify CIS of changes and provide entity with current schedules reflecting those changes.
- b. Issue certificates of insurance and other verifications of coverage as necessary.
- c. Review property appraisals for accuracy and work with CIS to modify as needed.
- d. Assist entity with accounting and billing issues.
- e. Coordinate and place any needed coverages not provided or not available in present program.
- f. Assist with specific risk management and coverage issues such as those dealing with festivals and special events.
- g. Maintain history of coverages, losses, schedules, changes, inspections and other relevant documents involving agency, covering entity's most recent seven years.